



BOARD OF VISITORS
-December 2013-

B R I E F I N G M A T E R I A L S

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Farmville, VA 23909
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**BOARD OF VISITORS
-December 2013-**

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Tab 1



**BOARD OF VISITORS
-December 2013-**

Schedule of Events and Public Meeting Agenda

Thursday December 5

7:30pm – 9:00pm Dinner for In-Town Board Members and Early Arrivals
Longwood House

*****Public Meeting Agenda*****
*Lancaster Hall
Stallard Board Room
(unless otherwise noted)*

Friday December 6

9:00am – 9:30am Continental Breakfast
9:30am – 10:00am Rector’s Welcome and Consent Agenda
10:00am – 12:00pm President’s Report and Reports from Representatives
-BREAK-
12:00pm – 1:00pm Lunch
1:00pm – 2:30pm Strategic Deliberation
2:30pm – 4:00pm Discussion Focused on Retention
-BREAK-
4:15pm – 5:00pm Executive Session
-BREAK-
6:00pm – 9:00pm Longwood Holiday Dinner
Dorrill Hall

Saturday December 7

Ruffner Hall
9:00am – 9:30am Continental Breakfast
9:30am – 11:00am Faculty and Board Discussion – “The Liberal Arts in Higher Education Today”

Tab 2



Overview Message from the President

copy follows in this tab, as distributed November 26th

From: Reveley IV, Taylor
Sent: Tuesday, November 26, 2013 1:22 PM
Subject: Happy Thanksgiving and Next Week's Meeting

Dear BOV,

Thank you deeply for your wonderful personal notes over the inauguration weekend. It was a sentimental day for the Family Reveley, and far more importantly it was a proud occasion for the Longwood family to celebrate together. After a time of transition, Longwood is moving forward powerfully.

As of today, applications for next year's freshman class are up 25% compared to this time last year. Our philanthropic cash receipts likewise are up by \$1.1 million over this time last year. Media coverage of the work of the University continues to grow, spreading Longwood's name. Our teams have beaten William & Mary, TCU, and Xavier within recent weeks, and last month we also held a marathon reading of Milton's *Paradise Lost*. All the while, we watch the developments and turbulence in higher education with cautious eyes.

Your briefing materials for next week's Board meeting will come to you over the holiday weekend, and a schedule of events is attached. Building on the pattern of our recent board meetings, the intent is to maximize deliberation. To that extent, you will find in your materials a one-page strategic overview which will be a springboard for discussion. You will also find substantive new materials on the central issue of retention which have been prepared by Justin Pope and by David Lehr, our Faculty Senate Chair. Kay Stokes will be following up with you concerning logistics, lodging, and meals next week.

Concerning the potential in improving retention, some deliberately simplified math is included below which underscores the opportunity we have. Nothing else can have the same catalytic effect.

We indeed have great years ahead. As many of you saw, the *Richmond Times-Dispatch* ran a distilled version of my inaugural remarks as an op-ed last week: http://www.timesdispatch.com/opinion/their-opinion/liberal-education-is-a-revolutionary-force/article_ad451b9d-da59-5dd7-ae1-410d2696e3a5.html?TNNoMobile. Longwood is moving from strength to strength.

Have a wonderful Thanksgiving, and see you soon,
Taylor

Revenue Potential of Retention

Currently we receive \$80,000,000 in tuition and fees from 4,500 undergraduate students averaging 22 credit hours annually (i.e. roughly 100,000 credit hours total annually). Keep in mind that we charge by the credit hour rather than by the semester.

The following numbers underscore the potential from focusing on retention; they deliberately show the "highest" water mark to underscore the gains we could realize from even just meaningful progress:

If we were to hold tuition and fees constant and leave the freshman class size at 1,100 but retain at 100% and have average credit hours per student of 30 (i.e. a full load allowing for graduation in four years) and also continue to accept 200 transfer students into the sophomore, junior, and senior classes, then we would have a student body of 5,000 (and 150,000 credit hours total annually) and tuition and fee revenue of \$120,000,000 annually (i.e. \$40,000,000 more annually).

**Note: this calculation does not even contemplate gains from increasing the mix of out-of-state students.*

Longwood President

Liberal education is a revolutionary force

Editor's note: The following is an edited version of remarks by Taylor Reveley IV, upon his inauguration as president of Longwood University.

We gather together today in the heart of Virginia, in the fifth century of this commonwealth, between customary rites of an election and Thanksgiving.

From the beginning, at its establishment as a pioneer in women's education in 1839, Longwood has held to timeless ideals while also rising to the call of new beginnings. Today, as one of the hundred oldest colleges and universities in the country and one of the 50 oldest NCAA Division I schools, Longwood stands within the forefront ranks of America's institutions of higher education.

These 175 years in Virginia and America have seen momentous junctures of national and global crisis as well as momentous progress. Future centuries, I suspect, will see the decades ahead of us today as fulcrum years. The global community is knit together in arts and commerce, yet still divided in diplomacy and arms; we hold in our mortal hands still the power to abolish all forms of human poverty and all forms of human life; science has discovered new suns, orbited by new and lonely planets, with characteristics of our own Earthly home but at astronomical distance in the imponderable vastness of space, and still our ethics and budgets here on Earth struggle to calculate the appropriate distribution of medicines and technology that now, for the first time in humanity's advance, can indeed cure disease and save life. And today higher education itself, of course, is under duress, as budgets tighten and questions over purpose are voiced.

For generations, Longwood's heritage has been as a teaching college. Today we are that and more — we remain one of the nation's best at preparing teachers, while also preparing our students for myriad other honorable professions. Our even deeper heritage, of course, is the liberal arts. At the founding in 1839, at a juncture before any professional career outside the home was meaningfully open to women, including teaching, our curriculum consisted of music, literature, mathematics,

Latin, and Greek. Cicero, writing in a time of peril and growing crisis 2,000 years ago, coined the phrase liberal arts to mean the course of study befitting citizens in a republic; "liberal" having the same root as the word "liberty." Thomas Jefferson, James Madison, Theodore Roosevelt, and Martin Luther King have echoed that call for America.

My own college days are still within the nearer reaches of memory and experience. In that regard, I would like to speak to our students today directly:

You know that you ride a tide of history, with fulcrum years ahead, and already without the innocence of generations before. Among your first vivid memories at national scale was 9/11. News throughout all the days you know has focused on the tribulations of terror and war. In 2008, in the crush of adolescence, you saw the economy crash. And the Great Recession today can seem unending.

You know indeed that we live in hard times, with a future of vast possibility. With powerful desire, you want to be citizen leaders. You want the guidance, the wisdom, of this ancient institution, as it's been passed from generation to generation, leavened with new knowledge.

You ask to learn history that will be a guide to the perennial inroads against liberty and to how American might find peace at home; you ask to learn new languages and literature as a guide to our common humanity; to learn the psychology that gives humanizing insight for equity and equality; to learn the dynamic and rhythms of the art that gives peace and challenge to the soul; the finance that unlocks our way from debt and accelerates enterprise; the science that fuels our hope to explore the stars and to bring understanding, wonders, and solace throughout this world; you ask to learn the methods of education itself that will lift the generations to come.

Residential liberal arts education is one of the great revolutionary forces in all of history. The liberal arts of citizen leaders are for the challenges of free society, perennially the same, perpetually new, as when two millennia ago Cicero in a republic forbearer to our own in an era of gathering clouds first exhorted the liberal arts.

Who is ready to meet the challenge?

At one century and three quarters, Godspeed and thank you.



Taylor Reveley IV

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Tab 3



LONGWOOD LOOKING TO ITS THIRD CENTURY
-WHAT WILL ADVANCE THE UNIVERSITY-
Fall 2013

A. Dedication to key principles:

Academic Enterprise at the Heart – we are one of America’s hundred oldest colleges and universities, and Virginia’s third oldest public university, after William & Mary and UVa

Transforming Lives – we are at our best when helping to transform lives, by helping our students to truly realize their potential

Camaraderie – we enjoy a distinctive camaraderie, enriched by our many traditions; a camaraderie that gives us a distinctive advantage when working through challenges and challenging times

B. Focus on what most needs to be done:

Retention & Graduation – it is a moral imperative, and likewise catalytic from the standpoint of revenue and the spirit of the University

Renewing General Education – we can build a powerful curriculum, building on the liberal arts of citizen leaders, our unique assets such as Hull Springs, the LCVA, and nearby Moton, and our technology

National Marketing – institution-wide endeavor and marketing collaboration will make one of the fifty oldest NCAA Division I schools as well-known as it should be

Foot Traffic by Alumni and Friends – philanthropy and public support for the University hinge on visits to campus and in-person engagement, since those who see our beautiful campus love Longwood

Prosperity of One of America’s Oldest Two-College Communities – Farmville, HSC, Prince Edward, and Longwood stand together where the Civil War ended and Civil Rights began; we will thrive together

Strengthening the University Community – compensation must rise and opportunities for professional development must increase, and fostering diversity will enhance retention and hiring

Housekeeping, Structuring, and Governance – there has not been a full opportunity in almost two decades for a fresh look at how Longwood fits together and at our policies, practices, and data methodologies

C. Perspective on what we can become:

A Model for American Higher Education – few institutions in the country have Longwood’s potential to make great progress; we have kinetic energy without the entrenched views prevalent at many institutions

Mission: *Longwood University is an institution of higher learning dedicated to the development of citizen leaders who are prepared to make positive contributions to the common good of society. Building upon its strong foundation in the liberal arts and sciences, the University provides an environment in which exceptional teaching fosters student learning, scholarship, and achievement. As the only four-year public institution in south central Virginia, Longwood University serves as a catalyst for regional prosperity and advancement. Approved by the Longwood Board of Visitors, July 1997.*

Tab 4



Academic Affairs

Ken Perkins, Provost & Vice President

There have been a number of activities in the Academic Affairs area since our last Board of Visitors meeting. Below is a brief overview.

SACSCOC Update

Longwood is waiting anxiously for the report of the Southern Association of Colleges and Schools Commission on Colleges off-site committee evaluation of Longwood's Compliance Certification. This report should arrive by Thanksgiving. Longwood will have till early February to respond to any recommendations of the off-site committee. In March 2014, the on-site committee will visit. Dr. Timothy Mescon, president of Columbus State University, Columbus, Georgia, will be the chair of this committee. Dr. Naomi Yavneh, University of South Florida, will be the lead Quality Enhancement Plan evaluator. Work on the budget for the QEP is underway.

Dr. Perkins and Mrs. Kinman (SACSCOC Reaffirmation Director) were recently members of on-site committees.

Searches for Faculty and Administrators

Sixteen faculty candidates have interviewed in Academic Affairs during November with more to follow in December. Additionally, searches are underway for the Director of the Longwood Center for the Visual Arts (Dr. Carolyn Wells is chair of this search) and for the Dean of the Cook-Cole College of Arts and Sciences (Dr. Paul Barrett is chair).

Hull Springs Farm

Several faculty and administrators from Academic Affairs participated in interviews of firms interested in developing Hull Spring Farm's wetland mitigation bank. The selection process is continuing.

General Education Revision

A faculty team has been formed to lead revision of general education. Dr. Sharon Emerson-Stonnell is chair and Dr. Lara Ferguson is vice-chair. Other members include Lee Bidwell, Sarai Blincoe, Wade Edwards, Heather Lettner-Rust, Pam McDermott, Melissa Rhoten, and David Shoenthal from Arts and Sciences; Cheryl Adkins and David Lehr from Business and Economics; and David Locascio and Sharon Menegoni from Education and Human Services.

Greenwood Library Service Model Change

The Greenwood Library is undergoing a significant change in how it delivers service. Beginning in January 2014, Reference, Circulation/Reserve, and Multimedia Lab will be relocated to the Circulation/Reserves area to create a “one-stop shopping” model. Many libraries have been adopting this model over the last two decades (including Virginia Commonwealth University). Staff from Greenwood Library recently visited VCU. Implications are expected to be positive: less “bouncing” of patrons from desk to desk; less reactive waiting for students by librarians; and more time for librarians to assist students with in-depth research assignments.

Cormier Honors College Faculty Learning Community

The Cormier Honors College has launched the Faculty Learning Community project to consider best practices in integrative learning and Honors education, and to identify ways to enhance the current Honors student experience. Participating faculty, representing diverse academic disciplines, will work this year and next summer on this collaborative research effort.

Welcome of Chinese Teachers

International Affairs hosted a welcome reception for 20 teachers from China who are training at Longwood. The courses of study for these teachers are techniques for instruction of English as a second language and American Culture.

CAFÉ, DEC, and Library Collaboration

The Center for Academic Faculty Excellence (CAFÉ), The Digital Education Collaborative (DEC) and Greenwood Library are sponsoring the second annual faculty institute. This institute will focus on teaching for retention. Regarding retention, the DEC is assisting with training faculty advisors to use the new advising program DegreeWorks.

“Humans Being” and *Paradise Lost*

On a lighter note, the Department of English and Modern Languages is presenting “Humans Being” as a celebration of the Humanities this academic year. Programs have been and will continue to be held across campus. Recently, a number of faculty (current and retired) and students spent an entire Saturday reading aloud John Milton’s great poem, “Paradise Lost.”

Tab 5



Administration & Finance

Ken Copeland, Vice President

We were pleased to learn in early November that our submission to Moody's for an indicative bond rating was successful and Longwood University now has a published A1 bond rating. This rating will serve at least two valuable purposes: (1) it will help to edify our submission to the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) and show, from the perspective of an outside, objective third party, that the University is in very good financial health, and (2) it gives the University (and our affiliated foundations) another alternative for financing capital projects. We obviously can always use the bond program administered by the Commonwealth of Virginia, but the possibility of using our own credit rating will give us flexibility not usually afforded by the State, both in terms of timing and length of term. A copy of the rating letter is attached as an exhibit.

The Auditor of Public Accounts (APA) is currently engaged in the audit of Longwood's FY 2013 financial statements. APA is scheduled to complete its work by the end of December, and we will be able to present audited statements during the SACSCOC on-site visit this spring in connection with the reaffirmation process. The unaudited FY 2013 financial statements are attached for your review.

Also attached is a copy of our ARMICS (Agency Risk Management and Internal Control Standards) memo. One of the primary responsibilities of the Administration and Finance team is to ensure the University's assets are well protected; therefore, an ongoing system that evaluates internal controls is essential. In conjunction with our agency-level internal control assessment, we need to ask questions relative to integrity and ethical behavior. Such questions are used to assess the institution's control environment. A University Code of Ethics policy will help define expectations in that regard. Currently, University Policy 4110 - *Financial Operations Code of Ethics* applies only to the Administration and Finance area. The proposed Policy 1000 - *University Code of Ethics* would apply to the entire University and will help to communicate that everyone at Longwood has a duty to conduct their day-to-day activities in an ethical manner. Existing Policy 4110 - *Financial Operations Code of Ethics* will be deleted.

Another proposed policy change for consideration (Policy 4204) has to do with the threshold for capitalization of fixed assets. This policy is being updated to coincide with DOA requirements that state agencies are not required to control/track assets valued at less than \$5,000. Longwood's existing policy states our controllable threshold to be \$2,000. Modifications to this policy will coincide with DOA requirements and also lessen inventory tracking which will free up personnel hours that could be dedicated to other endeavors.

The Finance area continues to monitor Longwood's fiscal performance and financial resources. To that end, we have provided a Statement of Revenues and Expenditures for E&G and

Auxiliary activities, comparing budget and actual data as of October 31, 2013. Cash Reserve Analysis and Planned Reserve Expenditures reports are also provided.

Budget planning for the 2014-2015 fiscal year has begun. The University Planning Council (UPC) has met twice this fall and all of the respective reporting units on campus have been diligently working to identify fixed cost increases and anticipated programmatic changes for the academic year that will begin on July 1, 2014. We will hear from Governor McDonnell on December 16th when he presents his budget recommendations to the General Assembly, and we are anxious to learn what fixed cost increases will be proposed for higher education agencies, specifically the amounts pertinent to health care and retirement costs. We are hopeful these increases will be minimal, but we certainly do anticipate increases that could significantly impact both our E&G and Auxiliary budgets.

We are proposing, for Board of Visitors approval, housing and dining rates for the next academic year. In previous years, students have had to sign up for housing before these rates were approved at the March board meeting. Overwhelmingly, the main concern raised every year by students is signing up for housing before they know what the cost is going to be. This is a departure from the previous practice; however, we believe it is a student-friendly change and one that will be appreciated by all of those who will ultimately seek housing outside the boundaries of the main campus. Rates for tuition and fees will be brought to the board in March, as has been the practice in past years.

Finally, we are in the process of conducting a search to fill a vacancy in the office of the Director of Materiel Management upon Jim Simpson's retirement in September. Interviews are to be conducted on November 22nd and we hope to have a new director in place early in calendar year 2014.

MOODY'S
INVESTORS SERVICE

7 World Trade Center
250 Greenwich Street
New York 10007
www.moodys.com

November 18, 2013

Mr. Ken Copeland
Longwood University
201 High Street
Farmville, VA 23909

Dear Mr. Copeland:

We wish to inform you that Moody's Investors Service has assigned an initial issuer rating of **A1** with a **stable** outlook to Longwood University.

In assigning such rating, Moody's has relied upon the truth, accuracy and completeness of the information supplied by you or on your behalf to Moody's. Moody's expects that you will, on an ongoing basis, continue to provide Moody's with updated information necessary for the purposes of monitoring the rating, including current financial and statistical information.

Moody's will monitor this rating and reserves the right, at its sole discretion, to revise or withdraw this rating at any time in the future.

The rating, as well as any revisions or withdrawals thereof, will be publicly disseminated by Moody's through normal print and electronic media and in response to verbal requests to Moody's Rating Desk.

Should you have any questions regarding the above, please do not hesitate to contact the analyst assigned to this transaction, Mary Kay Cooney at 212-553-7815.

Sincerely,

Moody's Investors Service, Inc

Moody's Investors Service, Inc.

cc: Greg Fawcett
Piedmont Securities
215 S. Main Street
Suite 304
P.O. Box 2060
Davidson, NC 28036-2060

LONGWOOD UNIVERSITY
Statement of Revenues and Expenditures
For Period Ending October 31, 2013

	BOARD APPROVED ORIGINAL BUDGET	YEAR TO DATE ADJUSTMENT	REVISED BUDGET FORECAST 2013-2014	ACTUAL TO DATE 2013-2014	ACTUAL AS PERCENT OF BUDGET	PRIOR YEAR COMPARATIVE	
						ACTUAL TO DATE	ACTUAL AS PERCENT OF BUDGET
EDUCATIONAL AND GENERAL							
REVENUES:							
Tuition	32,216,571	219,929	32,436,500	14,340,055	44.21%	12,521,526	42.10%
Fees	1,910,701	8,324	1,910,701	1,114,336	58.32%	1,297,825	59.56%
State General Fund Appropriation	24,335,168	8,324	24,343,492	8,908,874	36.59%	8,697,013	36.97%
Other Sources	239,500	2,489	241,989	112,795	46.61%	85,586	35.05%
Federal Work Study	50,000	-	50,000	-	0.00%	-	0.00%
TOTAL REVENUES	58,751,940	230,742	58,982,682	24,474,060	41.49%	22,601,950	40.53%
EXPENDITURES:							
Instruction	28,926,866	(277,663)	28,649,203	10,128,259	35.35%	9,265,158	34.15%
Public Service	506,388	25,666	532,054	144,329	27.13%	163,387	33.79%
Academic Support	10,234,527	208,661	10,443,188	3,417,884	32.73%	2,883,775	29.73%
Student Services	4,286,803	(1,717)	4,285,086	1,454,582	34.10%	1,500,257	36.08%
Institutional Support	8,806,963	606,077	9,413,040	3,193,316	33.92%	3,432,152	38.31%
Operation and Maintenance of Plant	6,410,393	(432,011)	5,978,382	2,141,070	35.81%	1,929,655	34.51%
Salary Savings	(400,000)	-	(400,000)	(216,409)	54.10%	(164,429)	27.40%
TOTAL EXPENDITURES	58,751,940	129,012	58,880,952	20,262,981	34.41%	19,009,955	34.67%
Revenues Over/(Under) Expenditures			101,730	4,211,079		3,591,985	
AUXILIARY ENTERPRISE							
REVENUES:							
Housing Fee and Sales	18,603,824	600,000	19,203,824	10,086,879	52.53%	8,808,532	51.76%
Dining Fee and Sales	8,616,874	-	8,616,874	4,456,651	51.72%	4,058,878	47.50%
Comprehensive Fees/Other	20,409,200	588,643	20,997,843	10,675,710	50.84%	10,335,164	52.82%
Federal Work Study	154,300	-	154,300	-	0.00%	-	0.00%
TOTAL REVENUES	47,784,198	1,188,643	48,972,841	25,219,439	51.50%	23,202,574	51.27%
EXPENDITURES:							
Housing Services	18,397,421	143,895	18,541,116	5,566,006	30.02%	4,311,519	26.27%
Dining Services	7,864,991	445,772	8,310,763	2,796,227	35.55%	2,094,959	25.21%
Athletics	8,322,037	23,896	8,345,933	4,067,037	46.35%	3,667,188	46.21%
Other Services	10,293,838	-	10,293,838	5,420,949	52.76%	4,836,999	49.88%
Salary Savings	-	-	-	-	0.00%	-	0.00%
TOTAL EXPENDITURES	44,878,287	613,163	45,491,450	17,850,218	39.24%	15,180,665	36.39%
Revenues Over/(Under) Expenditures	2,905,911	575,479	3,481,391	7,369,221		8,021,909	

¹ YTD adjustment reflects tuition adjustment to actual
² Includes registration fees, course/interimship fees, on-line fees; ESL program fees, application fees and out-of-state capital fees.
³ Includes facility rentals, library fines, payment plan registration income, post office revenue, administrative fees and indirect cost recoveries
⁴ YTD adjustments reflect additions, transfers between programs and insurance pre-payment
⁵ YTD adjustments reflect additions or transfers between programs
⁶ Advance of meal plan costs per new ARAMARK contract

One-time surplus available for reallocation
Anticipated addition to reserves

Note: these statements reflect working papers with audit still in process by Virginia Auditor of Public Accounts

Longwood University
STATEMENT OF NET POSITION
As of June 30, 2013

ASSETS	Component Unit		Component Unit	
	Longwood University	Longwood University Foundation, Inc.	Longwood University Real Estate Foundation	
Current assets:				
Cash and cash equivalents (Note 3)	\$ 47,559,568	\$ 9,191,173	\$ 130,957	
Securities Lending - Cash and cash equivalents (Note 3)	4,283,539	-	-	
Short-term investments (Note 3)	230,958	-	-	
Accounts receivable, net of allowance \$131,476 (Note 4)	1,342,794	-	253,525	
Notes receivable	160,068	-	294,374	
Contributions receivable, net (Note 19)	-	354,140	-	
Due from the Commonwealth (Note 5)	1,850,511	-	-	
Inventory	414,347	-	-	
Prepaid expenses	2,427,724	11,384	24,591	
Total current assets	58,269,509	9,556,697	703,447	
Noncurrent assets:				
Restricted cash and cash equivalents (Note 3)	6,770,479	183,818	-	
Restricted Appropriations Available/Due From Commonwealth	335,184	-	-	
Unrestricted Investments	-	16,082,889	-	
Restricted Investments	-	32,242,055	3,479,811	
Other non-current assets	-	102,091	260,347	
Notes receivable, net of allowance of \$99,690	964,879	-	-	
Contributions Receivable, net (Note 19)	-	4,546,542	-	
Non-depreciable capital assets, net (Note 6)	21,192,322	5,361,506	33,509,815	
Depreciable capital assets, net (Note 6)	190,115,441	1,226,655	35,869,408	
Total noncurrent assets	219,378,305	59,745,556	73,119,381	
Total assets	\$ 277,647,814	\$ 69,302,253	\$ 73,822,828	
LIABILITIES				
Current liabilities:				
Accounts payable and accrued expenses (Note 7)	8,399,367	223,788	3,222,832	
Line of Credit	-	-	4,920,212	
Deferred revenue	1,838,176	-	-	
Obligations under securities lending	4,514,497	-	-	
Deposits held in custody for others	579,059	-	-	
Long-term liabilities - current portion net of deferred loss of \$248,549 (Note 8)	4,565,442	19,495	827,802	
Total current liabilities	19,896,541	243,283	8,970,846	
Noncurrent liabilities - net of deferred loss of \$2,338,317 (Note 8)	54,264,214	1,175,974	80,598,292	
Total liabilities	\$ 74,160,755	\$ 1,419,257	\$ 89,569,138	
NET POSITION				
Invested in capital assets, net of related debt	157,213,346	6,568,666	(1,937,235)	
Restricted:				
Nonexpendable:				
Permanently restricted	-	32,493,768	-	
Expendable:				
Loans	395,290	-	-	
Temporarily restricted	-	21,552,760	-	
Other	966,924	-	-	
Unrestricted	44,911,499	7,267,802	(13,809,075)	
Total net position	\$ 203,487,059	\$ 67,882,996	\$ (15,746,310)	

The accompanying notes to financial statements are an integral part of this statement.

Longwood University
STATEMENT OF REVENUES, EXPENSES, AND CHANGES IN NET POSITION
For the Year Ended June 30, 2013

	Component Unit		Component Unit	
	Longwood University	Longwood University Foundation	Longwood University Real Estate Foundation	
Operating revenues:				
Student tuition and fees, Net of scholarship allowances of \$2,914,591	\$ 29,082,884	\$ -	\$ -	
Gifts and contributions	-	6,068,662	-	
Federal grants and contracts	2,615,279	-	-	
State grants and contracts	493,039	133,863	-	
Nongovernmental grants and contracts	2,846,634	-	-	
Auxiliary enterprises, net of scholarship allowances of \$3,905,416	43,110,498	-	-	
Other operating revenues	382,256	417,114	6,051,580	
Total operating revenues	78,530,590	6,619,639	6,051,580	
Operating expenses (Note 13)				
Instruction	29,677,596	-	-	
Research	244,567	-	-	
Public service	1,492,107	-	-	
Academic support	6,796,136	-	-	
Student services	4,143,338	-	-	
Institutional support	8,706,400	1,820,767	775,251	
Operation and maintenance - Plant	8,003,087	-	2,387,592	
Depreciation	9,288,764	-	1,875,773	
Amortization	897,065	-	1,177,922	
Student aid	8,948,873	1,239,046	-	
Auxiliary activities	34,029,423	-	-	
Administrative and fundraising	-	799,917	-	
Other expenditures	18,273	-	22,576	
Total operating expenses	112,245,629	3,859,730	6,239,114	
Operating gain (loss)	(33,715,039)	2,759,909	(187,534)	
Nonoperating revenues (expenses):				
State appropriations (Note 12)	28,117,798	-	-	
Pell Grant Revenue	4,152,728	-	-	
Insurance Revenue	47,389	-	-	
Investment revenue	1,172,846	845,607	18,205	
Interest on Capital Asset-Related Debt	(2,726,305)	-	(2,291,427)	
Unrealized gain on swap	-	-	381,994	
Decrease in split interest agreements	-	(124,169)	-	
Realized gain on investments	-	1,334,450	-	
Unrealized gain on investments	-	2,899,406	-	
Loss on disposal/sale of plant assets	(184,842)	-	(5,055)	
Net nonoperating revenues	30,579,614	4,955,294	(1,896,283)	
Income (loss) before other revenues, expenses, gains or losses	(3,135,425)	7,715,203	(2,083,817)	
Contributions to permanent endowments	-	692,040	-	
Contributions to term endowments	-	1,494,300	-	
Capital appropriations	12,359,093	-	-	
Other Gifts	47,314	-	-	
Net other revenues	12,406,407	2,186,340	-	
Increase (decrease) in net position	9,270,982	9,901,543	(2,083,817)	
Net position - Beginning of year	194,216,077	57,981,453	(13,662,493)	
Net position - End of year	\$ 203,487,059	\$ 67,882,996	\$ (15,746,310)	

The accompanying notes to financial statements are an integral part of this statement.

Longwood University
STATEMENT OF CASH FLOWS
For the Year Ended June 30, 2013

Cash flows from operating activities:	
Student tuition and fees	\$ 29,239,167
Grants and contracts	5,863,772
Auxiliary enterprises	43,082,284
Payments to employees	(57,929,372)
Payments to suppliers and utilities	(24,785,093)
Payments for operation and maintenance of facilities	(10,910,446)
Payments for scholarships and fellowships	(8,948,873)
Collection of loans to students	8,070
Other operating receipts	385,297
Payments for other expenses	<u>(19,579)</u>
Net cash provided (used) by operating activities	<u>(24,014,773)</u>
Cash flows from noncapital financing activities:	
State appropriations	28,293,707
Other non-operating	4,152,728
Change in agency balances	<u>52,442</u>
Net cash provided (used) by noncapital financing activities	<u>32,498,877</u>
Cash flows from capital and related financing activities:	
Capital appropriations	12,379,665
Acquisition and construction of capital assets	(13,484,916)
Proceeds from capital debt	244,077
Principal paid on capital-related debt, leases, and installments	(3,366,437)
Interest paid on capital-related debt, leases, and installments	(2,550,055)
Insurance payments	<u>47,389</u>
Net cash provided (used) by capital and related financing activities	<u>(6,730,277)</u>
Cash flows from investing activities:	
Investment/interest revenue	<u>578,429</u>
Net cash provided (used) by investing activities	<u>578,429</u>
Net increase (decrease) in cash	2,332,256
Cash and cash equivalents - Beginning of the year	<u>52,332,975</u>
Cash and cash equivalents - End of the year	<u>\$ 54,665,231</u>

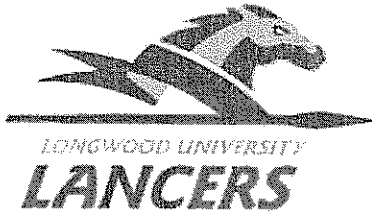
The accompanying notes to financial statements are an integral part of this statement.

Longwood University
STATEMENT OF CASH FLOWS
For the Year Ended June 30, 2013

RECONCILIATION OF NET OPERATING LOSS TO NET CASH
USED BY OPERATING ACTIVITIES:

Operating gain (loss)	\$ (33,715,039)
Adjustments to reconcile net loss to net cash used by operating activities:	
Depreciation and amortization expense	10,185,829
Changes in assets and liabilities:	
Receivables, net	(85,221)
Inventory	79,588
Prepaid expenses	(559,073)
Notes receivable, net	8,070
Accounts payable and accrued expenses	(202,551)
Deferred revenue	160,898
Deposits payable	52,442
Accrued compensated absences	<u>60,284</u>
Net cash provided (used) by operating activities	<u>\$ (24,014,773)</u>

The accompanying notes to financial statements are an integral part of this statement.



MEMORANDUM

To: Ken Copeland
Vice President for Administration and Finance

From: Tracy Nelson ^{TN}
Assistant Vice President for Financial Operations

Date: November 19, 2013

Subject: ARMICS Internal Control Evaluation

An effective system of internal control provides accountability for meeting program objectives, promotes operational efficiency, improves the reliability of financial statements, strengthens compliance with laws and regulations, and reduces the risk of financial losses due to fraud, waste or abuse.

The Commonwealth's Agency Risk Management and Internal Control Standards (ARMICS) require all state agencies to demonstrate that internal control standards have been implemented and annually assess internal control systems to ensure fiscal accountability and the safeguarding of assets. These standards require agencies to (1) develop, implement and maintain adequate internal control over the recording of financial transactions, compliance with the Commonwealth's financial reporting requirements, compliance with laws and regulations, and stewardship over the Commonwealth's assets; (2) periodically assess the adequacy of internal control and identify needed improvements; (3) take corresponding preventative and corrective actions; (4) report annually on internal control to the Office of the State Comptroller; and (5) take action to remediate any deficiency noted by the Department of Accounts or Auditor of Public Accounts.

Longwood's management is responsible for the integrity of its financial transactions and establishing and maintaining an effective system of internal control. The following measures were taken to assess the University's internal controls over fiscal activities for the fiscal year ended June 30, 2013.

Payment Card Industry (PCI) Compliance:

- The University's PCI Compliance Team monitors credit card activities of the institution. Longwood's credit/debit card security policy and procedures assist its merchants in maintaining compliance with industry standards governing credit card transaction processing. All University merchants successfully passed PCI compliance certification.

Fixed Assets and Equipment Trust Fund (ETF):

- The fixed assets accountant ensured that the University adhered to all guidelines relative to ETF purchases.
- No restatement of beginning fixed asset balances was required in FY 2013 or FY 2012. This is attributable to improvements in the design and operation of internal controls over fixed assets and related processes.
- The annual inventory was performed, and samples were taken from each departmental inventory to verify accuracy. The fixed assets database was updated appropriately. CARS and Banner reports were reviewed monthly to ensure the appropriate items were captured in the fixed assets database. Training was provided to departmental inventory custodians to ensure their familiarity with processes and forms and to emphasize the importance of prudent management of University assets.

Human Resources – I-9 Forms:

- Previous audits revealed that the Employment Eligibility Verification I-9 forms were not properly completed in accordance with guidelines. Since that time, the University conducted I-9 compliance training and the Human Resources Office provided documentation on its website to assist in the process of I-9 completion. Sample testing revealed no internal control weaknesses.

Financial Aid:

- Pell grant awards were reviewed. Sample testing revealed no internal control weaknesses; student Pell award amounts were appropriate for credit hours enrolled and expected family contribution.

Journal Entries:

- A random sample of journal entries was reviewed to verify that documents (1) were properly signed and approved, (2) were properly completed with appropriate supporting documentation, and (3) corresponded to Banner postings. No internal control weaknesses were identified in this review.

Banner Security Access:

- The University received a recommendation from APA to strengthen its Banner security access review process. During FY 2013, improvements were made to include (1) use of GUVUACC to conduct reviews, (2) identification of critical forms, (3) review of class and form access, (4) review of direct and class assignments, (5) review of conflicting roles, and (6) removal of forms not utilized. The new process was discussed with data owners. These improvements strengthened our Banner security access review process.

Revenue:

- A random cash count of each of the cash collection areas was performed as part of the FY 2013 ARMICS test work. Reconciliations of deposits made by each cash collection site to Banner were reviewed.

Reconciliations:

- Monthly cash, revenue and expense reconciliations were performed, and certifications were submitted to the Department of Accounts as required. Banner financial data was reconciled to CARS data. Testing revealed appropriate supporting documentation was present and that variances were identified, adequately explained and corrected.
- Fall and Spring room and board charges in Banner were reconciled to the RMS Housing system and the C-Bord meal plan system. A new process was implemented in FY 2013 whereby data is received directly from each system, as opposed to being transmitted by the respective department.
- Contract income was monitored to ensure that revenues were received in accordance with contract terms. Contract income includes Barnes & Noble bookstore commissions, washer/dryer commissions, vending commissions, ARAMARK catering commissions and Dell computer repair reimbursements.

Financial Statements:

- Longwood University turned in all FY 2013 attachments and supplemental information to the Department of Accounts timely and accurately. The University received two management recommendations relative to its FY 2012 audit: (1) improve review and preparation of financial statements and (2) Oracle database security. Additional financial statement reviews were implemented during the FY 2013 financial statement preparation, including the use of a review checklist. These additional reviews are designed to strengthen the financial statement preparation process and their reliability.

It is concluded that Longwood's internal control systems are functioning appropriately. No significant weaknesses were identified in internal control processes that were reviewed and tested during FY 2013. The Financial Operations division is very much aware of the importance of appropriate internal controls, and is governed by Administrative Policy 4110 – Financial

LONGWOOD UNIVERSITY

PROPOSED HOUSING & DINING FEES 2014-15

	2013-2014	2014-2015
Housing		
Main Campus-Double	\$ 5,856	\$ 6,148
Main Campus-Triple	\$ 5,856	\$ 6,148
Main Campus-Single	\$ 6,856	\$ 7,148
Lancer Park-Quads	\$ 6,810	\$ 7,150
Lancer Park-Doubles	\$ 6,940	\$ 8,084
New Lancer Park-Quads	\$ 7,594	\$ 7,974
New Lancer Park-Doubles	\$ 7,040	\$ 8,084
New Lancer Park-Singles	\$ 8,284	\$ 8,698
Longwood Village	\$ 7,054	\$ 7,406
LU Landings-Quads	\$ 7,594	\$ 7,974
LU Landings-Singles	\$ 8,284	\$ 8,698
Dining		
14 + \$250	\$ 3,020	\$ 3,108
Unlimited + \$150	\$ 3,728	N/A
19 + \$150	N/A	\$ 3,800
Block 160 + \$200	\$ 2,798	N/A
Block 160 + \$300	N/A	\$ 3,082
10 + \$350	\$ 2,866	\$ 3,132
Block 80 + \$250	\$ 1,986	N/A
Block 80 + \$300	N/A	\$ 2,138

PROPOSED COURSE FEE 2014-15

	2013-2014	2014-2015
Longwood Seminar – PLUS (LSEM 100-60-61-62-63-64)	\$350	\$ 400

Tab 6



Commonwealth Relations *Brenda Atkins, Vice President*

Governmental Affairs

In September Longwood asked Governor McDonnell to include funding for the following items, which are based on Longwood's Six-Year Institutional Plan, in his 2014-2016 Biennium Budget:

- Base Adequacy
- Retention & Graduation
- Enhance Student Success
- Faculty Positions; Faculty, AP and Classified Equity, Retention & Promotion Pool
- Five-Year Masters in Math/Science Secondary Teaching
- Expand the Cyber Security Initiative
- Develop RN to BSN Program

Since submitting this information for the Governor's Budget, the Higher Education Advisory Committee (HEAC) met and recommended that that 50 percent of funding that would go to higher education would go to support base operations and financial aid (and could be used for faculty salaries if an institution wanted). The other 50 percent would be used for incentive funding such as enrollment, degrees awarded and TJ21 items. Governor McDonnell will release his budget on December 16 and we will know at that time if our requests have been funded.

On October 24, Longwood University hosted the Prince Edward County Legislative Luncheon on campus. Prince Edward County, the Town of Farmville, Hampden-Sydney College, Prince Edward County Schools, Centra Southside Community Hospital and Longwood all participated. Delegate Edmunds attended the meeting and Paul Allen, Senator Garrett's legislative aide, attended (Senator Garrett was in Court, but did arrive as the meeting was winding down). President Reveley spoke of the importance of retention and graduation rates and the importance to Longwood, Hampden-Sydney, the Town of Farmville, and Prince Edward County of making VA 307 a four-lane road. Safety on this highway is a major concern. President Reveley followed up with a letter to the Honorable Sean T. Connaughton, Secretary of Transportation, outlining our concerns and request that the Commonwealth Transportation Board consider making VA 307 a four-lane road.

The General Assembly Session will open on January 8th and run through March 8th. Once we see what is in the Governor's budget, the President will decide what amendments we will be seeking. President Reveley and I will be meeting with all of the legislators on the appropriate committees asking their support of Longwood's amendments. In celebration of Longwood's 175th anniversary, Longwood will host a legislative reception on February 17 from 6-8 p.m. at the Library of Virginia. Please put this on your calendars! We will also have a display in the General Assembly Building from February 17-20.

University Advancement

Longwood University hosted a campaign finale celebration on Saturday, September 16. A grand total of \$41.1 million was announced including \$9.2 million for scholarships and \$7.9 million for faculty and academic support. The evening was highlighted by the celebration of Mrs. Elsie Upchurch '43 and her gift of \$4 million to support the new Upchurch University Center and the \$2.5 million gift from Katharine Maugans '46 to support the Maugans Alumni Center.

Longwood has realized a significant increase in cash received for the first four months of the fiscal year. Longwood received \$1,876,070 versus \$702,064 for the same period last fiscal year. Significant gifts received included a \$640,000 gift from 1937 alumnae from Mechanicsville and a \$28,000 undergraduate research endowment from a former student from Richmond. The Longwood telefund realized great success. During eight weeks of calling, our 22 Longwood student callers attempted 54,296 calls. They successfully received 2,844 pledges (surpassing the semester goal of 2,600) for a total of \$185,639 (surpassing the semester goal of \$175,000). Two student callers in particular were very successful. One caller, a senior elementary education major from Colonial Heights raised \$29,630 this semester (her three year total is \$70,382) and another caller, a senior finance major from Prince George raised \$16,962. The Longwood direct mail program is also underway. Longwood solicited just over 10,000 alumni in a fall appeal and also mailed to all President's Circle members. Also completed was a mailing to over 2,500 planned giving prospects from the classes of 1972 and before. University Advancement hosted a New York City reception for President Reveley and an on-campus retiree's reception also featuring President Reveley. In the coming months, presidential travel is planned for Florida, Arizona, and several Virginia locations and specific events are planned for McLean, Richmond, and Virginia Beach.

Corporate and Foundation Relations

Newly established by President Reveley in September, the Office of Corporate and Foundation Relations is in an assessment and building year. It is expected to achieve full capacity within 36 months, which will include a full strategic plan that aligns directly with the goals of the President and a guaranteed base of \$2-4 million (2013 total corporate and foundations gifts were approximately \$600,000—not including individual foundations and matching gifts). Actions will include a comprehensive process and data review, coordination of campus-wide efforts, internal and external communications plan including improved evangelism via web and printed materials, and the creation of a viable, actionable lead list from approximately 100 to 150 within one year. This is a comprehensive effort that will touch all colleges and centers/institutes in the University. In addition to maintaining relationships with current partners, as of January, we will have close to \$1 million in new proposals in the pipeline with a goal of \$2 million in the pipeline of pending projects at the end of fiscal year 2014. Among work toward significant gifts from Bank of America, Media General and the Jessie Ball DuPont Fund, we are in talks with the Folk Art Society of America to transfer the assets of their organization to the University (including an endowment, archives, out of print books and publications, an educational journal, and a national donor base of approximately 450).

Major Programs

With the goal of increasing VIP foot traffic on campus, the Office of Major Programs has focused on hosting and planning events that will attract alumni, community members, and current and potential donors to campus. The office hosted five stewardship events this semester, including dinners, receptions and luncheons, which involved 75 alumni, donors and campus representatives, around such campus programs as the American Shakespeare Center visit, the Chamber Music Series, and the inaugural C. G. Gordon Moss lecture.

The office planned and advertised a trip to London in March 2014 for alumni and friends, hosted by Dr. Jim Jordan and Dr. Brian Bates. We are also working with Academic Arrangements Abroad to begin a presidential travel program that will offer one international trip with President Reveley each year. The first trip being planned is for Cuba in March 2015 and will start being advertised next spring.

The Longwood Leadership Forum speaker series will hold its inaugural season in Spring 2014. The series will highlight outstanding examples of leadership in multiple disciplines. The series will kick-off with Jeff Schapiro, political columnist for the *Richmond Times-Dispatch*, on January 23. Other speakers include Richard and Kathy Verlander, parents of Detroit Tigers pitcher Justin Verlander; Meg Gruber, President of the Virginia Education Association; Dean King, author of the book "The Feud" about the Hatfields and the McCoys; and Teri Kanefield, author of a young person's book about Barbara Johns that was researched in Farmville. Other speakers may be added to the lineup, including a special guest for Longwood's 175th Anniversary.

Diane Easter, Director of Major Programs, continues to co-chair Longwood's 175th Anniversary Committee with Nancy Shelton, Director of Alumni Relations. Anniversary events planned for the spring semester include a Longwood House open house; faculty/staff celebration on March 5; week-long celebration for students; community celebration at the Small Business Expo; publication of a pictorial history; and special giveaways on campus throughout the semester.

Conferences & Scheduling

Conferences & Scheduling and A/V Services has changed its name to Conference & Event Services. This name better defines the functions and core services for both internal and external event planners. As part of this change we are currently working with Public Relations to develop a unique logo that reflects our services and Longwood University as a whole. Our re-branding is also under development through an ad designed by two of our staff members that headlines with "*Classic Southern Hospitality IN THE HEART OF VIRGINIA*" and references us as a One Stop Shop. This ad will be included in the Winter College Edition of the Unique Venues magazine, which is distributed in print version to well over 2,000 event and meeting planners, and thousands more through the Unique Venues website. The conference staff members are busy preparing for two new conferences scheduled for January and February of 2014 while moving forward to fill the summer conference calendar. All of the large long term conferences are returning in 2014, and several new ones are in negotiations.

The A/V department has been very busy this semester working with Longwood departments, faculty and staff in creating, shooting and editing on-line classes, student performances, and individual presentations in the recording studio. Their most recent major accomplishment is the recording and sound management of President Reveley's Inauguration. Additionally, the event team members, who worked on the Inauguration, were also extremely pleased.

Tab 7



Athletics

Troy Austin, Athletics Director

The basketball season has kicked off in grand fashion thanks in part to great support of all Longwood students and University constituents.

The Lancer Lunatics, Longwood Student Government Association, Longwood Dining, and Lancer Productions and athletics department partnered together to present Lancer Madness on October 30. The event was free to all students and the general public and featured a shooting competition with members of the team and student body, a slam dunk contest and the introduction of both basketball teams. The proceedings attracted nearly 1000 enthused spectators.

As of November 19, both men's and women's basketball teams have winning records, including a victory over Big XII member Texas Christian University in men's basketball and in-state rival William & Mary in women's basketball. Both basketball teams get into the heart of Big South Conference play in January and February before the BSC Championships March 4-9, hosted by Coastal Carolina University in Conway, South Carolina.

Taking a look back, the fall sport season provided great highlights for the Lancers as well as all teams advanced to their respective conference tournaments, including semifinal appearances by field hockey and men's soccer. The men's soccer team posted a 6-3-1 conference record and 7-9-4 overall record under the direction of Big South Conference Coach of the Year Jon Atkinson, advancing to the semifinals of the Big South Tournament. The Lancers were led offensively by Anthony Ugorji with six goals and one assist on the season. Sophomore Philip van Berkom was named Second Team All-Big South Conference at midfield and earned All-Academic Team honors while classmate Rhys Cairns was recognized as an alternate on the All-Conference Second Team.

The women's soccer team finished with an 8-3 conference record and 9-9-2 overall record under head coach Todd Dyer '93. The squad finished third in the Big South regular season and advanced to the quarterfinals of the tournament. The Lancers were led offensively by the Big South Women's Soccer Freshmen of the Year, Amanda Spencer, with nine goals and three assists. Senior Kelsey Pardue was selected to the All-Conference First Team, while Spencer and Gina D'Orazio were each selected to both the All-Conference Second Team and the All-Freshman Team.

The field hockey team finished the season with a 10-12 overall record and third-place finish in the Northern Pacific Field Hockey Conference tournament under sixth-year head coach Iain

Byers. The Lancers were led offensively by senior standout Stacey de Grandhomme, who earned National Field Hockey Coaches Association All-South Region First Team recognition for the second straight season, in addition to NorPac East Division Player of the Year and a spot in the NFHCA All-Star game. De Grandhomme completed her outstanding career with 54 goals, which ranks second in the Longwood record books.

Head coach Catherine Hanson guided the men's cross country team to a seventh place finish in the 2013 Big South Championship. Junior Nick Reed set a new 10K school record of 32:58 to lead the Lancers at the NCAA southeast regional. Freshmen Robert Willis led the Lancers with an 8K time of 27:54 at the 2013 Big South Championship hosted by VMI. Russell Reed was named to the 2013 Big South Men's Cross Country All-Academic Team.

The women's cross country team finished eleventh in the Big South Championship meet. Brittany Foote led the team at both the NCAA southeast regional and Big South Championship with a 6K time of 23:45 and 5K time of 20:18. Emily Krause was named to the 2013 Big South Women's Cross Country All-Academic Team.

While the student-athletes have enjoyed success in competition, they have also stayed busy off the field. *Taking Charge: Reading With The Lancers* is a new reading incentive program for local elementary schools. Student-athletes and Elwood visit the schools and read a story. Every child receives an Elwood bookmark for participating. Additionally, each school has assigned a reading goal for their students to reach. Upon completion of the goal, the student will receive a free ticket to a Longwood Basketball game. Six schools are taking part in this program in its inaugural year: Prince Edward Country Elementary, Cumberland Elementary, Crewe Primary School, Burkeville Elementary, Buckingham County Primary School, and Buckingham County Elementary School. Overall there are approximately 3,000 area students participating in the program.

CJ Roth (Baseball), Megan McCracken (Women's Golf), Jenna Weyant (Women's Lacrosse), and Taylor Cave (Women's Soccer) attended the Big South Conference Leadership at the end of July in Black Mountain, North Carolina. The event is in its eighth year and provides leadership tools for student-athletes to utilize for the team and Athletics Department. It also gives them a chance to interact with student-athletes from other conference institutions away from the heat of competition.

Once the school year got started, the Student-Athlete Enhancement staff and the Student-Athlete Advisory Committee assembled the Student-Athlete kickoff, complete with a dodgeball tournament. This event allowed the student-athletes, coaches and staff members to "team-up", celebrate the start of the year with individuals from other programs, while having a good time getting to know each other. An important part of being a student-athlete is education, which happens every day in the class room.

Tab 8



Student Affairs

Tim Pierson, Vice President

There are a number of viewing points when attempting to gain a perspective on campus each semester. While the read might be very different from each point—they are all partially accurate. The student learning experience is a complex array of activities, challenges, and successes. The student affairs report offers a brief capsule from various offices that intersect with students that may offer one a fair takeaway of the journey during the fall semester 2013.

Assistant Vice President Report

Assessment related:

In congruence with the university goal of enhancing student retention and graduation rates, the following projects have been prioritized:

1. Developing customized reports from the Noel-Levitz Student Satisfaction Inventory.
2. Devising an effective marketing plan for spring 2014 administration of the National Survey of Student Engagement (NSSE).
3. Constructing a template for annual reports to include progress on strategic initiatives and student learning.

Professional Development related:

The AVPSA is coordinating efforts among the Café Director, LU Staff Professional Development Committee, and the Student Affairs Professional Development Team to provide extensive professional development opportunities. Once feedback is received on the Compliance report from the SACS staff, all Student Affairs staff and selected students will be well versed on key issues including the QEP in preparation for the upcoming on-site visit in March 2014.

Counseling and Health Centers

The Counseling Center and the Health Center have both seen a high number of students in their services this semester. The flu vaccination program from the Health Center continues to be a success as well as the Food For Thought by the Counseling Center. Nursing and Counseling students continue to learn valuable skills and experiences through practicums and volunteer hours in both offices. Also, The Counseling Center and Health Center have both requested additional staff to meet the needs of our growing university, which would stretch the facility's resources available to them in the wellness suite of the Health & Fitness Center. The process of investigating a satellite location or moving one of the offices to another location has begun, but space and personnel will be needed soon to continue to meet our campus needs.

Dean of Students

The Office of the Dean of Students and Residential and Commuter Life (RCL) have seen an increase in the number of behavioral issues and the numbers of students in crisis. A total of 366

students have been referred to the Care Team during the fall semester. In comparison, 491 students total were referred throughout the entire 2012-13 school year. As of 11/15/13, the RCL central office has managed 1655 incidents—168 more than the entire Fall 2012 semester. Major roommate conflicts and crises involving on call counseling staff are down. However, relationship violence, psychiatric issues requiring medical leave, and students without homes are up.

Disability Resources

The Office of Disability Resources has seen an increase in students utilizing services. The most time consuming situations involve the growing numbers of students who are registered for issues involving Autism Spectrum Disorder. The other growing issue involves students requesting foreign language class waivers due to learning and other disabilities. Students can only receive a waiver if medical tests prove that there is a disability or the student makes a real effort with appropriate accommodations that prove unsuccessful.

Diversity and Inclusion

The programs and services of the Longwood University Office of Diversity and Inclusion collaboratively builds an inclusive intercultural campus environment where student learning and development are strengthened by providing transformative educational activities designed to assist in the creation of citizen leader allies who understand, and value the importance of diversity in today's global society. The staff directly advise or provide support to 14 student clubs and organizations serving the needs of ethnic and racial minority group, sexuality groups, and social justice groups.

ODI sponsored Black Alumni Weekend. This event serves to keep African American Alumni connected to Longwood University, and many returned to their Alma Mater to share fellowship and reconnect. In November the office staff sponsored a Cultural Immersion trip to the Mattaponi and Pumunkey National American Reservations, and in November the staff sponsored a "Get on the Bus" graduate school tour for students to tour Virginia Commonwealth University. Finally, the office continues to support Admissions programming designed to increase students of color populations on campus through Diversity Day and Crash on Campus.

Emergency Management

A university review is currently underway to identify where the department of Environmental Health and Safety best serves the university. The hope is a reporting structure that leads to a more collaborative environment to meet the campus safety needs.

Fraternity and Sorority Life

With two new outstanding professionals in the Office of Fraternity and Sorority Life, it is full steam ahead in strengthening Longwood University fraternities and sororities. The associate director has been in several discussions with our unrecognized Greek letter organizations toward the goal of becoming recognized. Several of these groups are ready to transition and the staff is

set to begin those processes this coming spring 2014 term. Additionally, the staff was excited by the number of men who were nominated for leadership positions within the IFC and the number of women seeking CPC leadership positions. This is a testament to the relationships that have been and continue to be developed with the men and women in fraternities and sororities.

Currently, there are 22 national chapters, several which are national award recipients, with over 20% of the undergraduate population involved in fraternities and sororities. In addition to these accomplishments, Fraternity and Sorority Life is looking forward to growing the community, both in sheer numbers and effectiveness of creating values-based citizen leaders.

Police Department

The opening of the new section of Lancer Park has proven to be a great addition to the overall campus community; however, such growth does not come without some negative issues. The moving of almost 500 students off the main campus to the Lancer Park facilities, along with the addition of 200 first-time parking spaces for freshman at that location, has had a significant impact on the LUPD manpower allocation and response times to calls for service. To put this in perspective, during the 2012 fall semester the LUPD responded to 25 calls for service at Lancer Park. As of November 15, 2013, LUPD officers have responded to 80 calls for service at Lancer Park. The overall effect is that officers are spending much more time at Lancer Park dealing with Law Enforcement issues, thereby reducing core campus availability and increasing the response time to calls for service on the main campus. This issue was anticipated over a year ago and the LUPD staff has produced a department reorganization and manpower allocation proposal that is currently awaiting funding approval.

The decision to allow the addition of 200 new freshmen to bring cars to campus appears to be a great success. It was well received by students, and the implementation went smoothly. Even though additional parking was added to the Lancer Park portion of campus and does figure in at some level to the increased calls for service, the overall view of students and the campus community as a whole is very positive.

Residential and Commuter Life (RCL)

The Occupancy Management area has worked to determine how to manage the increased need for housing (approximately 250 beds) for 2013-14 when the Cunninghams are closed. The plan includes converting one room in each Longwood Village apartment from a single to a double room. This will provide a less expensive option for some students who want to live in a Longwood managed apartment. In addition to the space at Longwood Village, larger rooms in Arc will be converted to triple rooms, and approximately 150 new freshmen will be housed in transitional (double rooms with a "temporary" third person added) housing.

The annual Landlord Breakfast and Housing Fair offered opportunities to learn about changes in the residency policy changes and an opportunity to interact with students interested in moving off campus

RCL collaborated with the First Year Experience and Family Programs staff to enhance the Commuter Welcome Wagon and the Transform Program (for new transfers) in an attempt to better meet the needs of these student groups. Theme week and campus wide programs continue to be offered, including *It's Only Love*, *Trunk or Treat*, *Thanksgiving Lunch for Commuters*, *Campus Safety Walk*, and RAVE (Respond to Acts of Violence Effectively).

Student Conduct and Integrity

The Office of Student Conduct and Integrity oversees the disciplinary system on Longwood's campus. Thus far in the 2013-2014 academic year, the number of disciplinary cases has decreased as compared with fall semester 2012. This year the Conduct Board has heard 86 cases and the Honor Board has heard a total of 17 cases. In comparison, during the first semester of the 2012-2013 academic year, the Conduct Board heard 38 cases and the Honor Board heard 103 cases.

This office coordinates all Title IX investigations involving students. Title IX investigations are required for incidents of sexual harassment, sexual misconduct, domestic violence, intimate partner violence and stalking that occur on or have an impact on Longwood's campus. During fall semester 2013, the office coordinated sixteen Title IX related inquiries and investigations. In contrast, during the entire 2012-2013 academic year, the office coordinated only two Title IX investigations. This increase in investigations is due to a change in the federal requirements for what must be investigated, not due to an increase in incidents. Currently, Title IX investigations are conducted by four trained Student Affairs' staff members who have volunteered to undertake this additional workload. Due to the increased demand for investigations, an additional twelve investigators will be trained before classes resume in the spring.

Student Engagement, Activities, and Leadership

Fall 2013 has been a strong start to the newly created Unit of Student Engagement. Several new staff members have joined the Student Engagement team and have quickly taken their places as college student educators providing high quality educational experiences for the students of Longwood University. The Office of Diversity and Inclusion has moved into the Lankford Student Union. With renovations to the former Lankford Lanes Bowling Alley, space was created for the N.H. Scott Lounge, and the ODI professional staff have offices on the main floor. This physical move will accelerate the transition of combining under one area the leadership and service learning programs with the Diversity and Inclusion program into the new Office of Citizen Leadership and Social Justice Education. The Student Engagement staff is excited of the many new possibilities that this will offer.

Student Activities

Family Weekend, sponsored by the Student Activities Office, and Rock the Block, sponsored by the First Year Experience Office, illustrated the power in strategic partnership. This year the two programs were intentionally scheduled for the same weekend. Families, students, faculty, staff, and the community enjoyed a full weekend of music, fun, family, and community. With the partnership both programs were enhanced setting the stage for future events and collaborations.

Oktoberfest 2013 event brought the Longwood University community for a great weekend of events, fun, and festivities. The Mortarboard organization is to be commended for a full weekend that ran smoothly.

Student Leadership

The 2013 Mountain Lake Leadership Conference was well heralded by the 79 students and 10 faculty and staff members that attended the conference from November 8-10, 2013. This year's theme *Oh, The Places You'll Go!* focused the keynote address, sessions, and group activities around assisting students to discern their passion in life, and develop a vision and direction for their futures. A total of 15 interactive and creative workshops were facilitated by faculty and staff, as well as student and faculty-student pairs.

The New Student Leadership Program followed on the heels of New Lancer Days this Fall, attended by 48 students and 2 staff members. This year's program included an exploration of leadership skills, group dynamics, team building, and diversity awareness. Activities and keynote programs were designed to provide new students with the opportunity to reflect on their current leadership skills, learn about involvement, leadership and resource opportunities across campus, as well as discuss issues that they may face and concerns that they may have as new members of the Longwood University community.

Citizen Leadership is a vibrant part of the Longwood University community, as evidenced by the myriad philanthropic and service events that students, faculty, and staff are involved in. Students have maintained strong connections with existing community agencies including Farmville Habitat for Humanity, the Southside SPCA, Clean VA Waterways, The Joshua Bolt Foundation, LCVA, and FACES. In addition, students have expanded into additional agencies and provided service hours at new opportunities that include Glory Reins Ranch, the Central Virginia Library, and Hospice of Virginia. A community agency connection that has grown significantly stronger this year is that of the Moton Museum. Groups of students assisted in the publicity and execution of two key events this fall that partnered with the Moton Museum; the 3rd Annual Moton Museum Banquet and the C.G. Gordon Moss Lecture, both held in October.

Wellness Unit

Collaborations have been the focus of the Wellness Unit this year through traditional programs and special events. Our annual Wellness Fair, hosted in the Health and Fitness Center (HFC), again partnered with LSEM and PHED 101, as well as with partners throughout campus and the community, to introduce students to the wellness opportunities in the area. The Late Night at the Rec Halloween Edition co-sponsored with Lancer Productions was our biggest alternative late night event to date. This year's Relay for Life will be held indoors in the HFC in March and promises to be another outstanding special event for the university.

All units have continued to expand our reach throughout the campus as well. Campus Recreation replaced all of the treadmills in the HFC with new state of the art machines and purchased new exercise equipment for the fitness center at Lancer Park. The treadmills from the

HFC were recycled to Health, Athletic Training, Recreation and Kinesiology (HARK) to assist them in better meeting the needs of those programs. A few Issues facing the wellness unit are space needs for the Health and Counseling Center, organizational structure of the Environmental Health & Safety office and the management of the Longwood University Golf Course.

Report on Student Housing

CURRENT OCCUPANCY

As of November 4, 2013, 3103 students are assigned to main campus residence halls, Longwood Landings, Lancer Park, and Longwood Village.

Category		±Continuing Students	New First Time Freshman	New Transfer Students	Readmitted Students	TOTAL RESIDENTS
Fall 2013 (11-04-13)	MC	603	1072	54	12	1741
	APTS	1253	0	91	18	1362
	TOTAL	1856	1072	145	30	3103
Fall 2012 (11-02-12)	MC	987	1015	42	13	2057
	APTS	871	2	56	4	933
	TOTAL	1858	1017	98	17	2990
Fall 2011 (11-02-11)	MC	1024	1070	46	14	2154
	APTS	896	0	37	4	937
	TOTAL	1920	1070	83	18	3091

SUDENT DISTRIBUTION	Fall 2013	Fall 2012	Fall 2011
On-Campus Residents	1741	2057	2154
Longwood Landings	405	402	402
Lancer Park	687	255	257
Longwood Village	270	276	278
Total	3103*	2990	3091

CLASS DISTRIBUTION:	Fall 2013	Fall 2012	Fall 2011
±Freshman	1123	1045	1107
Sophomore	892	854	824
Junior	590	569	620
Senior	498	522	540
Total	3103	2990	3091

GENDER DISTRIBUTION:	Fall 2013	Fall 2012	Fall 2011
Females	2056	2014	2082
% Female	66.3	67.4	67.4
Males	1047	976	1009
% Males	33.7	32.6	32.6
Total	3103	2990	3091

±Includes 7 international exchange students for fall 2013.

Tab 9



Facilities

Dick Bratcher, Vice President

Fall 2013 has proven to be a busy semester filled with challenge, accomplishment, and movement toward the future. The atmosphere has been scented with a bittersweet mixture of trepidation and pride regarding the loss of two of our management team to other organizations. Organizationally, we are moving forward and looking for ways to leverage loss into continual improvement. From a project standpoint, tremendous progress is being made and we are casting an eye to the future.

Reorganization

The last major organizational change in Facilities Management took place in the 2005 to 2006 time period. At that time, a decades-old structure was re-molded into the five sections of Capital Planning & Construction, Facilities Operations Services, Real Property Management, Facilities Administrative Services, and Landscaping & Grounds Management. A new management team was put in place utilizing a mix of in-house and contracted management.

Two key members of our leadership team have found growth opportunities in other organizations. Real Property Manager Louise Waller accepted the position of Executive Director of Longwood University's Real Estate Foundation, while Director of Capital Planning & Construction JW Wood accepted the chief facilities officer position at Randolph College near his home in Lynchburg. While the division will greatly miss these talented leaders, the management team is restructuring itself as a part of its commitment to continual improvement.

The Real Property Management team and the Capital Planning & Construction (CP&C) team are being remolded into two new teams. Over the years, the real property management team has become increasingly involved in the space, facilities, and capital planning efforts of the university. Over that same period, both the capital planning functions and capital construction functions within CP&C have matured. Following several months of analysis and dialogue, two new sections are emerging within Facilities Management.

David Pletcher, who has long served the university in the role of capital outlay engineer, will be taking the reins as Director of Capital Design and Construction. His unit will be focused on the cradle to grave management of all of our capital projects. David and his staff will shepherd each project from the initial conceptual designs through final completion. The heart of Capital Design and Construction's efforts will be bringing our building and facility concepts into reality.

The second new section being formed is Campus Planning and Development. The core function of this group will be a continual assessment of our current facilities and the development of plans to meet current, emergent, and future needs. The former position for the Director of Capital Planning & Construction has been repurposed as the University Architect and Director of Campus Planning and Development. The former position of Real Property Manager has been

repurposed as Space and Real Property Manager. The Real Property Assistant has been repurposed as an Information and Plans Coordinator. Combining these positions with our Facilities Planners position will create a unit focused on meeting current needs and planning for those of the future.

Capital Budget

Facilities Management and Real Property has been working with Administration and Finance to develop an annualized capital budget framework. Historically, capital projects have been budgeted at the individual project level. An annualized budget will provide a tool for managing the fiscal resources related to capital projects at a higher level.

In the near term, the capital budget will provide information related to the magnitude of resources available for the various projects. From a practical standpoint, this information will be helpful in developing cash flow and economic impact analyses. Longer term goals for the budget model will be to develop the ability to project future cash and debt service requirements for capital projects. This should prove to be an important planning tool for developing cash reserves, as well as revenue streams to offset debt service.

Longwood House

Over the past decade, there have been a number of projects carried out to preserve and enhance Longwood House. As the third oldest University President's house in the nation, this 1815 structure is truly an important asset. Over the years, projects have been focused primarily on exterior and structural preservation efforts coupled with some superficial cosmetic modifications.

The opportunity afforded us through actions of the Board of Visitors last year have allowed us to take the building to the next level. The most recent improvement project at the Longwood House had four goals. These goals were:

1. Provide Americans with Disabilities Act compliance and perform necessary structural maintenance.
2. Enhance public use space to support university, community and fund-raising events.
3. Enhance guest accommodations for use in philanthropic endeavors.
4. Update the private living quarters.

The work associated with the first goal included construction of an ADA compliant restroom on the first floor and an ADA compliant access ramp from the exterior sidewalk to the side porch. These items were designed and constructed to maintain the functionality of the house, and to blend in with, and not detract from, the appearance of the house. Landscaping around the ramp played a major role in achieving this goal. Sidewalks were reconfigured to provide more direct access to the house and to provide access to the ADA ramp. Structural maintenance items included repair/replacement of decking and stairs on the back porch, installation of new storm doors and door hardware, sealing of parking lots, painting of walls, replacement of light fixtures, removal of unnecessary baseboard heating units, and upgrade of the house's security system.

Work to address the second goal included an upgrade to the kitchen and powder room, reupholstering of furniture, new sound system, new window treatments, and new furniture. The kitchen upgrades consisted of new equipment to support Aramark catering of events at the house. This was the first upgrade of the kitchen since 1996. The other upgrades elevated the appearance and enhanced the amenities of the first floor for guests.

Goal three's focus on guest accommodations included renovations of bathrooms with new fixtures, floor and wall finishes, and new furniture. These bathrooms had not had a major renovation since the period of Dr. Willett's occupancy.

The fourth goal of updating the private living quarters included renovations of bathrooms with new fixtures, floor and wall finishes, stabilization of the interior stairway railing system, and installation of gates. These bathrooms also had not had a major renovation since the period of Dr. Willett's occupancy.

This project has been an exciting one. It is actually a culmination of a lot of hard work over a number of years. While we will continue to improve the property through projects in the future, Longwood House has now been palpably revitalized. It is a structure truly befitting its historical significance.

Sophomore Residence Hall

A significant part of the vision behind Longwood's current comprehensive Campus Master Plan is that over time, Longwood will retain its residential character. The plan responds to a goal of 2,000 students living in on-campus residences. The closure of French and the Cunninghams will bring the on-campus housing capability to levels below 1,600. In anticipation of this, the master plan envisioned residence halls forming a quad on the current site of ARC.

A huge part of the Longwood experience is being a part of a strong academic community. A thriving, vibrant residential community within the bounds of the campus is an integral part of that experience. It's all about being immersed in a learning experience and not just going to class. As a result, it is extremely important that Longwood maintain a reasonable number of student residences on main campus.

University staff is studying the feasibility of building a residence hall to house at least 200 students in the near future. It is anticipated to be a traditional suite style residence to primarily meet the needs of sophomores. Building design will strongly reflect the traditional Jeffersonian/Neo-Palladian architectural styles prevalent on the campus.

Enrollment growth, coupled with this year's closing of the Cunninghams will put significant pressure on Longwood's housing inventory. The most effective strategy to meet this growing need will be to have the Longwood University Real Estate Foundation build the structure on Longwood property. Staff have been working with the Office of the Attorney General to review our management agreements and develop an appropriate ground lease that will allow us to proceed.

Next steps in the process will be to develop the project management methodology and to engage a team to embark on planning. A construction management at risk project model is being developed to guide the planning, design, and construction phases of the project. Projections for housing demand indicate that this project needs to be completed as early in calendar year 2016 as possible, hopefully by the beginning of the 2016-17 academic year.

This will be an exciting capstone project of Vision 2020, The Comprehensive Campus Master Plan for Longwood University. As we move into a new university master planning process it is important that we continue to meet those critical needs identified in the past. In order to support Longwood's move forward into a bright new future, we need to move forward aggressively with this project.

University Master Plan

Longwood's current master plan, "Vision 2020, The Comprehensive Campus Master Plan" was adopted by the Board of Visitors (BOV) in 2008 and has served Longwood well over the past five years. As discussed during the September Board meeting, it is now time to embark on the next campus master planning project – *Longwood University Master Plan 2025*. Significant progress is being made toward that end.

The preliminary planning process of developing a clear picture of the current physical state of the institution has commenced. The facilities condition assessment, a process that reviews in detail the condition of buildings and infrastructure, started in October. A study to determine the location and capacity of existing campus utilities, and the space utilization and needs analysis, will commence shortly. These studies are anticipated to be substantially complete in March 2014, in time to be available to support the initiation of the master planning process.

A project management supervisory structure has been developed. The recommended structure consists of steering committee and a working group. The steering committee will be responsible for providing an interface with the BOV, and ensuring that all internal and external constituencies are included. This committee will also work with the BOV to provide strategic direction and guidance to the process. The final recommendation to adopt the new master plan will be made by the steering committee.

The working group will handle the nuts and bolts of the planning process. This group will guide the planning firm throughout the process. They will also be directly involved in seeking input to the plan and providing feedback regarding the plan. At the core of the work will be the working with the planning firm to develop alternative solutions to identified needs and drafting of the plan.

In order for the master planning process to be successful, the steering committee and working group will need guidance for the plan. A number of concepts have emerged through dialogue with university leadership. These guiding concepts are presented for the consideration by the Board of Visitors:

- The planning horizon should be 2025, but include consideration of 2039
- The plan should be comprehensive by addressing:
 - the totality of Longwood's physical locations;
 - the entire Longwood experience including student life and athletics;
 - the broader transportation issues and needs of the university community, as well as;
 - the big issues in higher education (now and in the future).
- The target enrollment should be 6,000 students
 - Total number of students, including graduate students, taking classes on campus
 - Should not include students taking on-line and distance learning classes
 - Some latitude in specificity and flexibility must be allowed
- Longwood should retain its character as a strong residential community
- Longwood will be:
 - "The same, but better"
 - Sustainable
 - Timeless
 - A destination
 - A beautiful place with strong claims to peoples' spirits that will survive in the long term
 - A place that fosters alumni affection and attraction to the campus
 - Linked to the town in a pedestrian-friendly manner
- Longwood should be a "key node" and an "engine for prosperity" for the local and regional community (must carefully define this role).

The University Master Plan must be developed in time to inform the development of the six year capital plan for the next biennium. Therefore, the master planning process must commence as early as March 2014. This target is ambitious, but is necessary to meet the requirement to produce a final draft report by March 2015. Subsequently, the final University Master Plan will be presented to the Board for approval, and then published. It is anticipated that this next phase of the project will require funding up to \$950,000. The entire planning will be complex, detailed, rigorous, and on a very intensive schedule. However, this entire effort is an essential and exciting part of positioning Longwood University for a bright future.

Capital Construction Update

Longwood's major capital construction projects continue to progress well. Each of these projects is in a varying state of design or construction, or has been completed. The following is a table of the current status of each of these projects:

Project	Project Start	Current Status	Projected Completion
University Technology Center (French)	Aug 2008	Project is in Construction Phase	Fall 2014
Maugans Alumni Center	Mar 2012	Revised Working Drawing under BCOM review	Fall 2014
Stubbs Renovation	Sep 2012	Project is in Construction Phase	Fall 2014
Additional Biomass Boiler	Aug 2012	Project is in Schematic Design Phase	Summer 2015
Willett HVAC	Sep 2012	Project is in Working Drawing Design Phase	Fall 2015
Student Success Center	Aug 2012	Project is in Planning Phase	Fall 2016
University Center (Student Union)	Aug 2008	Project is in Schematic Design Phase	Spring 2017
New Academic Building	Jul 2013	Project is in A/E Procurement Phase	Fall 2017
Admissions Office	Jul 2013	Project is in A/E Procurement Phase	Fall 2017

Tab 10



Strategic Operations

Victoria Kindon, Vice President

The Division of Strategic Operations advances Longwood's mission by building and strengthening connections with students at every stage of their relationship with the university – as prospective students, current students and active alumni. The division works to nurture lifelong relationships through personal interactions and connections, supplemented by the careful analysis and application of data and state-of-the-art information technology. The division comprises of the offices of Public Relations, Information Technology Services, Alumni Relations, and Enrollment Management and Student Success. Highlighted below are a few of the recent activities and achievements each office has completed toward our mission.

PUBLIC RELATIONS HIGHLIGHTS

The Spirit of Longwood Past, Present and Yet to Come

Longwood's 2013 holiday video combines elements of two traditional holiday stories, stop-motion animation, a beloved professor and a nod to "Masterpiece Theatre." Scheduled to be distributed the week of December 9 to alumni, donors, boards, parents, faculty, staff and other constituencies, the video is titled "The Spirit of Longwood Past, Present and Yet to Come." Jim Jordan, professor of anthropology, narrates a poem styled after "The Night Before Christmas" that describes the holiday visits of three spirits to the Longwood campus. Stop-motion animation illustrates the poem. The concept for the video was a collaborative effort of the entire Public Relations staff, with video and animation by Andrea Dailey and the poem written by Matthew McWilliams.

Football, Napkins and Popcorn Bags: Direct High-School Promotions

For the second year, the Office of Public Relations has coordinated an extensive effort to reach prospective undergraduate students through direct sponsorships and promotions targeting 11 high schools in our primary recruitment areas of Northern Virginia, Richmond and Hampton Roads. These efforts include athletic sponsorships that place Longwood banners in sports venues at the schools and, in one case, a message read over the PA system at football games; plastic footballs with the Longwood logo given out at games and other events; and napkins and popcorn bags with the Longwood logo used in concession stands. In addition, Longwood placed advertisements encouraging students to visit our campus in 12 high-school newspapers in our target areas.

Launch of Weather and Emergency Alerts Website

In an effort to better prepare for handling emergency communications, the Web Communications team in the Office of Public Relations launched a new Weather and Emergency Alerts website in

fall 2013. The site is hosted remotely, which increases its ability to handle the heavy traffic that can cause a site to crash during an emergency.

The site was conceived of and built completely by Public Relations staff on a WordPress platform. The site's functionality allows for simultaneous posting of text messages and updates to the site itself as well as to the longwood.edu homepage. In addition, visitors can find archived alerts on the new emergency website and sign up to receive text alerts. In conjunction with the creation of the new site, Public Relations staff created a #SafeAtLongwood hashtag that students, faculty and staff can use to let others know they are safe in the event of a major crisis.

INFORMATION TECHNOLOGY SERVICES HIGHLIGHTS

Review of Contracts in Search of Savings

Over the past year, we have been evaluating our technology contracts and renegotiating or terminating for cost savings and enhanced services. As a result, we have saved more than \$100,000 for FY 2014.

Students Register in Record Time

Registration for the spring 2014 semester not only went smoothly but was also completed in record time. Within the first 15 minutes of the 6 a.m. registration opening, 43-85 percent of all students were registered for thousands of classes. In fact, 75 percent of freshmen and sophomores were registered within the first two minutes of registration opening for them.

Implementation of Modern Software Development Method

In the past decade, software development and project management methodologies have shifted to be able to adjust rapidly to changing organizational needs. It has been shown that traditional development that is heavy on upfront planning and requirements coupled with long development periods is less successful and cost-effective than lightweight and incremental development cycles.

As a result, we changed our approach to development and adopted the Agile methodology as a departmental standard. Our first project using the new methodology was for the Office of Professional Services within the College of Education and Human Services. After taking a fresh look at the project, which had been languishing for about two years, we determined it could be completed in six months. ITS successfully delivered the end product on time and to a very satisfied client.

ALUMNI RELATIONS HIGHLIGHTS

Alumni Twitter Program

The Alumni Board at their late September meeting approved a new project: the Alumni Twitter Program. The purpose of this program is to engage more alumni with both alumni programming and other alumni, to provide young alumni career-enhancement information, to provide a career-development resource for current students, to provide networking opportunities for alumni and students, and to provide faculty with opportunities to engage with former students. Each week one alumna/us will be selected as the “tweeter of the day,” with the focus on tweeting about his/her career and using a special hashtag. We hope to have this program operational in February. Criteria for the selection of tweeters of the day include occupation, understanding of social media and Twitter, willingness to commit to tweeting during the day and responding to related tweets, and diversity of academic departments represented. Alumni members of the Alumni Board, the Foundation Board and the Board of Visitors could be asked to help start this program.

Alumni in the Community

The Alumni Board members are taking more responsibility for activities. Longwood Starbucks Morning will be held from 7-10 a.m. on Saturday, November 30, at the Starbucks at the Kroger in Midlothian. The first 50 alumni, students or faculty/staff to arrive will receive a \$5 Starbucks gift card from the Alumni Association. Board members will be there to greet and talk with those who show up for this unique engagement activity.

ENROLLMENT MANAGEMENT & STUDENT SUCCESS HIGHLIGHTS

Admissions Applications Up

As of November 8, 2013, admissions applications for fall 2014 are up by 265 (25 percent) compared with the same date last year (if the increase in nursing applicants due to an earlier application deadline is included, the increase is 332 or 31 percent.) The number of accepted students is also up by 137 (24 percent) compared with the previous year at the same time, with quality measures of SAT and high-school GPA about the same.

Application of Retention Predictive Model

Together with Associate Professor of Economics David Lehr, a predictive model for student graduation and retention was developed. The fall 2013 freshman class cohort was run through the model to identify students who were most likely not to be retained. We took action as a result of this new insight, with the goal to further strengthen the bond between a segment of these students and Longwood. We will retain the data from this project in order to further analyze our efforts.

Report on Fall 2013 Enrollment

	Fall 2011 (final)	Fall 2012 (final)	Fall 2013 (final)
Total Headcount	4860	4834	4960
On-campus*	4502	4505	4611
Off-campus	358	329	349
% of off-campus	7.37%	6.81%	7.04%
Full-time	4148	4095	4265
Part-time	712	739	695
% of Full-time	85.35%	84.71%	85.99%
In-State	4590	4610	4731
Out-of-State	270	224	229
% of Out-of-State	5.56%	4.63%	4.62%
Degree Undergraduate	4160	4185	4353
Degree Graduate	378	354	367
Non-degree Undergraduate	77	170	144 (including 1 ESL students enrolled in credit course)
Non-degree Graduate	245	125	96
ESL**	n/a	11	13
Female	3335	3320	3369
Male	1525	1514	1591
% of Male	31.38%	31.32%	32.08%
International	35	37	44
% of international	.72%	.77%	.89%
Minority***	698	749	846
% of Minority (self identified)	14.36%	15.49%	17.06%
% of Race Unknown (self identified)	2.94%	3.04%	3.45%

MEDIA COVERAGE & PLACEMENT HIGHLIGHTS (Aug. 17, 2013-Nov. 19, 2013)

President W. Taylor Reveley IV's presidency and family legacy were covered in a front-page feature story in the *Richmond Times-Dispatch* titled "For Longwood head, higher ed runs in the family" on Sept. 1, 2013.

Advance announcements of **President W. Taylor Reveley IV's inauguration** on Nov. 15 ran in the *Richmond Times-Dispatch*, *Washington Post*, *Williamsburg Yorktown Daily*, and the *Farmville Herald*, which then covered the inauguration at length on its front page. Post-inauguration stories ran in the *Washington Post* as well as on the websites of WSET-ABC 13 in Lynchburg, WVIR-NBC 19 in Charlottesville, WWBT-NBC 12 in Richmond, and *The Republic* in Columbus, Ind., among others. The *Richmond Times-Dispatch* printed an edited version of President Reveley's inaugural address as an op-ed.

Longwood's recognition as a **National Center of Digital Forensics Academic Excellence** by the Defense Cyber Crime Center was covered by the *Virginian-Pilot* of Norfolk in a story titled "Longwood gets Cyber Crime Center designation" on Sept. 18, 2013. The story also ran in the *Richmond Times-Dispatch*, washingtonpost.com, financialcontent.com, FatPitchFinancials.com, WWBT-NBC 12 of Richmond, WRIC-ABC 8 of Richmond, WTOP FM of Washington, D.C., the Associated Press, the *Sacramento Bee*, the *Fresno Bee*, WSLN NBC10 of Roanoke, *The Republic* of Columbus, Ind., WVIR-NBC 29 of Charlottesville, the *Progress-Index* of Petersburg and the *Southside Messenger*. The cyber security center was also highlighted by *Virginia Business* magazine in an article titled "Cybersecurity is the most in-demand IT skill set" on Oct. 30, 2013.

Professor Bennie Waller's research on homes sold by veteran real estate agents versus inexperienced sellers was featured in a story in *Wall Street Journal* titled "The Price of Real-Estate Experience: \$25,000" on Sept. 12, 2013.

Longwood research by Dr. Ray Brastow was featured in a *Virginian-Pilot* story titled "Clusters of sex offenders can ravage home values, study finds," on Oct. 6, 2013. This story also ran on WTVR-CBS 6 of Richmond, Market Intelligence Center, FatPitchFinancials.com, the *Virginia Gazette* of Williamsburg and benzinga.com.

An op/ed written by **Dr. Larissa Smith Ferguson** on the civil rights anniversaries of the 1963 Birmingham, Ala., church bombing and the opening of the free schools in Farmville ran in the *Virginian-Pilot* of Norfolk on Sept. 15, 2013. The op/ed also ran in the *Richmond Times-Dispatch*, *Daily Press* of Newport News, *The Daily Progress* of Charlottesville, *The News & Advance* of Lynchburg, *Danville Register & Bee* and the *Roanoke Times*.

Research by Dr. George Banks, assistant professor of management, was featured in a story titled "Good news: Being smarter doesn't make you an evil genius" by the *Augusta (Ga.) Free Press* on Oct. 23, 2013. The story was also referred to by the *Virginian-Pilot* of Norfolk.

Eduardo De Souza, soccer coach at Longwood University, was interviewed by the national NPR program *Tell Me More* for a story titled "What Latinos Want From Immigration Reform" on Oct. 23, 2013.

Tab 11

LONGWOOD UNIVERSITY

BOARD OF VISITORS

September 13 & 14, 2013

-Minutes-

*******DRAFT*******

Call to Order

The Longwood University Board of Visitors met on Friday, September 13, 2013 in Cox Hall on campus. The meeting was called to order at 9 a.m. by Rector Marianne Radcliff.

Members present:

Dr. Edward Gordon
Mr. Thomas Johnson
Dr. Judi M. Lynch
Mrs. Jane S. Maddux
Mrs. Colleen McCrink Margiloff
Mr. Stephen Mobley
Mrs. Marianne M. Radcliff
Mr. Brad Schwartz
Mrs. Shelby Jones Walker
Mr. Lacy Ward, Jr.
The Hon. Robert S. Wertz, Jr.
Mr. Ronald White

Members absent:

Mr. Eric Hansen

Also present:

President W. Taylor Reveley, IV
Mr. Kenneth Copeland, Vice President for Administration and Finance
Dr. Kenneth Perkins, Provost and Vice President for Academic Affairs
Dr. Tim Pierson, Vice President for Student Affairs
Mrs. Aneicia Stimpson, Acting Director of Internal Audit
Mr. Troy Austin, Director of Athletics
Ms. Brenda Atkins, Vice President for Commonwealth Relations
Mr. Richard Bratcher, Vice President for Facilities Management and Real Property
Mrs. Virginia Kinman, Director of SACSCOC Compliance Certification
Mr. Cameron O'Brion, Office of the Attorney General
Mr. Robert Burger, President, Longwood University Foundation

Ms. Kathleen Early, President, Alumni Association
Dr. David Lehr, Chair, Faculty Senate
Dr. E. Derek Taylor, Faculty Representative
Ms. Jeanne Hayden, Executive Assistant for Commonwealth Relations
Ms. Haley Vest, Student Government Association President
Mrs. Louise Waller, Executive Director, Longwood University Real Estate Foundation
Ms. Hannah Ledger, Co-Chair, Staff Advisory Committee
Ms. Allison Dobson, Co-Chair, Staff Advisory Committee

Public Session

No public comments were received at this meeting.

Rector's Welcome

Mrs. Radcliff introduced new board members Colleen Margiloff and Bob Wertz and also recognized Bob Burger, President of the Longwood University Foundation, and Kathleen Early, President of the Alumni Association. The Rector then recognized the long service of Ms. Jeanne Hayden to the Board of Visitors and applauded Ms. Hayden's new key role as Executive Assistant for Commonwealth Relations. The Board rose in a standing ovation for Ms. Hayden.

Approval of Consent Agenda

Mrs. Radcliff presented to the Board for its approval the consent agenda, which was approved unanimously. The consent agenda included the minutes of the June 2013 Board of Visitors Meeting, an articulation agreement between the University and University Foundation, and an approval of real estate signatory authority. (A copy of the consent agenda items is included as Appendix 1.)

President's Welcome

President Reveley offered welcoming remarks, noting he has now passed his first 100 days in office, and presented a financial overview of the University, which he described as in strong financial condition. He asked Virginia Kinman to update the Board on the status of the SACSCOC reaffirmation of accreditation process and she shared with the Board information gathered for the Compliance Report. The reaffirmation process is moving smoothly. President Reveley explained the University has elected to report itself fully compliant with all SACSCOC requirements and standards except one: it is reporting itself as partially compliant concerning faculty evaluation, due to issues with how Longwood has evaluated some adjunct faculty in the past. All full-time faculty receive appropriate evaluation. He and Dr. Perkins said steps are being taken to ensure existing policies are followed going forward. Mr. Mobley asked about the costs of the SACSCOC reaffirmation process. President Reveley replied they are considerable but easier for

Longwood to bear than some other institutions. The decennial reaffirmation of accreditation process is expected to be fully complete in December 2014.

Academic Affairs

Dr. Perkins explained the structure and scope of his division. President Reveley described the importance of the curriculum review that will take place in the coming years, and described aspects of the Quality Enhancement Plan and its connection to general education reform, as well as how undergraduate research will become a signature portion of a Longwood education. Mrs. Maddux inquired about funding for the Center for Academic Faculty Enrichment. Dr. Perkins responded its support currently comes from other budgets but the goal is for CAFÉ to have its own. Dr. Lynch emphasized the center's importance.

Administration and Finance

Mr. Copeland offered an overview of the University's financial position and funding sources. He described progress of the Lancer Plan, the University's new budget and planning tool, and emphasized the importance of professional development, namely maintaining professional and trade designations – an area that may have received insufficient attention during the economic downturn. Mr. Burger noted the improved state of the Foundation's endowment. President Reveley emphasized the importance of streamlining operations that remain paper-based, and improving payment to student employees. He noted Longwood is unusual in holding such a high level of reserves exclusively with the state rather than also as local funds. He wishes to explore options for more effectively managing cash reserves going forward. Mr. Copeland described efforts to ensure bill collection does not interfere with other University goals such as retention and is not unduly punitive, and said a \$50 graduation fee has been abolished for 2014. Mrs. Radcliff emphasized the importance of a strong financial foundation for instilling confidence in potential funding sources, namely the Commonwealth and donors.

Commonwealth Relations

Ms. Atkins described her new role as of September 1 and her goals of developing programming to benefit Longwood students but also attracting 100-300 VIPs to visit campus and develop a closer relationship with the University. She updated the Board on interactions with state officials, and efforts to introduce the president to key decision-makers, and to attract more of them to campus. She noted the recent capital campaign had been relatively successful considering its unfortunate timing just ahead of the global financial crisis, and discussed goals to reach a broader corporate and foundation audience, as well as expand conference activities.

Mr. Mobley asked about the cost and effectiveness of Longwood's fundraising efforts. President Reveley said the University's cost per dollar raised is somewhat lower than the general target of 10 cents on the dollar but better information is needed and more resources are needed for advancement. Due to pressures on Virginia's budget, he said Longwood will over a ten-year horizon need to develop philanthropic support approaching current levels of state support. Mrs. Margiloff posed a question regarding how best

to instill a culture of giving in current students and recent alumni, and Dr. Lynch emphasized the importance of class affinity for fundraising. President Reveley said the warmth alumni feel for Longwood isn't currently fully translated into giving, and emphasized better retention could improve class affinity by keeping students together with their cohorts. Ms. Vest emphasized the importance of developing small donations, considering the difficulties of students facing loan debt. Mr. Schwartz noted how the revived football program has driven student engagement at Old Dominion University. President Reveley agreed that sports at the Division I level offer unparalleled opportunities for developing identity and marketing the University.

Athletics

Mr. Austin gave an overview of all departmental operations. He noted the goal of holding flat and eventually reducing the student athletic fee, and discussed the rapidly changing landscape of the NCAA, including how Longwood would be affected if the NCAA allows institutions to pay student-athletes. President Reveley noted the importance of building contacts with orthopedic experts given their paucity in Farmville. Dr. Gordon suggested exploring an arrangement with Centra to provide orthopedic services to Longwood student-athletes.

The Board adjourned for lunch at approximately 12:05 p.m., and was addressed by men's basketball coach Jayson Gee. The Board reconvened at approximately 1:15 p.m.

Reports from Representatives to the Board of Visitors

Dr. Taylor, Faculty Representative, said the faculty is excited about the prospect of a campus-wide discussion of general education. He emphasized the importance of general education being both practical and preparing students for the unknown. He said while general education is often vague and easy at other institutions, at Longwood there is potential to be a place where general education is an exceptionally strong part of the curriculum.

Ms. Vest, Student Representative, reported positive student reviews of the new facilities at Lancer Park and updated progress on the voter registration initiative TurboVote. She urged continued efforts to encourage faculty to post more course material online. She reported students, while aware of and somewhat concerned about the athletic fees, are excited about the progress and potential of the athletics program.

Ms. Early, President of the Alumni Association, provided an update on the recovery from injuries of Nancy Shelton and on activities of the Alumni Association, including sports clinics in Northern Virginia, which it hopes to expand to other regions.

Mr. Burger, President of the Foundation Board, reported on a strong year for the Foundation, with receivables up significantly and the investment relationship with Spider Management proving successful. Only eight funds remain under water from before the financial crisis that began five years ago, and assets

are \$10 million higher than a year ago. He emphasized the potential of Hull Springs Farm for the University both in terms of educational opportunities and expected income from wetlands credits. He was asked about a recent decline in the total number of donors to the University. He said he would explore the reason, but expected the earlier-year numbers may have reflected a fundraising promotion at that time, and noted the total amount of donations last year was similar to that of 2006-07.

Mrs. Waller, Executive Director of the Real Estate Foundation, provided updates on the expansion at Lancer Park and the acquisition of a former lumber yard with retail and residential space, to provide valuable transitional space during other renovations and eventually a home for facilities management.

Hannah Ledger and Allison Dodson gave a brief presentation introducing the board to the work of the Staff Advisory Committee.

Student Affairs

Dr. Pierson gave an overview of the scope of Student Affairs. He discussed changing student behavior issues, with students' psychological struggles a growing part of his work while behavioral discipline is declining.

A motion was presented to the Board for Approval of a Memorandum of Understanding by and between Longwood Counseling Center and Crossroads Community Services Board. The motion was approved unanimously. (A copy of the memorandum of understanding is included as Appendix 2.)

Facilities

Mr. Bratcher provided an update on construction plans and projects, noting a figure of \$170 million of construction on campus since 1996. The University is considering undertaking another Campus Master Plan, which can be helpful in attracting state or private funding. This time, the University anticipates improving the process by conducting thorough space and infrastructure studies.

Discussion of Governance and Strategic Matters

President Reveley addressed the importance of a residential college experience to Longwood's identity but also the importance of partnering in Farmville's economic development aspirations. He also emphasized the importance of the first two years of college for Longwood's retention goals. He said he believes the best balance of those goals would be to attempt to offer all freshmen and sophomores Longwood housing, while allowing developers to compete for the business of juniors and seniors. Such a change would likely require construction of a new sophomore dorm.

President Reveley fielded several questions from the Board and from students about the proposed change and possible new dormitory, which he said had been envisioned in the previous Master Plan. Dr. Gordon

was asked about the expected reaction of the town and he said he expected it to be very favorable. Other issues raised in the discussion included the potential for increased future demand due to growth of international and graduate students, and whether additional construction could endanger bond covenant occupancy requirements. Mr. Copeland expressed confidence the level of Longwood-owned housing demand would be strong.

Mrs. Maddux introduced a motion concerning the University's student housing policy: *"The University's student housing policy shall be revised to eliminate any requirements of University housing use for students beyond their first two years."* Mr. Mobley seconded the motion, and it was approved unanimously, with Dr. Gordon abstaining.

There was further discussion of housing issues, particularly related to the possible new sophomore dorm, and whether it might be possible to keep the Cunningham dorms open one more year. President Reveley said the Cunninghams would have a meaningful likelihood of experiencing system failures if continued in use beyond this academic year.

President Reveley raised before the Board the prospect of an evolving partnership between the Moton Museum and the University, pending possible action in the General Assembly to create a partnership similar to that between the Virginia Foundation for the Humanities and the University of Virginia. President Reveley and Mr. Ward spoke to the symbiotic relationship and potential for further collaboration – Longwood making further use of the museum's educational resources, and the museum, which has never been a collecting museum, making further use of Longwood's library and back-office resources. A closer partnership could also tap into the growing heritage tourism market and benefit the region.

President Reveley opened up the meeting, fielding several follow-up questions related to auxiliary cash reserves. There was discussion, chiefly involving Dr. Lehr and Ms. Vest, as well as other students in attendance, regarding the experience of Longwood students with collaborative learning, and possible ways to consider "how students learn" along with "what students learn" in the upcoming curriculum review.

Mr. O'Brien gave the board a short presentation concerning the requirements of the state's open meeting and Freedom of Information Act laws.

The Rector adjourned the day's session at approximately 5:30 p.m. The Board joined student peer mentors for dinner in Dorrill Dining Hall.

Saturday, September 14, 2013

The Longwood University Board of Visitors resumed its meeting on Saturday September 14 at the University's new offices at 315 Third Street in Farmville for a wide-ranging and informal discussion of retention and graduation rate challenges and opportunities for improvement. All Board members from the Friday meeting were again present, joined by the University's deans as well as vice presidents. Following a tour of the new offices, President Reveley called the meeting to order at 10:00 a.m.

President Reveley reiterated that a systematic, cutting-edge effort to raise the University's retention and graduation rates is the foremost priority for Longwood. The first step is --- through discussion and subsequent study --- to understand the specifics of the issue at Longwood.

Chuck Ross, Dean of the College of Arts and Sciences, discussed summer programs, gateway courses and general education. Since the change to per-credit tuition charges, he said, he has seen more students taking 12 credits per semester rather than 15, in order to save money. Jennifer Green, associate vice president for enrollment management, said the change had caused the average course load to decrease 1 credit on average but that many students need to work. President Reveley expressed concern the change reduced the incentive for students to take exploratory courses. Mr. Copeland said he himself has received positive feedback from parents about the opportunity to pay per credit.

Dr. Gordon asked several questions regarding the relative leniency of Longwood's course repeat policy, and Ms. Vest expressed concern the policy could devalue the value of the GPA component of a Longwood resume. Mrs. Margiloff suggested general education requirements could be a more effective vehicle for helping students explore prospective majors. Dr. Lynch agreed that course credibility is important, but also said it's important that college be a time for second chances for students who struggle.

Mr. Mobley emphasized the importance of collecting institutional data. Dr. Lehr discussed opportunities for data-mining techniques to identify students most at-risk of not graduating. Dr. Green said Longwood has not effectively identified the students it needs to target. Dr. Lehr mentioned the work other institutions have done identifying risk factors to persistence. Mr. Johnson encouraged looking at success from international students and what might be learned from them.

President Reveley and Mrs. Radcliff thanked everyone for the candid and thoughtful discussion.

The meeting adjourned at 11:30 a.m. and was followed by lunch at Longwood House for those present along with department chairs.

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Tab 12



Edits, Updates, and Amendments Regarding Policy, Procedure, and Planning

The items that follow concern standard edits, updates, and amendments to University policy, procedure, and planning, specifically regarding: Internal Audit, various matters pertaining to Academic Affairs, administrative matters concerning HR and fixed assets management, and lastly a continuing update to the six-year academic and financial plan which the State Council for Higher Education in Virginia (SCHEV) asks of each public institution of higher education in the Commonwealth. Pursuant to customary practice, this fall SCHEV requested a further update to the plan following initial submission in June 2013.

**BOARD OF VISITORS
AUDIT**

INFORMATION ITEM

Update on Internal Audit and Institutional Compliance Activity

Audits and Reviews

Audit Plan FY 2014	Status
Contract Management	In Progress
Student Union & Fraternity/Sorority Life (Student Interns)	Field Work Completed
Environmental Health & Safety	Beginning Spring Semester
Conference and Scheduling Follow-up	Beginning Spring Semester
Diversity & Inclusion / Leadership & Service Learning (Student Interns)	Beginning Spring Semester
Banner Finance	Placed on Hold (Vacant IT Auditor Position)
Information Technology – General Controls	Placed on Hold (Vacant IT Auditor Position)
IT Governance Follow-up	Placed on Hold (Vacant IT Auditor Position)
Information Technology – Lancer Card	Placed on Hold (Vacant IT Auditor Position)
Admissions Follow-up	Complete
Cashiering and Student Accounts Follow-up	Complete
LCVA Follow-up	Complete
Student Health and Wellness Follow-up	Complete
Fraud, Waste, Abuse Hotline Issues	2 Unsubstantiated

Rationale: Modification of Policy 1303 Reporting Fraud to the Auditor to include the requirement to report fraud to the State Inspector General.

Policy 1303

Reporting Fraud to the Auditor

I. Purpose

The purpose of this policy is to provide procedures for handling all suspected incidences of fraud within the University.

II. Policy

This institution establishes the following procedures for reporting fraud to the Internal Auditor.

III. Procedure

1. Section 2.1-155.3 of the Code of Virginia requires the head of an agency or institution to notify the Auditor of Public Accounts (APA), *the State Inspector General, and the Superintendent of State Police* and the Department of the State Police of all incidences of fraud within their agency or institution.
2. In addition to compliance with the Code of Virginia, the institution should notify the Internal Audit Department in cases that circumstances suggest the possibility that assets have, or are thought to have, been lost through defalcation or other breaches in the financial and operating systems. Upon such notification, the Internal Audit Department should ensure that proper authorities within the institution have been notified and that they are aware of the reporting requirements under the Code of Virginia.
3. Although it is not mandatory that Internal Audit Department investigate each situation, it should be informed and make a judgment regarding the impact of the situation on internal controls and on future audit testing.

Approved by the Board of Visitors November 1988.

Revised and approved by the Board of Visitors, September 7, 2002.

Rationale: Modification of the Internal Audit Charter to include a definition of consulting services and suggestions from the Institute of Internal Auditors.

Policy 1301

Internal Auditor: Charter

This charter identifies the purpose, authority, and responsibilities of the office of Internal Audit.

The Longwood University Internal Audit Office reports functionally to the Board of Visitors and administratively to the President. Performance problems with the Internal Audit Department will be reported by the President to the Board of Visitors immediately. These reporting relationships ensure departmental independence, promote comprehensive audit coverage, and assure adequate consideration of audit recommendations.

I. Purpose

Internal Auditing is an independent and objective assurance and consulting activity that is guided by a philosophy of adding value to improve the operation of Longwood University. It assists Longwood University in accomplishing its objectives by bringing a systematic and disciplined approach to evaluate and improve the effectiveness of the University's risk management, control, and governance processes. Internal Audit is an independent appraisal activity established within the University to examine and evaluate Longwood's management systems. University administration has the primary responsibility for establishing and maintaining a sufficient system of internal controls. Internal Audit assists University administration in the effective discharge of its responsibilities by furnishing evaluations of departmental activities, recommendations for improvements in systems and procedures, and other information designed to promote effective controls. The Office of Internal Audit may provide "consulting services" which are advisory services. The nature and scope of the services are agreed upon with Longwood's management and are intended to add value and improve Longwood's operations.

II. Responsibilities

Meaningful internal auditing requires cooperation among the Internal Audit Office, University administration, and the auditee. Each party's responsibilities in this regard include but are not limited to the following:

1. Internal Audit Office
 1. Examine and evaluate the controls, policies and procedures, and systems in place to safeguard University assets.
 2. Evaluate the reliability and integrity of information, and the efficient and effective use of resources.
 3. Review compliance with policies, procedures, laws and regulations.
 4. Report results and make recommendations to administration and the Board of Visitors.

5. Assess the university risk management processes and bring any deficiencies or concerns to the attention of appropriate management personnel.
 6. Assist audit planning and scheduling activities with the Auditor of Public Accounts, Joint Legislative Audit and Review Commission, and other external audit or review organizations.
2. Administration
 1. Support the Internal Audit Office and communicate this support within their units.
 2. Participate in the audit process.
 3. Provide appropriate, clear, and consistent direction to the University community through written policies and procedures.
 4. Follow-up on progress of corrective actions for audit findings within their units.
 3. Auditee
 1. Cooperate with the audit process by providing unrestricted access to facilities, books and records, information, and personnel.
 2. Respond in writing, within 30 days, to all audit recommendations. Disagreements with recommendations or alternative solutions to identified findings are often acceptable. Each response should contain an estimated implementation date and responsible party.
 3. Implement agreed-upon corrective action programs.

III. Authorization

In the course of its work, Internal Audit has full and complete direct access to all University books, records (manual and electronic), physical properties, and personnel relevant to the subject of review. All documents and information given to Internal Audit during their work will be handled in the same prudent manner that the University expects of the employees normally accountable for them. ***The internal audit activity will have free and unrestricted access to the Board of Visitors.***

The Internal Audit Office has neither direct responsibility for, nor authority over, any of the activities, functions, or tasks it reviews. Accordingly, Internal Audit does not develop or write policies or procedures that they may later be called upon to evaluate. They may review draft materials, developed by management, for propriety and/or completeness. However, ownership of, and responsibility for, these materials remains with management, not Internal Audit.

IV. Audit Standards And Ethics

~~All audit work meets~~ ***The Office of Internal Audit's activities will be conducted in compliance with Longwood University's policies and procedures, as well as with*** the International Standards for the Professional Practice of Internal Auditing and Code of Ethics promulgated by the Institute of Internal Auditors, Inc. The department ***office*** is expected to consistently demonstrate high standards of conduct and ethics as well as appropriate judgment, independence, and discretion. Members maintain a professional image and protect auditee confidences and confidential information.

V. Selecting And Scheduling Audits

The Director prepares an annual Internal Audit Plan for approval by the Board of Visitors. Candidate projects come from a risk assessment process, recommendations by senior administration, regular coverage of large functional operations (cashiering, accounts payable, etc), and special requests.

VI. Reporting

All audit work is summarized in timely written reports distributed to an appropriate list of recipients. In general, reports are distributed to all members of the Board of Visitors, the President, the Vice President responsible for the auditee department, the Auditor of Public Accounts, as well as the auditee, their immediate supervisor, and other department heads affected by audit findings. Special request reports may have a more limited distribution.

Internal Audit will provide administration with adequate time to prepare responses to audit report findings before distributing the reports to appropriate recipients outside of University management.

A summary of all work performed during the current fiscal year will be prepared and presented to the Board of Visitors on a quarterly basis.

Approved by the Board of Visitors, September 10, 2010.
Revised and approved by the Board of Visitors,

CONSENT AGENDA

Approval of Experiential Learning Policy

RATIONALE: As recently as 1999, Longwood recognized the need for experiential learning as a component of the now defunct Bachelor of General Studies. Within the framework of that program, Longwood affirmed that "Credit for experiential learning may be requested for college level learning acquired through certain life/work experiences." This option was removed when the BGS Program was discontinued.

The new policy is needed to allow academic areas the flexibility to create non-traditional learning options for students in programs or situations where such options are deemed necessary and acceptable by the academic area.

POLICY: There are times when academic learning objectives may be satisfied completely outside the academic setting and still be compatible with academic work, thus worthy of academic credit. Care must be taken in order to establish that equivalent learning has occurred and that students are not being given credit for the same learning twice. Prior to entering the program students must be able to reasonably assess whether they will be awarded academic credit for their experiences. The Committee on Educational Policy, with the approval of the Faculty Senate, will maintain the process and forms required to ensure that programs that wish to have credit awarded for experiential learning have appropriate objectives, rubrics, and processes to satisfy this policy.

Experiential credit may not be used to satisfy General Education goals 1 - 10 or as part of the 30 credits of upper level courses required to be taken at Longwood.

CONSENT AGENDA

Approval of Guidelines on Award of Academic Credit for Military Education

The governing boards of each public institution of higher education shall, in accordance with guidelines developed by the State Council of Higher Education for Virginia, implement policies for the purpose of awarding academic credit to students for educational experience gained from service in the armed forces of the United States.

Longwood University is committed to serving the needs of its military and veteran populations. To that end, Longwood has reviewed its policies for the purpose of awarding academic credit to students for educational experiences gained from service in the armed forces and has developed the following policy to comply with the *Guidelines on Award of Academic Credit for Military Education, Training and Experience by Virginia Public Higher Education Institutions* (Code of Virginia 23-9.2:3.7 B).

Specifically, Longwood will:

1. Respect credit awarded by other accredited institutions to the greatest extent possible. A grade of a C or better is required for courses to be considered for transfer unless otherwise specified in an articulation agreement.
2. Award credit consistent with the American Council on Education (ACE) Guide to the Evaluation of Educational Experiences in the Armed Services and those transcribed by the Community College of the Air Force (CCAF) for which Longwood has comparable courses.
3. Award credit for successful performance on College Board College Level Examination Program (CLEP), Advanced Placement (AP) and International Baccalaureate (IB). Minimum required scores are posted on the website. Students may also receive credit for DSST or Excelsior College exams with appropriate scores if Longwood has a comparable course. Longwood also recognizes these credits as posted if included in an associate degree covered by an articulation agreement.
4. Award two hours of credit to all honorably discharged military students for PHED 101 (General Education Goal 11).
5. Require students to complete at least 25% of their degrees to include at least 30 credits at the upper level through Longwood. Students enrolling in the Nursing Program will most likely be required to complete more than 25% of their degree at Longwood. Academic residency requirements will be shared with students at acceptance.
6. Provide accepted students with unofficial evaluations of transfer credits at acceptance. After the student has indicated their intent to enroll and Longwood has received official transcripts, official evaluations will be available online. The Office of Registration will consistently award credit when course matches are obvious and when courses have been previously evaluated. Academic departments will evaluate credits at the request of the Office of Registration when they are unable to determine equivalencies.

7. Provide a mechanism for students not satisfied with the evaluation of any course. The student may complete a form available online and provide supporting documentation to include a course description to have the course reviewed. Explanations based on educationally grounded rationale will be provided in response to the submitted forms.

The policy above will be posted online as will the contact information for a designated staff member.

CONSENT AGENDA

Approval of Master of Education M.Ed. in School Librarianship

School Library Media has been offered as a concentration in the Master of Science in Education at Longwood University since Fall 1989. There has been encouragement from staff of the State Council of Higher Education for Virginia (SCHEV) that several highly productive concentrations within the M.S. in Education degree become stand-alone programs. School Librarianship is being proposed as the first of those stand-alone programs.

A new degree, the Master of Education (M.Ed) in School Librarianship, is proposed by the Department of Education and Special Education, which is housed in the College of Education and Human Services. Assuming approval by the State Council Higher Education in Virginia (SCHEV), implementation is planned for the Fall 2014 semester. The purpose of the program is to prepare teachers to be PreK-12 school librarians.

Longwood offers one of the two nationally recognized programs in Virginia preparing teachers to be school librarians.

The Integrated Postsecondary Education Data System now offers a Classification of Instructional Programs (CIP) code, 13.1334, for School Librarian/Library Media Specialist, defined as "A program that prepares individuals to serve as librarians and media specialists in elementary and secondary schools as well as special instructional centers." Longwood's new M.Ed. program would appropriately fit under this CIP code.

The proposed Master of Education in School Librarianship, scheduled to be implemented in Fall 2014, is fully aligned with the 2010 American Library Association and American Association of School Librarians (*ALA/AASL Standards for Initial Preparation of School Librarians*). The degree of Master of Education in School Librarianship will better reflect for graduates the true course of study that they have completed.

CONSENT AGENDA

INFORMATION ITEM

Animal Use and Care Committee

Federal animal welfare regulations require that an Institutional Animal Care and Use Committee (IACUC) review and approve all activities involving the use of vertebrate animals prior to their initiation. This includes any animals used for the development of experimental methodologies, instructional purposes, research, etc.

Longwood must separate the current Human and Animal Research Committee into two separate committees because a number of grant funding agencies will not fund a grant if the institution does not have a standing Animal Care and Use Committee.

RATIONALE: The definitive source for internal control in the Commonwealth is the Agency Risk Management and Internal Control Standards (ARMICS). In conjunction with our agency-level internal control assessment, we need to ask questions relative to integrity and ethical behavior. Such questions are used to assess the institution's control environment. A University Code of Ethics policy will help define expectations in that regard. The current Policy #4110-Financial Operations Code of Ethics will be deleted. New policy language is indicated in bold italics. Language that is to be deleted is indicated with strikethroughs.

Policy 1000

University Code of Ethics

I. Purpose

The purpose of this statement/policy is to comply with the requirement for an ethics policy to be written by all agencies of the Commonwealth. This requirement is part of the Agency Risk Management and Internal Control Standards (ARMICS) implemented by the Virginia Department of Accounts.

II. Statement/Policy

Longwood University is committed to lawful and ethical behavior in the performance of all its activities. We, as members of the Longwood community, will

- Perform our public responsibilities ethically, competently, efficiently and honestly in observance of laws, regulations and policies applicable to university activities.***
- Protect and preserve university resources and ensure their proper use, with periodic auditing of functions and departments by the State Auditor of Public Accounts and/or Longwood's Internal Auditor to ensure that proper controls are in place and observed to safeguard public resources.***
- Avoid both conflicts of interest and the appearance of such conflicts, promptly disclosing conflicting interests or influences.***
- Make procurement decisions impartially and objectively, avoiding improper influence in the performance of our public duties.***
- Safeguard confidential information, ensuring that confidential records or other nonpublic information is not externally disclosed without appropriate authorization.***
- Maintain effective internal controls to prevent fraud, theft or the misuse of university funds or property, and to safeguard the integrity of our activities.***
- Treat others with dignity and respect, ensuring that no discrimination or harassment exists in carrying out university activities.***

- *Conduct communications on behalf of the university with all persons, including co-employees, clients, customers, students, guests and vendors, with professionalism and civility.*
- *Strive for continuous improvement in our performance of public duties for the University, mindful that our activities must be reasonable and appropriately authorized.*
- *Report any illegal or unethical action that comes to our attention, so that the university can investigate such actions and take corrective measures.*

Approved by the Board of Visitors,

RATIONALE: This policy is being updated to coincide with DOA requirements that state agencies are not required to control/track assets valued at less than \$5,000. Longwood's existing policy states our controllable threshold to be \$2,000. Modifications to this policy will coincide with DOA requirements and also lessen inventory tracking. New policy language is indicated in bold italics. Language that is to be deleted is indicated with strikethroughs.

Policy 4204

Fixed Assets Management

I. Purpose

The University has a significant investment in fixed assets, such as land, buildings, fixed and moveable equipment, which are used to carry on the institution's mission and objectives. The purpose of this policy is to ensure that the University's fixed assets are acquired, safeguarded, controlled, disposed of, and accounted for in accordance with state and federal regulations, audit requirements, and generally accepted accounting principles.

II. Policy

The Commonwealth Accounting Policies and Procedures (CAPP) Manual requires that all state agencies maintain an accurate inventory of fixed assets. Failure to maintain proper internal control over fixed assets could result in the University not achieving management standards if lack of control is determined to be a significant audit finding. Additionally, Office of Management and Budget Circular A-110: Uniform Administrative Requirements for Grants and Other Agreements with Institutions of Higher Education, Hospitals, and Other Non-Profit Organizations requires that the University maintain a detailed record of equipment and that no less than every two years a complete and accurate physical inventory be completed.

The University will comply with state and federal policies relative to fixed asset management. Instances where testing by Fixed Asset Accounting, Internal Audit or the Auditor of Public Accounts reveals an excessive amount of items not properly reflected in the fixed asset records will be reported to the President and area Vice President.

The Assistant Vice President for Financial Operations is responsible for the coordination, development and implementation of policies and procedures that comprise the university-wide fixed asset system. This system facilitates internal controls over the acquisition, disposal and inventory information of fixed assets, and enables the University to comply with federal and state regulations and meet regulatory or audit reporting requirements. Responsibility for maintaining the integrity of asset data in the system lies with the departmental fixed asset custodian, through proper notification of all changes to Fixed Assets Accounting. Updating the fixed asset system on a timely basis to record changes in the operational status, location or demographic information about fixed assets is the responsibility of Fixed Assets Accounting. Procedures and forms relative to fixed asset management are located on the Fixed Assets webpage.

1. Fixed Asset Criteria

Fixed assets tracked in Longwood's asset system are divided into three categories: capital,

controllable and Equipment Trust Fund. Capital assets are those with an expected useful life greater than one year and a cost of \$5,000 or more. Controllable assets ~~are assets with a useful life of greater than one year and a cost between \$2,000 and \$4,999 and~~ **include** technology items ~~that meet either of the following criteria: (1) cost of \$500 or more; in which (2) theft or loss of such items would represents a significant risk to the~~ University (including, but not limited to, computers, netbooks, iPads, iPods, Kindles, iPhones or other mobile technology). This requirement does not apply to portable media such as USB drives. Equipment Trust Fund (ETF) assets are those costing \$500 or more and funded by bonds issued through the Virginia College Building Authority (VCBA).

Items representing construction in progress are not entered into the fixed asset system until the construction or renovation is substantially complete. The classification of a renovation as a fixed asset depends upon the significance of the renovation to the structure.

2. Fixed Asset Classifications and Capitalization Thresholds

1. **Land** - Real estate without any land improvements.
Capitalization Threshold: \$5,000
2. **Infrastructure**- Improvements not specifically identifiable to an individual building, to include parking lots, fencing, sidewalks, irrigation/drainage systems, tunnels, signs and lighting. Capitalization Threshold: \$5,000
3. **Buildings** - Real estate used for shelter, dwelling or other similar agency purposes.
Capitalization Threshold: \$5,000
4. **Building Improvements** - Improvements subsequent to initial building construction.
Capitalization Threshold: \$100,000
5. **Construction In Progress** - Temporary capitalization of labor, materials and equipment of buildings or other capital assets/projects that are being constructed.
Capitalization Threshold: \$5,000
6. **Equipment** - Fixed equipment includes equipment affixed to the building; moveable equipment includes office furniture, fixtures, machines, window air conditioning units, medical, laundry, and kitchen equipment, and vehicles.
Equipment Capitalization Threshold: \$5,000

Fixed Equipment Improvements/Replacements Capitalization Threshold: \$50,000

7. **Library Books**- Periodicals, journals, books of reference and other books for use in libraries. Capitalized at actual cost of acquisition.
8. **Intangible Assets** - Include software, patents, trademarks, copyrights, land and water use rights, easements and right-of-ways.
Software Capitalization Threshold: \$25,000

Other Intangibles Capitalization Threshold: \$100,000

3. Equipment Trust Fund (ETF) Program Assets -

The ETF Program provides funding that allows higher education institutions to purchase equipment for instructional use. Equipment purchased with ETF funds is not owned by the University, but is tied to facilities agreements with the Virginia College Building

Authority (VCBA). Once a facilities agreement has been satisfied, ownership passes to the University. In addition to general rules applicable to all equipment, specific guidelines apply to the acquisition, maintenance, and disposal of ETF equipment. ETF equipment:

1. Must be used in programs of instruction, research and academic support throughout its useful life or until ownership passes to Longwood.
 2. Is eligible for surplus only after ownership passes to Longwood.
 3. Must be replaced with departmental funds if lost or stolen.
 4. Must be an individual item that costs at least \$500 or must be a functional unit where the aggregate cost of individual components is \$500 or greater. Components of a functional unit perform a specific task and must remain assembled as a unit.
 5. Must be decaled within 45 days of receipt for identification and tracking purposes.
 6. Must be maintained in good working condition by the department and must be physically located in accordance with fixed asset records.
4. Fixed Asset Ownership and Custody
Each department is responsible for designating a fixed asset custodian. This individual is responsible for accurately maintaining the fixed asset inventory for the department. All fixed assets are owned by the University and not by a specific individual, department or other operating unit. Generally, the University has sole ownership of all equipment acquired regardless of source of funding or method of acquisition with the following exceptions:
1. Equipment acquired through sponsored projects where the federal government or other sponsor retains title to the equipment or where the sponsor furnishes equipment merely for the duration of the project;
 2. Equipment on short-term loan from another institution;
 3. Leased equipment;
 4. Equipment Trust Fund equipment until terms of Facilities Agreement are met
5. Inventory of Fixed Assets
Fixed asset custodians are responsible for conducting an annual inventory within their respective department. Inventory listings are provided once a year by the Fixed Assets Accounting Office from the University's inventory system. The custodian is responsible for ensuring that asset information is correct, providing information to update the fixed asset system to reflect necessary changes, and completing a "Certification of Completion" form indicating that the inventory has been completed and is accurate.
6. Acquisition/Addition of Fixed Assets
The "Addition to Fixed Assets Inventory" form must be completed by the fixed asset custodian to document fixed assets acquired through donation, fabrication, transfer from other universities or agencies, or simply found in the department and not listed on the department's inventory report. The form must be submitted electronically to Fixed Assets Accounting within five days of receipt (or discovery) of the fixed asset. Capital Planning is responsible for providing information concerning construction and renovations, excluding equipment.

Departments receiving a gift-in-kind (gifts other than cash and securities) should notify

the Foundation immediately upon receipt, as failure to comply with IRS regulations could result in a loss of the tax deduction to the donor and/or penalties to the University.

7. Fixed Asset Tagging

Materiel Management personnel are responsible for the physical tagging of University assets. Assets meeting the criteria are identified with tags that are affixed to the asset unless not physically practicable. Assets purchased with University funds are identified by a blue Longwood University asset tag. Assets purchased with ETF funds are identified with a red Longwood University asset tag. Items needing to be re-tagged are issued a white polyester tag. Assets may also be engraved. Assets that do not have tags or engraving are identified as such in the fixed asset system.

8. Disposal or Transfer of Fixed Assets

Fixed asset custodians are responsible for safeguarding all equipment and other fixed assets assigned to their department, including items no longer needed, until the Surplus Property Report is signed and the items have been removed by Materiel Management or a completed transfer form is received by Fixed Assets Accounting. Custodians are responsible for recording any disposals or transfers of assets by completing and submitting required forms within five days of disposal or transfer. Unallowable and allowable disposals and transfers include:

1. **Unallowable disposals and transfers**

1. Sale of assets by a department (permitted through surplus property only)
2. Gift or transfer outside of the University (except for federal research equipment which may be transferred with appropriate federal approval)

2. **Allowable disposals and transfers**

1. Stolen assets (Theft to be reported to Campus Police.)
2. Assets destroyed (Loss due to fire, flood, etc. to be reported to Risk Management.)
3. Surplus property
4. Trade-in for new equipment
5. Transfers to other University departments or other state agencies/institution

9. Transfer of Fixed Assets to Offsite Locations

Equipment may be utilized off campus for **University business only**, when appropriately authorized. Authorization does **not** grant permission for personal use, use by third-party contractors, or use for non-University purposes. Offsite equipment is subject to the same University and Commonwealth rules and custodial responsibilities as on-premise equipment. The custodian for each department is responsible for maintaining the appropriate records to track the location of any equipment that is being utilized away from University premises.

10. Depreciation/Amortization of Fixed Assets

The University uses the straight-line method of depreciation/amortization for all depreciable/amortizable fixed assets (land and construction-in-progress are not depreciated). Useful lives are based on information provided by the Commonwealth Accounting Policies and Procedures (CAPP) Manual. Useful lives are subject to modification if facts and circumstances at the University differ from these guidelines.

Approved by the Board of Visitors, December 2, 2011.

Revised and approved by the Board of Visitors, June 15, 2012.

Revised and approved by the Board of Visitors, December 7, 2012.

Six-Year Plans - Part I (2013): 2014-16 through 2018-20

Due: July 1, 2013

Institution: Longwood University

Institution UNITID: 232566

Individual responsible for plan

Name: W. Taylor Reveley, IV - President
Email address: reveleywt@longwood.edu
Telephone number: 434-395-2001

Six-Year Plans - Part I (2013): 2014-16 through 2018-20
Longwood University
ACADEMIC AND FINANCIAL PLAN

Instructions: In the column entitled "Academic and Support Service Strategies for Six-Year Period (2014-2020)," please provide title to identify strategies (for the three biennia of this six-year period) associated with each objective of the "Preparing for the Top Jobs of the 21st Century: The Virginia Higher Education Opportunity Act of 2011." Please use this title to identify a more detailed description of the strategy in the separate Word document.

Priority Ranking	Strategies (Short Title)	TJ21 Objectives	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2014-2020)											
			Biennium 2014-2016 (7/1/14-6/30/16)		Biennium 2016-2018 (7/1/16-6/30/18)		Biennium 2018-2020 (7/1/18-6/30/20)		Strategies		Strategies			
			Cost	Incremental, Savings, Reallocation	Cost	Incremental, Savings, Reallocation	Cost	Incremental, Savings, Reallocation	Strategies	Strategies				
			Amount	Within Increase	Amount	Within Increase	Amount	Within Increase						
1	Improve Retention and Graduation Rates	E5	Incremental:	\$1,000,000	\$1,000,000	\$0	\$0							
			Savings:	\$0	\$0	\$0	\$0							
2	Enhance Student Success Program	E5	Incremental:	\$142,810	\$142,810	\$285,621	\$285,621							
			Savings:	\$0	\$0	\$0	\$0							
	Implement the Quality Enhancement Plan (QEP)	E12	Incremental:	\$0	\$0	\$200,000	\$200,000							
			Savings:	\$0	\$0	\$0	\$0							
	Implement a New Degree Audit System	E3	Incremental:	\$0	\$0	\$0	\$0							
			Savings:	\$0	\$0	\$0	\$0							
	Review and Revise General Education Requirements	E3	Incremental:	\$125,000	\$0	\$0	\$0							
			Savings:	\$0	\$0	\$0	\$0							
5	5-Year (4+1) Masters in Math/Science Secondary Teaching	E4, E6	Incremental:	\$210,000	\$210,000	\$210,000	\$210,000							
			Savings:	\$0	\$0	\$0	\$0							
	Explore the Development of New Health Profession Degrees	D, E6	Incremental:	\$0	\$0	\$0	\$0							
			Savings:	\$0	\$0	\$0	\$0							
7	Develop a RN to BSN Program	D, E6	Incremental:	\$30,000	\$0	\$0	\$0							
			Savings:	\$0	\$0	\$0	\$0							
	Hire Essential Staff for Expanding BS in Nursing Program	E6	Incremental:	\$104,804	\$104,804	\$104,804	\$104,804							
			Savings:	\$0	\$0	\$0	\$0							
6	Expand the Cyber Security Initiative	E6	Incremental:	\$130,000	\$130,000	\$130,000	\$130,000							
			Savings:	\$0	\$0	\$0	\$0							
	Implement the Center for Excellence in Environmental Education (CE ²) Initiative	D, E6	Incremental:	\$0	\$0	\$119,488	\$119,488							
			Savings:	\$112,524	\$0	\$112,524	\$0							
	Expand Undergraduate Research in the Sciences	E6	Incremental:	\$0	\$0	\$0	\$0							
			Savings:	\$0	\$0	\$0	\$0							
3	Additional Faculty Positions	E1	Incremental:	\$176,952	\$176,952	\$363,904	\$363,904							
			Savings:	\$0	\$0	\$0	\$0							
	Admissions Counselors	E1	Incremental:	\$30,264	\$30,264	\$60,528	\$60,528							
			Savings:	\$0	\$0	\$0	\$0							

Six-Year Plans - Part I (2013): 2014-16 through 2018-20
Longwood University
ACADEMIC AND FINANCIAL PLAN

Instructions: in the column entitled "Academic and Support Service Strategies for Six-Year Period (2014-2020)," please provide title to identify strategies (for the three biennia of this six-year period) associated with each objective of the "Preparing for the Top Jobs of the 21st Century: The Virginia Higher Education Opportunity Act of 2011." Please use this title to identify a more detailed description of the strategy in the separate Word document.

Priority Ranking	Strategies (Short Title)	TJ21 Objectives	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2014-2020)						Strategies	Strategies	Biennium 2018-2020 (7/1/18-6/30/20)		
			Biennium 2014-2016 (7/1/14-6/30/16)		Biennium 2016-2018 (7/1/16-6/30/18)		Biennium 2014-2020						
			Cost: Incremental, Savings, Reallocation		Cost: Incremental, Savings, Reallocation		Within Increase						
2014-2015		2015-2016		2014-2015		2015-2016		2014-2015		2015-2016			
Amount		Amount		Amount		Amount		Amount		Amount			
	Explore Offering Dual Enrollment Pre-Education Courses	D, E3	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Explore Offering Dual Enrollment Pre-Education Courses.	
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Develop Cooperative Agreement with SVCC	C	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0		
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Develop Off-Site Programs and Clinical Placements	D, E1	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Continue to support the addition of degree program offerings in underserved remote rural areas.	Continue to support the addition of degree program offerings in underserved remote rural areas.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Develop a Collaborative Early Childhood Inclusive Program	D, E1	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Incremental: \$88,476	Continue Collaborative Early Childhood Inclusive Program.	Continue Collaborative Early Childhood Inclusive Program.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Develop a MS Degree in Social Work	D, E1	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Continue MS Degree in Social Work.	Continue MS Degree in Social Work. Hire an additional faculty member.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Initiate a Graphic Design Animation and Simulation Program	D, E6	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Incremental: \$188,976	Continue Graphic Design Animation and Simulation Program.	Continue Graphic Design Animation and Simulation Program.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Expand Faculty Resources in Therapeutic Recreation	E6	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Incremental: \$94,488	Continue funding of additional faculty position required to expand Therapeutic Recreation Program.	Continue funding of additional faculty position required to expand Therapeutic Recreation Program.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Optimal Year-Round Use of Facilities and Resources	B, E3	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Incremental: \$0	Expand J-Term.	Expand J-Term.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Development of Instructional Resource-Sharing with Other Institutions in the Commonwealth	C, E8	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Incremental: \$15,000	Develop a Collaborative Research Program with other institutions. A director will be hired in 2016-18 to oversee and coordinate the operation of the collaborative program.	Continue Collaborative Research Program with other institutions.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Increase Technology-Enhanced Instruction, Including Course Redesign, Online Instruction, and Resource Sharing Among Institutions	E10	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Incremental: \$90,000	Continue funding distance learning initiatives.	Continue funding distance learning initiatives.
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
	Increase Research, Including Regional and Public-Private Collaboration	E8	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000	Incremental: \$55,000		
			Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0	Savings: \$0		
			Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0	Reallocation: \$0		
Total 2014-2016 Costs													
Incremental (Included in Financial Plan line 61)			\$2,311,770	\$2,311,770	\$2,311,770	\$2,311,770	\$2,311,770	\$2,311,770	\$2,311,770	\$2,311,770	\$2,311,770		
Savings			\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Reallocation			\$262,524	\$262,524	\$262,524	\$262,524	\$262,524	\$262,524	\$262,524	\$262,524	\$262,524		

Six-Year Plans - Part I (2013): 2014-16 through 2018-20
Longwood University
ACADEMIC AND FINANCIAL PLAN

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Priority Ranking	Biennium 2014-2016 (7/1/14-6/30/16)		Biennium 2016-2018 (7/1/16-6/30/18)		Biennium 2018-2020 (7/1/18-6/30/20)	
	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2014-2020)					
	Strategies (Short Title)	TU21 Objectives	Cost: Incremental, Savings, Reallocation		Strategies	
		2014-2015	2015-2016			Strategies
		Amount	Amount			Strategies
		Within Increase	Within Increase			Strategies
		Amount	Amount			Strategies
		Within Increase	Within Increase			Strategies

Six-Year Financial Plan for Educational and General Programs, Incremental Operating Budget Need
2014-2016 Biennium
 (Assuming No Additional General Fund)

Items	2014-2015		2015-2016	
	Amount	Within Increase	Amount	Within Increase
Total Incremental Cost from Academic Plan³	\$2,311,770	\$2,311,770	\$2,420,370	\$2,420,370
Increase Faculty Salaries ¹	\$0	\$0	\$0	\$0
Faculty Salary Increase Rate ²	0.00%	0.00%	0.00%	0.00%
Increase number of Full-Time Faculty (FTE) ⁴	8.00	8.00	13.00	13.00
Increase number of Administrative Professional (FTE) ⁴	3.00	3.00	7.00	7.00
Increase number of Classified Staff - Other (FTE) ⁴	0.00	0.00	0.00	0.00
8 O&M for New Facilities (\$)	\$79,763	\$79,763	\$106,350	\$106,350
O&M for New Facilities (FTE)	1.00	1.00	1.00	1.00
Utility Cost Increase	\$100,000	\$100,000	\$200,000	\$200,000
NGF share of state authorized salary increase/bonus	\$0	\$0	\$0	\$0
NGF share of state health insurance benefit increase	\$350,000	\$350,000	\$700,000	\$700,000
VRS increase	\$0	\$0	\$0	\$0
Additional In-State Student Financial Aid From Tuition Revenue (Honors)	\$80,000	\$80,000	\$80,000	\$80,000
Other Fixed Costs (maintenance contracts, etc.)	\$300,000	\$300,000	\$600,000	\$600,000
Faculty Equity, Retention & Promotion Pool, A/P and Classified Equity & Retention Pool ⁵	\$600,000	\$600,000	\$1,200,000	\$1,200,000
4 Total Additional Funding Need	\$3,821,533	\$3,821,533	\$5,306,720	\$5,306,720

- Notes:
- (1) If planned, enter the cost of any institution-wide increase.
 - (2) Enter planned annual faculty salary increase rate. Any salary increase entered here will be counted when calculating the gap to reach the 60th percentile in the future.
 - (3) A pool of funds will be established to be used to address salary compression issues, promotion, as well as funds to retain high-quality faculty and staff who have been offered positions outside of the University. Some employees may receive no increase and others will receive varying amounts. - these funds will not be given to faculty or staff across-the-board. A salary study was conducted by an outside firm in 2012. Results of this study will be utilized to determine who would be eligible for an increase. This represents the third and fourth years of a multi-year plan to address salary issues.
 - (4) Position costing reflected in respective Academic strategy within the Academic and Finance Plan Section.

Six-Year Plans - Part I (2013): 2014-16 through 2018-20

Longwood University

Six-Year Financial Plan for Tuition and Fee Increases and Nongeneral Fund Revenue Estimates

Items	2012-2013 (Actual)			2013-2014 (Estimated)			2014-2015 (Planned)			2015-2016 (Planned)		
	Student Charge	Total Revenue	Rate Increase	Student Charge	Total Revenue	Rate Increase	Student Charge	Total Revenue	Rate Increase	Student Charge	Total Revenue	Rate Increase
E&G Programs												
Undergraduate, In-State	\$6,180	\$24,849,420	4.4%	\$6,450	\$25,963,055	4.4%	\$7,230	\$29,129,657	12.1%	\$7,530	\$30,340,427	4.1%
Undergraduate, Out-of-State	\$18,510	\$3,185,062	4.4%	\$19,320	\$3,730,641	4.4%	\$21,270	\$4,120,866	10.1%	\$22,110	\$4,286,686	3.9%
Graduate, In-State	\$6,648	\$1,978,992	4.3%	\$6,936	\$1,839,249	4.3%	\$7,776	\$2,068,684	12.1%	\$8,088	\$2,153,017	4.0%
Graduate, Out-of-State	\$18,912	\$260,768	4.3%	\$19,728	\$256,479	4.3%	\$21,744	\$283,443	10.2%	\$22,608	\$294,999	4.0%
Other E&G Revenue		\$2,251,750			\$2,229,950			\$2,238,257			\$2,250,965	
Total E&G Revenue - Gross		\$32,525,992			\$34,019,374			\$37,840,907			\$39,326,094	
Total E&G Revenue - Net of Financial Aid		\$30,979,535			\$32,199,374			\$35,940,907			\$37,426,094	
Auxiliary Program												
Mandatory Non-E&G Fees												
Undergraduate	\$4,710		3.8%	\$4,890		3.8%	\$5,040		3.1%	\$5,190		3.0%
Graduate	\$2,952		4.1%	\$3,072		4.1%	\$3,144		2.3%	\$3,216		2.3%
Total Auxiliary Revenue (ALL including room and board)		\$46,130,871			\$48,622,181			\$50,213,379			\$51,845,076	
Total Tuition and Fees												
Undergraduate, In-State	\$10,890		4.1%	\$11,340		4.1%	\$12,270		8.2%	\$12,720		3.7%
Undergraduate, Out-of-State	\$23,220		4.3%	\$24,210		4.3%	\$26,310		8.7%	\$27,300		3.8%
Graduate, In-State	\$9,600		4.3%	\$10,008		4.3%	\$10,920		9.1%	\$11,304		3.5%
Graduate, Out-of-State	\$21,864		4.3%	\$22,800		4.3%	\$24,888		9.2%	\$25,824		3.8%
Student Financial Aid												
		\$1,546,457			\$1,820,000			\$1,900,000			\$1,900,000	
Sponsored Programs (Program 110)												
		\$3,178,393			\$3,178,393			\$3,178,393			\$3,178,393	
Unique Military Activities												
		\$0			\$0			\$0			\$0	
Workforce Development												
		\$0			\$0			\$0			\$0	
Other (Specify)												
		\$0			\$0			\$0			\$0	

Six-Year Plans - Part I (2013): 2014-16 through 2018-20

Longwood University

FINANCIAL AID PLAN

Note: If you do not have actual amounts for Tuition Revenue for Financial Aid by student category, please provide an estimate. If values are not distributed for Tuition Revenue for Financial Aid, a distribution may be calculated for your institution.

Allocation of Tuition Revenue Used for Student Financial Aid

2011-12 (Actual)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$23,941,760	\$1,336,587	5.6%	\$1,506,734
Undergraduate, Out-of-State	\$3,708,129	\$207,012	5.6%	\$155,250
Graduate, In-State	\$1,895,762	\$105,834	5.6%	\$0
Graduate, Out-of-State	\$224,821	\$12,551	5.6%	\$0
Total	\$29,770,472	\$1,661,984	5.6%	\$1,661,984
In-State Sub-Total	\$25,837,522	\$1,442,421	5.6%	\$1,506,734

2012-13 (Estimated)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$24,849,420	\$1,269,349	5.1%	\$1,388,897
Undergraduate, Out-of-State	\$3,185,062	\$162,698	5.1%	\$157,560
Graduate, In-State	\$1,978,992	\$101,090	5.1%	\$0
Graduate, Out-of-State	\$260,768	\$13,320	5.1%	\$0
Total	\$30,274,242	\$1,546,457	5.1%	\$1,546,457
Total from Finance-T&F worksheet	\$32,525,992	\$1,546,457	4.8%	
In-State Sub-Total	\$26,828,412	\$1,370,439	5.1%	\$1,388,897

2013-14 (Planned)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$25,963,055	\$1,486,430	5.7%	\$1,662,000
Undergraduate, Out-of-State	\$3,730,641	\$213,586	5.7%	\$158,000
Graduate, In-State	\$1,839,249	\$105,300	5.7%	\$0
Graduate, Out-of-State	\$256,479	\$14,684	5.7%	\$0
Total	\$31,789,424	\$1,820,000	5.7%	\$1,820,000
Total from Finance-T&F worksheet	\$34,019,374	\$1,820,000	5.3%	
In-State Sub-Total	\$27,802,304	\$1,591,730	5.7%	\$1,662,000
Additional In-State	\$973,892	\$221,291	22.7%	\$273,103

2014-15 (Planned)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$29,129,657	\$1,551,691	5.3%	\$1,742,000
Undergraduate, Out-of-State	\$4,120,866	\$222,859	5.4%	\$158,000
Graduate, In-State	\$2,068,684	\$110,137	5.3%	\$0
Graduate, Out-of-State	\$283,443	\$15,313	5.4%	\$0
Total	\$35,602,650	\$1,900,000	5.3%	\$1,900,000
Total from Finance-T&F worksheet	\$37,840,907	\$1,900,000	5.0%	
In-State Sub-Total	\$31,198,341	\$1,661,828	5.3%	\$1,742,000
Additional In-State	\$3,396,037	\$70,098	2.1%	\$80,000
Additional In-State from Financial Plan		\$80,000	#DIV/0!	

2015-16 (Planned)

T&F Used for Financial Aid	Gross Tuition Revenue	Tuition Revenue for Financial Aid *	% Revenue for Financial Aid	Distribution of Financial Aid
Undergraduate, In-State	\$30,340,427	\$1,552,386	5.1%	\$1,742,000
Undergraduate, Out-of-State	\$4,286,686	\$222,812	5.2%	\$158,000
Graduate, In-State	\$2,153,017	\$109,617	5.1%	\$0
Graduate, Out-of-State	\$294,999	\$15,185	5.1%	\$0
Total	\$37,075,129	\$1,900,000	5.1%	\$1,900,000
Total from Finance-T&F worksheet	\$39,326,094	\$1,900,000	4.8%	
In-State Sub-Total	\$32,493,444	\$1,662,003	5.1%	\$1,742,000
Additional In-State	\$1,295,103	\$175	0.0%	\$0
Additional In-State from Financial Plan		\$80,000	#DIV/0!	

* As Longwood University cannot report with certainty sources specifically allocable by student category, the "Tuition Revenue for Financial Aid" amounts were calculated on the basis of proportional gross tuition revenue.

Six-Year Plans - Part I (2013): 2014-16 through 2018-20 Longwood University

Foregone Tuition Revenue As A Result of Tuition Waivers (See references at bottom of tables for waiver programs)
Educational and General Programs

The values entered for 2011-12 must match those submitted on the SCHEV S1/S2.									
Program	2011-12 (Actual from S1/S2)								
	In-State		Total	Out-of-State		Total	Total		
	Undergraduate	Graduate		Undergraduate	Graduate		Undergraduate	Graduate	Total
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$0	\$55,950	\$0	\$0	\$55,950	\$55,950
Virginia's military dependent waivers	\$66,955	\$2,238	\$69,193	\$0	\$0	\$0	\$0	\$0	\$69,193
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers									
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty									
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$0	\$32,982	\$0	\$0	\$32,982	\$32,982
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$0	\$52,643	\$0	\$0	\$52,643	\$52,643
Senior Citizen's Tuition and Fee Waivers	\$8,607	\$4,446	\$13,053	\$0	\$0	\$0	\$0	\$0	\$13,053
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$112,740	\$1,536	\$114,276	\$0	\$0	\$0	\$0	\$0	\$114,276
Employee Waivers	\$15,815	\$37,882	\$53,697	\$0	\$0	\$0	\$0	\$0	\$53,697
Other waivers of tuition/fees student would normally be charged	\$78,909	\$29,151	\$108,060	\$0	\$0	\$0	\$0	\$0	\$108,060
Total	\$283,026	\$75,253	\$358,279	\$0	\$141,575	\$0	\$141,575	\$141,575	\$499,854

2012-13 (Estimated)							
Program	In-State			Out-of-State			Total
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$56,000	\$0	\$56,000	\$56,000
Virginia's military dependent waivers	\$70,000	\$3,000	\$73,000	\$0	\$0	\$0	\$73,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers							
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$33,000	\$0	\$33,000	\$33,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$54,000	\$0	\$54,000	\$54,000
Senior Citizen's Tuition and Fee Waivers	\$9,000	\$5,000	\$14,000	\$0	\$0	\$0	\$14,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$115,000	\$2,000	\$117,000	\$0	\$0	\$0	\$117,000
Employee Waivers	\$17,000	\$38,000	\$55,000	\$0	\$0	\$0	\$55,000
Other waivers of tuition/fees student would normally be charged	\$83,000	\$30,000	\$113,000	\$0	\$0	\$0	\$113,000
Total	\$294,000	\$78,000	\$372,000	\$143,000	\$0	\$143,000	\$515,000

2013-14 (Planned)									
Program	In-State			Out-of-State			Total		
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total			
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Foreign exchange student waivers	\$0	\$0	\$0	\$58,000	\$0	\$58,000	\$58,000		
Virginia's military dependent waivers	\$72,000	\$3,000	\$75,000	\$0	\$0	\$0	\$75,000		
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Virginia's military veteran waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Academic Common Market	\$0	\$0	\$0	\$34,000	\$0	\$34,000	\$34,000		
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$55,000	\$0	\$55,000	\$55,000		
Senior Citizen's Tuition and Fee Waivers	\$10,000	\$5,000	\$15,000	\$0	\$0	\$0	\$15,000		
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0		
Virginia Military Survivors & Dependents Education Program	\$118,000	\$2,000	\$120,000	\$0	\$0	\$0	\$120,000		
Employee Waivers	\$19,000	\$39,000	\$58,000	\$0	\$0	\$0	\$58,000		
Other waivers of tuition/fees student would normally be charged	\$86,000	\$31,000	\$117,000	\$0	\$0	\$0	\$117,000		
Total	\$305,000	\$80,000	\$385,000	\$147,000	\$0	\$147,000	\$532,000		

2014-15 (Planned)						
Program	In-State			Out-of-State		
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$60,000	\$0	\$60,000
Virginia's military dependent waivers	\$73,000	\$4,000	\$77,000	\$0	\$0	\$77,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers	\$0	\$0	\$0	\$0	\$0	\$0
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$35,000	\$0	\$35,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$56,000	\$0	\$56,000
Senior Citizen's Tuition and Fee Waivers	\$11,000	\$5,000	\$16,000	\$0	\$0	\$16,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$121,000	\$2,000	\$123,000	\$0	\$0	\$123,000
Employee Waivers	\$21,000	\$40,000	\$61,000	\$0	\$0	\$61,000
Other waivers of tuition/fees student would normally be charged	\$89,000	\$32,000	\$121,000	\$0	\$0	\$121,000
Total	\$315,000	\$83,000	\$398,000	\$151,000	\$0	\$151,000
						\$549,000

2015-16 (Planned)									
Program	In-State			Out-of-State			Total		
	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total	Undergraduate	Graduate	Total
Unfunded Scholarships	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Foreign exchange student waivers	\$0	\$0	\$0	\$62,000	\$0	\$62,000	\$62,000	\$0	\$62,000
Virginia's military dependent waivers	\$75,000	\$4,000	\$79,000	\$0	\$0	\$0	\$0	\$0	\$79,000
Virginia's military member waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia's military veteran waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Federal military member and dependent waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia provision for other state's National Guard duty	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Special arrangement contracts	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Academic Common Market	\$0	\$0	\$0	\$36,000	\$0	\$36,000	\$36,000	\$0	\$36,000
Geographic waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Other waivers associated with in-/out-of-state differential	\$0	\$0	\$0	\$57,000	\$0	\$57,000	\$57,000	\$0	\$57,000
Senior Citizen's Tuition and Fee Waivers	\$12,000	\$5,000	\$17,000	\$0	\$0	\$0	\$0	\$0	\$17,000
Certain Public Safety Personnel Child/Spouse Waivers	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0
Virginia Military Survivors & Dependents Education Program	\$124,000	\$2,000	\$126,000	\$0	\$0	\$0	\$0	\$0	\$126,000
Employee Waivers	\$23,000	\$41,000	\$64,000	\$0	\$0	\$0	\$0	\$0	\$64,000
Other waivers of tuition/fees student would normally be charged	\$92,000	\$33,000	\$125,000	\$0	\$0	\$0	\$0	\$0	\$125,000
Total	\$326,000	\$85,000	\$411,000	\$155,000	\$0	\$155,000	\$155,000	\$0	\$566,000

Program	FA File Field	Authorization
Unfunded Scholarships	TUIWAIV, IN-1	Code of Virginia § 23-31
Foreign exchange student waivers	TUITION=H	Code of Virginia § 23-7.4.2 C 2
Virginia's military dependent waivers	TUITION=B	Code of Virginia § 23-7.4 E
Virginia's military member waivers	TUITION=M	Code of Virginia § 23-7.4.2 G
Virginia's military veteran waivers	TUITION=U	Code of Virginia § 23-7.4.2 H
Federal military member and dependent waivers	TUITION=R	Federal Higher Education Opportunity Act (Sec. 114)
Virginia provision for other state's National Guard duty	TUITION=T	Code of Virginia § 23-7.4.2 B
Special arrangement contracts	TUITION=I	Code of Virginia § 23-7.4.2 F
Academic Common Market	TUITION=C	Code of Virginia § 23-7.4.2 C 1
Geographic waivers		
Virginia Community College System	TUITION=D	Code of Virginia § 23-7.4.2 D
University of Virginia's College at Wise	TUITION=E	Code of Virginia § 23-7.4.2 E
Old Dominion University's TELETECHNET sites/higher education centers; Radford's Virginia Educators program	TUITION=P	Appropriation Act (ODU)
Other waivers associated with in-/out-of-state differential		
VCCS dual enrollment agreement	TUITION=F	Code of Virginia § 23-7.4.2 C 3
Nonresident employed full time in Virginia provision	TUITION=G	Code of Virginia § 23-7.4.2 A
One-year grace period for dependent whose parent or spouse abandons Virginia domicile	TUITION=L	Code of Virginia § 23-7.4 B
Graduate student employed at a contract rate of \$4K+	TUITION=Q	Appropriation Act § 4-2.01 b 6
Senior Citizen's Tuition and Fee Waivers	TUIWAIV, IN-1	Code of Virginia § 23-38.54 et seq.
Certain Public Safety Personnel Child/Spouse Waivers	TUIWAIV, IN-1	Code of Virginia § 23-7.4:1 B
Virginia Military Survivors & Dependents Education Program	MSDTEFW, IN-7	Code of Virginia § 23-7.4:1 A
Other waivers of tuition/fees student would normally be charged	TUIWAIV, IN-1	Appropriation Act § 4-2.01 b 9

**LONGWOOD UNIVERSITY
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- A. *Mission – Please provide statement of institutional mission and indicate if there are plans to change the mission over the six-year period. Any changes to institutional mission must be formally submitted to SCHEV for review and approval.*

UNIVERSITY MISSION AND VISION STATEMENT:

The Mission

Longwood University is an institution of higher learning dedicated to the development of citizen leaders who are prepared to make positive contributions to the common good of society. Building upon its strong foundation in the liberal arts and sciences, the University provides an environment in which exceptional teaching fosters student learning, scholarship, and achievement. As the only four-year public institution in south central Virginia, Longwood University serves as a catalyst for regional prosperity and advancement.

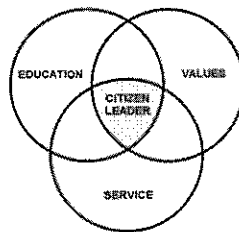
Approved by the Longwood Board of Visitors, July 1997.

The Vision

Longwood University will transform capable men and women into citizen leaders, fully engaged in the world around them. The University will be a first choice institution renowned for developing the power of citizen leadership in its students for the benefit of the greater community.

What is a Citizen Leader?

Citizen leaders are the bedrock of the democracy. They are the reasons communities thrive. They are the people who make the United States of America what it wants to be. They make our nation work. They care and they equip themselves with the tools to bring their caring to life in the world. A citizen leader effectively combines three components of a joy-filled life.



Education: The citizen leader is a lifelong learner and stays connected to what is new in the world. Faculty are encouraged and rewarded for contributing to scholarship as well as for their service as teachers.

Values: Citizen leaders know their values and live by them. Honesty, equality, civility, duty and an appreciation of the differences among peoples are fundamental values. To these, the citizen leader adds the personal values that define him or her.

Approved by the Board of Visitors

June 14, 2013

REVISED October 4, 2013

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Service: The capstone of every great civilization has always been a commitment to serve others. It is a common precept of the world's great religions; it is one of the finest expressions of our humanity. To the citizen leader, service is not just an extracurricular activity.

Approved by the Longwood Board of Visitors, December 8, 2007.

The Longwood University Board of Visitors currently does not have any plans for revising the University's Mission Statement.

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- B. Strategies –describe in more detail strategies proposed in the spreadsheet. Identify each strategy with the title used in the spreadsheet.

Improved Retention and Graduation Rates:

Longwood’s top strategic priority is a systematic, cutting-edge effort to raise the University’s retention and graduation rates to the very top of its peer group, and become a model in this area for the Commonwealth and beyond (\$1,000,000 – one-time initiative). The new president has recruited and restructured his staff in large part around pursuing this goal.

These efforts would build on recently developed efforts to help students graduate in a timely manner, notably the “Soar in Four” and “Fly in Five” (leading to a master’s in five years), which attempt to expedite progress toward credentials. Beyond these efforts, Longwood intends to undertake a campus-wide, data-driven to identify the obstacles that are tripping up Longwood students on their paths toward a degree. Are academic factors chiefly to blame? If so, what can be done to help – better advising, for instance, or more targeted remediation? Could financial aid be more effectively targeted to help those most in danger? At each step, Longwood intends to consult the growing body of research on retention, and what peer institutions have already learned as they tackle this problem, so as not to ‘reinvent the wheel’ or repeat mistakes others have learned. The potential of new technologies to help overcome obstacles to degree completion, and particular obstacles to students in STEM fields, will be considered at each step.

Once the most promising practices are identified, Longwood intends to make carefully targeted investments with the best prospects for return on investment, and sending more Longwood “citizen leaders” in whom the state has already invested into the college-educated workforce. Finally, Longwood will work to share the results and lessons of its efforts with other institutions across the Commonwealth.

Other key elements of this initiative will include:

Enhance Student Success Program (Continued from 2012-2018 Plan): Longwood will hire additional support staff to work with identified at-risk students to ensure they have the study skills, organization, tutoring and confidence to successfully complete their program and graduate. Positions will enhance advising, support new freshmen programming and partner with parents and family to support students’ transition and success in their academic and co-curricular activities, and provide data analysis for enrollment management.

Implement the Quality Enhancement Plan (QEP) (Continued from 2012-2018 Plan): The QEP, required by The Southern Association of Colleges and Schools (SACS) for reaffirmation, is a five-year plan to use undergraduate research opportunities to improve students’ critical thinking, information literacy and written and oral communication. The QEP will help students develop research skills in lower-level courses, support faculty-student collaboration, and provide opportunities for students to disseminate

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their research on and off campus. All Longwood students must successfully complete an internship or a faculty-directed research project related to their major in order to graduate.

New Degree Audit System: The University plans to implement new degree audit software to help guide students through the curriculum toward a degree, helping them monitor their credits and ensure they are on track toward a timely graduation.

Review and Revise General Education Requirements (Continued from 2012-2018 Plan): Over the next few years, Longwood will review and revise its General Education requirements to better align them with Longwood's mission and the needs of the Commonwealth, and where possible to facilitate faster degree completion consistent with maintaining high standards.

Increased degree production science, technology, engineering, and mathematics and other high-need areas such as the health care-related professions (STEM-H):

Longwood is committed to making a substantial contribution to the STEM-H goals of the Virginia Higher Education Opportunity Act of 2011. First, through new and expanded programs, Longwood will send more STEM-H graduates directly into the workforce. Also, building on its tradition of excellence in teacher education, Longwood will graduate more teachers prepared to bring innovation and excitement to the Commonwealth's K-12 classrooms, which will in turn produce more high school graduates interested in pursuing STEM-H fields in college. Some key initiatives in this area will include:

5-Year (4+1) Masters in Math/Science Secondary Teaching (Continued from 2012-2018 Plan): This program, scheduled to begin classes in Fall 2014, builds upon Longwood's strong teacher training in support of the Commonwealth's STEM goals, allows students to attend one additional year and obtain a master's degrees, thus saving them tuition, speeding their path into the teaching workforce, and increasing the Commonwealth's supply of well-trained STEM teachers who will be eligible themselves for higher salaries.

Explore the Development of New Health Profession Degrees: Building off Longwood's excellent Nursing program and our exceptional simulation laboratory, Longwood will explore the development of new programs in the health professions and possibly a school designation or college dedicated to the health sciences. Longwood will explore the development of new degree programs in Health Services Management and in Health Information Management, including working with community colleges in a 2+2 type program. The University will explore an undergraduate program in nutrition/dietetics, an area of strong workforce demand, including obesity treatment and prevention.

Develop an RN-to-BSN Program: Building on Longwood's BS in Nursing program, the University is working to develop an RN-to-BSN program to begin in 2015-16. Most nurses serving Southside Virginia are RNs, trained in community colleges. But many RNs are recognizing that upgrading their degrees to a BSN is becoming a prerequisite for broader job opportunities and higher salaries. A greater supply of

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BSN nurses also benefits the Commonwealth by creating a more flexible and better-trained nursing workforce. A growing body of evidence indicates BSN-prepared nurses improve healthcare outcomes.

Hire essential staff for expanding BS in Nursing Program: Enrollment in the BS in Nursing Program will grow by 10 students during the 2014-2020 biennium. Longwood will need to hire a nursing clinical placement assistant to work with stents on their clinical placements. Increased enrollment will require that a part-time nursing lab instructor position be converted to a full-time position.

Expand the Cyber-Security Initiative (Continued from 2012-2018 Plan): Working in close partnership with the Department of Defense (DoD), Longwood is committed to expanding the center of excellence it has established focused on the rapidly expanding and critical field of cyber-security. In 2012, the University reallocated funds to establish a secure cyber-security lab, and in September, 2013, the university was designated a National Center of Digital Forensics Academic Excellence by the Defense Cyber Crime Center. Longwood is the first institution of higher education in Virginia, and only the third in the nation, to receive the designation, which was created to respond to a projected deficit in the public- and private-sector cyber security workforce. The standards for designation were developed around skills identified by DoD as essential to preparing industry professionals. Partnering with industry groups and businesses, the Center for Cyber-Security will continue to focus on cutting-edge research as well as developing interest and guiding career planning in the field in high schools around the Commonwealth, through such endeavors as cyber-security clubs. The initiative is also working to expand internship opportunities with the Defense Intelligence Agency.

Implement the Center for Excellence in Environmental Education (CE³) Initiative (Continued from 2012-2018 Plan): With implementation scheduled to begin in 2015, the CE³ initiative will address environmental education across the Commonwealth – at Longwood University, in K-12 classrooms across Virginia, and at Hull Springs Farm, a 662-acre property located in Westmoreland County.

Expand Undergraduate Research in the Sciences: Longwood already requires all students to complete either an internship or a research project with a faculty member to graduate. This initiative, geared toward more undergraduate research in the sciences, would provide an additional faculty position and a full-time lab/outreach position.

Increased enrollment of Virginia students:

Longwood has traditionally educated Virginians with over 95 percent of its student body coming from the Commonwealth. Despite continued economic uncertainty and a declining number of high school graduates, Longwood hopes by 2020 to increase the size of its student body size not to exceed 6000 students – still predominantly Virginians – through improved retention, stronger recruiting and expanded academic programs, both on-campus and through distance education.

Additional Faculty Positions (Continued from 2012-2018 Plan): Longwood faculty currently carry an exceptionally heavy teaching load– four classes per semester on average. This unfunded initiative carries

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over from the 2012-2014 biennium and would provide additional faculty positions in heavily enrolled programs and to replace lecturers, some of whom do not have their terminal degrees, thus causing accreditation issues with SACS. Eight new faculty positions will provide the necessary increase in course offerings to meet the current and future student course demands needed to complete their degrees on schedule.

Admissions Counselors (Continued from 2012-2018 Plan): This unfunded initiative carries over from the 2012-2014 biennium. This initiative would provide one admissions counselor to visit community college across the Commonwealth to advise and facilitate the recruitment of transfer students, particularly first-generation college students who may need particular help with the transfer process. A second position would be an in-house undergraduate transfer and graduate recruiter.

Explore Offering Dual Enrollment Pre-Education Courses: The University will explore offering student spaces, free but subject to space availability, to the surrounding school divisions as dual enrollment courses in pre-education courses. The courses would be offered for high school level graduation credit, and college credit would be awarded to students who subsequently enrolled at Longwood.

Develop a cooperative agreement with Southside Virginia Community College (SVCC): The University will develop a cooperative agreement with SVCC to allow SVCC to hold classes in classroom and labs on the Longwood campus. This will allow more utilization of Longwood facilities year-round and it will provide SVCC with a more central location to reach students in the surrounding counties. It could also encourage students taking classes on the Longwood to consider continuing into a 4-year degree program.

Possible Additional New Programs to Serve the Commonwealth: In addition to programs mentioned above, Longwood hopes to serve additional Virginia students by expanding or starting the following programs:

- **Off-Site Programs and Clinical Placements:** Longwood will work to develop degree programs targeting underserved rural areas of Southside Virginia, including Emporia, South Boston and Martinsville and rural areas. The University would also explore expanding clinical placements for the Nursing program and for the Communication Sciences and Disorders program, which could encourage students in these regions to enroll in such programs, and graduates to continue to work in these regions after graduation.
- **Collaborative Early Childhood Inclusive Program:** The Early Childhood Inclusive program is a collaborative program across Elementary Education, Special Education and Communication Sciences and Disorders programs that would provide teacher licensure for PK-3. This is a program that the University has received requests to initiate.
- **MS degree in Social Work (MSW):** With its strong undergraduate course of study, Longwood could provide a valuable service to the region with a master's program. Currently, the Commonwealth's only four MSW programs are in Fairfax, Norfolk, Radford and Richmond, with none serving Southside. Many Longwood graduates currently move to

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other institutions to complete graduate work. The quality of Longwood's undergraduate program could provide a strong base for a seamless undergraduate/graduate program, possibly a five-year program.

- **Graphic Design Animation and Simulation:** Longwood will initiate a program in both current and emerging technology, focused on producing highly marketable graduates in areas such as digital design production, interactive and responsive web technologies and character animation.
- **Therapeutic Recreation:** Longwood hopes to add a new faculty position to this program, where enrollment is currently capped due to accreditation restrictions related to student/faculty ratios.

Additional Strategies Related to Goals of The Virginia Higher Education Opportunity Act of 2011 (Top Jobs)

In addition to the priorities above, these Longwood priorities also align with goals articulated in the Top Jobs Act.

Optimal year-round use of facilities and resources: Possible expansion of J-Term, running from mid-December to mid-January, which allows students to take up to two courses (six credits) and accelerate degree progress.

Development of instructional resource-sharing with other institutions in the Commonwealth: Longwood is home to one of the finest and most significant collections of Virginia vascular plant specimens in the mid-Atlantic region, the Harvill-Stevens Herbarium, which contains more than 75,000 specimens. Longwood will refocus the Herbarium to be a resource for Longwood students and will work collaboratively with public and private research institutions to make this extraordinary collection available for students across the Commonwealth.

Technology-enhanced instruction, including course redesign, online instruction, and resource sharing among institutions: Longwood will continue to broaden its online course offerings, which have grown from 228 courses enrolling 2,764 students in 2009 to 363 courses enrolling 3,933 students in 2012. Longwood intends to offer more fully online programs and – recognizing that online teaching must be highly interactive, individualized and responsive to students – build upon its expanding support and training for faculty.

Increased research, including regional and public-private collaboration: Longwood will work to expand the reach of its Office of Sponsored Programs and Research to seek support for faculty research programs. It will also explore working in collaboration with the Robert Russa Moton Museum in developing a Center for Civil Rights. The Center would provide opportunities for classes, internships, including collecting oral history, and other research, taking advantage of Longwood's location in a region rich and important with the history of the Civil Rights movement.

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- C. Financial Aid – Plans for providing financial aid to help mitigate the impact of tuition and fee increases on low-income and middle-income students and their families, including the projected mix of grants and loans.

Longwood University continues to keep tuition and fee increases low so that the University is affordable and accessible for students across the Commonwealth.

Seventy-two percent of Longwood students apply for aid (everyone that applies is offered at least student loans) and 52 percent of students receive aid to meet their financial “need” as determined by the FAFSA. In addition to funds received from the Commonwealth, the Longwood University Foundation provides over \$1.2 million in scholarships. The University plans to allocate approximately \$1.8 million in scholarship funding in the 2013-14 fiscal year. Students must meet FAFSA filing deadlines.

This past year, the University changed the way it awards financial aid dollars. The minimum state grant award was lowered from \$3,500 to \$3,000. Because Longwood awards state aid based on a percentage of remaining need, this has increased financial aid awards for our neediest student population while extending grant eligibility to middle-income students, to the extent that funding allows.

Students with an Estimated Family Contribution (EFC) of \$2,000 or lower generally fall into the state’s definition of low-income and those with an EFC between \$2,000 and \$20,000 fall into the middle income group. The revision in awarding financial aid dollars resulted in awarding grant funds to those with \$0 to \$13,000 EFC this year compared to \$0 to \$11,000 EFC last year, thus increasing the financial aid awards to more low-income and middle-income students.

- D. Evaluation of previous Six-Year Plan – Summarize progress made in strategies identified in 2011-12 Six Year Plan. Note how additional General Fund support savings and reallocations were used to further the strategies.

Through reallocations, the University:

- Hired additional faculty to increase enrollments in the following STEM-H programs: Nursing, Communication Sciences and Disorders, Athletic Training, Exercise Science.
- Initiated and will continue the SOLstice Summer Science Institute, which is a four-week summer institute for Longwood University middle school science teacher candidates and practicing middle school science teachers. Participants engage in scientific research through face-to-face and online programs. The program focuses on the Chesapeake Bay environment and utilizes Longwood’s Hull Springs Farm, a 662 acre site in Westmoreland County, which is situated between two tributaries to the Potomac River and just a short distance from the Chesapeake Bay.
- Implemented the Summer STEM Research Program.

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- Developed the CE³ Program. A feasibility study was conducted and is the basis for the programs that will be implemented in 2015.
- Developed and implemented the BS in Integrated Environmental Science Degree Program. During 2011-12, the University used internal resources to develop the curriculum for the BS in Integrated Environmental Science Degree. The University was granted final approval to offer the program by SCHEV at its May 2013 meeting.

The Commonwealth Center for Advanced Logistics Systems (formerly called the Virginia Logistics Research Center); a collaborative effort between Longwood University, Virginia State University, and the University of Virginia was formerly established using funds provided by the General Assembly. Last year, Virginia Commonwealth University became the fourth university member. The Commonwealth Center for Advanced Logistics Systems, (CCALS) tackles pressing logistics challenges confronting business and government operations. The University used General Fund appropriations for its initial membership fee and operations.

E. Capital Outlay – Note any capital outlay projects that might be proposed over the Six-Year Plan period that could have a significant impact on strategies, funding, or student charges. Do not provide a complete list of capital projects only those projects that would be a top priority and impact E&G and NGF costs.

1. Construct Student Success Center
O&M for 2015: \$307,000

The General Assembly has appropriated private funding and nongeneral funds (student fees) for the construction of a University Center. The cost of the Center is \$30 million, with \$15 million coming from private funds and \$15 million from bonds paid for through student fees. No exact date has been set for the start of the construction for this project since private funds are still needed; however, it is anticipated that those funds will be raised within the next year. In anticipation of this debt and to prevent a large spike in student fees in one year, the University started trending in the debt service in 2010 and should be completely phased in by 2014-2015.

The 2013 General Assembly appropriated construction funds, but no funding for operations; however, maintenance of this building must still be provided. This project will construct a 25,000 gross square foot building that will provide a central location for vital services focused on increasing student retention and graduation rates, and will thus support the key and overarching strategy – **Enhance Student Success Program**. The new Student Success Center will integrate six academic-related services into a coherent, synergetic, and operationally efficient location that provides easy access for students. The coordinated and co-located services will

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assist and enable students as they move through academic transition points by providing support during the key freshman year, enhancing academic and leadership skills, and providing academic and career advising services.

2. Construct New Academic Building

O&M for 2018: \$435,000

Planning authorization for this new academic facility was appropriated in the 2013 General Assembly. This project is a 42,000 gross square foot building that will provide 75 percent of the projected additional academic and student research space required for approximately 6,000 students in one cost-effective project. It will contain classrooms, collaborative learning space, student research and inquiry space, digital and distance learning facilities, faculty offices, and other academic support space. This facility will provide space for the initial phases of the following academic strategies: **Summer STEM Research Program, Development of New Health Profession Degrees, Develop an Interdisciplinary Minor in Neuroscience, Academic Program Coordinator, Expand Faculty Resources in Therapeutic Recreation, Expend Undergraduate Research in the Sciences, Implement the Qualify Enhancement Plan (QEP), Additional Faculty Positions, Expand the Office of Sponsored Programs and Research, and Develop a Collaborative Research Program with Other Institutions (Stevens Herbarium).**

3. Construct Admissions Office

O&M for 2018: \$244,000

Planning authorization for this new academic facility was appropriated in the 2013 General Assembly. The New Admissions Office project will support the academic strategy of **Increasing the Number of Admissions Counselors**. This project will construct a new 21,000 gross square foot building to house Longwood's Admissions Office. Longwood is committed to meeting the challenges of "Preparing for the Top Jobs of the 21st Century: The Virginia Higher Education Opportunity Act of 2011." A key element of Longwood's commitment is to increase recruitment of new and transfer students, especially those who might not be considering higher education. The new Admissions Office provides sufficient space, handicapped accessibility, convenience, and is a cost-effective facility. This prominent Admissions Office will signify that Longwood is a leader of higher education in Southside Virginia and throughout the Commonwealth.

4. Student Services Building (Lankford Renovation)

O&M for 2017: \$476,000

The Student Services Building will provide space to centralize service functions that are heavily utilized by students. The goal is to bring the following departments together into one facility: Cashiering, Financial Aid, Registrar, Housing, Lancer Card, and Parking Services. Each of these functions plays a critical role in allowing students to stay on track for graduation. Co-locating these services will undoubtedly make it easier for students to seek help and guidance on a

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variety of critical interconnected issues. Providing better and more direct ways of servicing the student body will support the Six Year Plan's goal of **Improving Retention and Graduation Rates**. This facility will be physically joined to the new Student Success Center in order to create synergy with the student support services planned for that facility, as well as leverage building physical efficiencies.

5. Construct New Physical Plant Building
O&M for 2019: \$741,000

This project will construct a 69,500 gross square foot replacement for the existing university facilities management and operations building. While not specifically tied to an individual or group of academic strategies, this project is an integral and significant part of **Longwood's mission of providing an environment that fosters learning, scholarship, and achievement**. The new facilities necessary to fulfill Longwood's Six-Year Plan requirements must be operated and maintained in superior condition for decades into the future. The existing facilities management and operations building is more than 50 years old, and vastly too small to house the personnel and equipment necessary to maintain Longwood's existing buildings, let alone those in the proposed capital projects. Operating and maintaining the new facilities will require additional personnel, and much more repair and storage space. Therefore, this project is essential for Longwood's Facilities Management Division to capably meet challenges of the anticipated new campus facilities.

6. Renovate South Tabb Hall
O&M for 2019: \$166,000

This project will renovate the 9,800 gross square foot South Tabb Hall to create a dynamic, efficient environment for the College of Graduate and Professional Studies and the Digital Education Collaborative (DEC). The DEC is a division of the College of Graduate and Professional Studies that is responsible for directing the policy and training framework to enhance online education by ensuring quality, academic rigor, and consistency across all on-line offerings. These efforts directly support the Six Year Plan initiatives related to technology-enhanced instruction, including course redesign and online instruction. South Tabb Hall must be renovated in order to provide the space and physical resources needed to adequately support the following strategic initiatives: **Increase Use of Distance Learning, Develop Fully On-Line Programs, and Enhance the Existing Speech Language Pathology Program**. Each of these initiatives will rely heavily on the staff and resources in the College of Graduate and Professional Studies. In order to service these needs, the College must physically expand to accommodate additional staff, lab and classroom space for instruction, as well as administrative support space. South Tabb Hall is currently unoccupied and available for renovation.

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7. Renovate Greenwood Library

This project will renovate the 71,000 gross square foot Greenwood Library. The Greenwood Library is the academic heart of Longwood. Students, faculty, and staff heavily utilize and rely on the physical and personnel resources found within this facility. It has become the gateway for academic information, collaboration, and networking. For these reasons the Library plays a critical role in the Six Year Plan's goal of **Improving Retention and Graduation Rates**. Improving access to information and providing more conducive study spaces will give students the appropriate environment to reach their potential and earn a degree from Longwood. The current Library was constructed in 1990 and was designed to meet the needs of a now-obsolete information philosophy based on books and paper records. Longwood plans to renovate the existing library in order to leverage technology to create a dynamic environment focused on collaborative learning and electronic resources.

8. Renovate Coyner Hall

The proposed project renovates the 18,000 gross square foot Coyner Hall into an academic facility for the College of Business and Economics (CBE) to support strategies identified in the Six Year Plan. Coyner Hall currently houses Information Technology Services (ITS); however, in the spring of 2014 ITS will relocate into the newly renovated French Hall. This move creates an opportunity to renovate Coyner Hall, which is already physically connected to Hiner Hall, the existing home of the College of Business and Economics. The renovation of Coyner Hall will support the university's Six Year Plan by providing spaces that are essential to successfully implementing several strategic initiatives that reside in the College of Business and Economics. The **Expansion of the Cyber-Security Initiative** will drive a need for an upgraded cyber-security lab which will meet the Department of Defense "secure" lab status. The **Dual Enrollment Course in Personal Finance** will create a need for sophisticated classroom space geared towards financial literacy and investments. The **Geo-Spatial Technology Initiative** will require dedicated space for the geographic information systems (GIS) computers, software, and tools necessary to support the program. Coyner Hall will also provide the necessary space to support the growing number of students, faculty, and administrative support needs of the College of Business and Economics.

9. Construct Multipurpose Center

This project will construct an 86,000 gross square foot multipurpose facility that will support academic programs and university events. It will specifically support the academic strategy to **Conduct an Assessment of Athletic Training and Exercise Science and Recreational Therapy Laboratories** by creating additional multipurpose space for the Department of Health, Athletic Training, Recreation, and Kinesiology (HARK). HARK Department requires additional classroom, laboratory, and exercise space for their rapidly growing academic programs. Their current space

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is woefully inadequate for academic purposes, and time restrictions on the use of this space severely limits the ability of the HARK Department to adequately meet its academic obligations. A significant portion of the facilities constructed by this project will provide flexible space for human factors laboratories, recreation therapy training, clinical practice space and simulators, teacher training space, and adaptable multipurpose facilities for future HARK programs.

10. Construct Sophomore Residence Hall

This project was approved by the Longwood Board of Visitors at its September 13, 2013 meeting. The Board determined that it wanted to house all students on campus for two years and an additional residence hall is needed to accomplish this since two residence halls (Tabb and French) had been taken off-line. The building will not be built until 2015-16 and costs are still being determined.

This project will construct a new campus residence hall containing approximately 200 beds on a conveniently located site in one of Longwood's residential quads. This site is centrally-located on Longwood's main campus, with close and convenient access to academic buildings, the campus dining hall, the library, recreation facilities, and student support offices.

Longwood University has a long history of providing students with housing in University-managed housing. This commitment extends the educational experience beyond the classroom by providing high-quality living space. Even with the advent of Longwood-managed apartment communities, students still demonstrate a strong interest in living in traditional on-campus residence halls because of their convenient central location and ability to foster a sense of camaraderie within the student community.

Expansion of our Compass community provides an opportunity for undeclared students to explore majors, meet and live with new students, participate in programs and outings, make connections with faculty and staff, and be part of a rigorous academic experience. Students selected for this living-learning community will have the unique opportunity to live in a residence hall with other students participating in this program. Students take several general education courses together including Longwood Seminar.

This project will support the following strategies in the *Longwood University 2014-2020 Six Year Plan*

1. Improved retention and graduation rates

- a. Enhance student success program – help **increase student retention and graduation rates** by providing more desirable on-campus housing for first- and second-year students. Will provide group integrity for key first two years of students' time at Longwood, allowing continual participation in student success program.

2. Increased enrollment of Virginia Students

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- a. Provide desirable on-campus housing as a attractive feature that will support **marketing and recruiting efforts**

This project will help meet an emergent demand for on-campus housing for transfer students. On-campus housing supports transfer students as they transition to the full-time four-year academic environment. Remaining on campus will enhance these students' availability for, and participation in, key elements of Longwood's student success program.

Tab 13

RETENTION AT LONGWOOD: AN OVERVIEW

Justin Pope
Chief of Staff

INTRODUCTION

During the 1980s and 1990s, the buzzword on campuses and among policymakers was “access” – opening the door of college to a broader and more diverse group of students. That effort has succeeded: college enrollment nationally is up roughly a third since the beginning of the century (and incoming freshmen are up comparably at Longwood), and is substantially more diverse. Now, however, the predominant challenge is shifting to retention -- the art, craft and (increasingly) science of making sure that students who come to college complete a degree.

The shift reflects a reckoning with tectonic trends across higher education, all of them visible at Longwood. Institutions will not be able to rely on rising state budgets or a growing pool of high school students. To improve “outputs” and their own financial health, they will have to keep more of the students they enroll. One need not believe that every student who enters college should graduate to acknowledge the waste in the system. Nationally, and at Longwood, roughly 60 percent of traditional incoming freshmen graduate within six years. There is intense focus on the waste – to taxpayers, institutions and above all students themselves – when each of those parties invests in a student’s education but the student fails to finish, and none of those “investors” reaps the rewards of the degree.

In the new landscape of higher education, successful, forward-thinking institutions will be those that make improved retention a high priority and think creatively about how to achieve it. The urgency is driven both by danger for those that fail to act and opportunity for those that do.

For decades, many institutions with poor retention rates have coasted on the ignorance or indifference of students and families when it came to factoring student success rates into their college decisions. Today, the data are much more readily available to consumers, and will almost certainly be increasingly factored into college choices. Families will want to know their children’s likelihood of graduating, and of graduating in four years. Meanwhile, state and federal policymakers are increasingly shaming institutions with poor graduation rates and even financially punishing them. President Obama’s latest round of higher education proposals aims to tie the massive system of federal financial aid, on which institutions like Longwood depend heavily, partly to a college’s student success measurements, including graduation rates. Some consider the idea counterproductive, but it is clear enough what the future holds: the powerful lever of federal financial aid will reward institutions that are successful with retention, at least compared to peers, and punish those that are not. Thus whatever trajectories institutions place

themselves on now – positive or negative – will likely be compounded and accelerated in the coming years.

On the positive side, the room for improvement offers a substantial opportunity for institutions like Longwood. Challenging-but-attainable increases in persistence could increase by several hundred or perhaps more the size of the student body (without lowering standards). The additional revenue from such students could exceed \$10 million or more annually, along with incalculable benefits in terms of community building, good will in the Commonwealth and in the lives and job-market outcomes for those “new” graduates.

It is also in many ways an exciting time for an institution like Longwood to undertake a laser-like focus on retention. Foundations are increasingly concentrating on retention, seeking partners who take it seriously. The power of “big data” is, for the first time, being brought to bear on retention, helping institutions identify which students are at risks and respond more quickly to them. It is a golden age of experimentation. Institutions are borrowing from the fields of behavioral psychology and economics to craft smaller interventions and creative “nudges” – policy experiments that, by subtly changing students’ trajectory, may in aggregate prove very effective. Showing itself to be a leader in this field would, among other benefits, burnish Longwood’s national profile as an institution “on offense,” creatively and aggressively tackling challenges and working to improve.

To be sure, there are no silver bullets, and no “nudge” can succeed in the absence of a culture that values student retention or an investment in the resources needed to support it. But experiments like default course selections for undecided students, financial aid emergency funds, and small shifts in the wording, timing and method of communications with students have all – particularly in combination with thoughtful use of data – shown promise and cost-effectiveness at other universities. While there are strong correlations between the academic profiles of incoming students and their success in graduating, they are far from universal. As the think tank The Education Trust has highlighted, many institutions have achieved substantially higher graduation rates than the academic profile of their incoming students would predict. They have proved SAT scores are not destiny. Most importantly, they have done so without compromising standards or academic rigor.

Several of these “thousand flowers blooming” experiments have begun in recent years at Longwood, where there is of course a strong foundation for a culture of student success. Still, considering the occasion of a new presidency and the fundamental importance of the issue, it is an appropriate time to lay the groundwork for a more systematic, data-driven look at ways to improve student retention (retention is closely related to the broader challenge of student success, which has been an official priority before, though retention is in some ways more focused).

This brief report will describe some of the essential components of the current national thinking on retention, then describe the current state of retention at Longwood and recent efforts

to improve. It may be a source of some frustration to the reader that there is no single, simple statistic that fully encapsulates the state of the issue here. Rather, several of the most relevant and reliable are discussed, which in combination paint a more comprehensive if not entirely straightforward picture.

There are many good things already underway on retention at Longwood, and any renewed focus on the topic should attempt to build on what works as well as fix what does not. As explained below, Longwood in fact performs well by some measures in comparison to peer institutions – an important context for evaluating any institution’s graduation rates. But it is also clear from the national research that a culture of “positive restlessness” – an unwillingness ever to be fully satisfied – is a common factor in virtually all successful institutions. Some of the “low-lying fruit” may already have been picked here in terms of improvements, and the work ahead will be difficult. Still, it is inarguably the case that institutions with graduation rates in the 70s or 80s, or at least moving in that direction, and retention rates in the high 80s or 90s, are very likely to be “healthy” institutions on a range of other measures as well. Achieving such numbers in retention would create a virtuous and self-reinforcing cascade effect across the university – from academics to student life, from admissions to alumni, and on Longwood’s finances. Those are worthy and reachable goals.

The report reflects interviews with several national experts and roughly a dozen faculty and administrators at Longwood who work closely on this issue. As such, it is by no means a comprehensive evaluation of the challenges here, nor (though some are mentioned) a catalogue or evaluation of the many efforts and initiatives already underway. Even less is it a set of prescriptions, which will require careful thought and analysis from throughout the university. Rather, it is an effort to set the table for the upcoming discussion on how to build on successes and systematically improve. On occasion, interviewees are quoted anonymously, reflecting an assurance given to them to encourage them to speak freely.

RETENTION - A SHORT PRIMER

The body of literature studying the issue of retention in higher education is a mile thick, and, to a large degree, poorly designed, unreadable, uselessly vague or platitudinous. However, there are some major themes that emerge and offer an important foundation for exploring retention at Longwood.

Student Engagement

While the reasons students drop out of college are endlessly complex, the overarching theory that has emerged around retention is based in “student engagement.” The connection dates to the 1980s and a prominent researcher named Vincent Tinto, who likened the process of dropping out of college to suicidality – in both cases, the victim becomes disconnected from a

social system and its values, and fails to develop a set of supportive relationships. The theory has evolved but held up well, and is increasingly supported by data from studies like the National Survey of Student Engagement.

To be sure, there are certainly “input” factors in student success, and not surprisingly, academic predictors like higher high school school grades and test scores are positively correlated with persistence, while factors such as coming from a low-income family make persistence less likely. The initial research economics professor David Lehr is undertaking on Longwood students, flagging risk factors for retention and graduation, offers potential for Longwood to better understand those patterns and identify students most in need of extra help. But what seems critical more generally is whether a student plugs into a network of relationships with friends and mentors (coaches, faculty and/or staff) that – and this is essential – bridges their academic, residential and social experiences.

This is particularly important during the first year – indeed weeks – of college, when students build relationships that cause them to feel they “fit” within an institution and develop a loyalty toward it that can carry them over obstacles and setbacks. It’s no surprise that institutions are increasingly recognizing the connections between, for instance, a strong residential college experience and student retention, and thus encouraging students to live on campus. In many respects, of course, Longwood has a strong structure and foundation for this kind of experience, though as we shall see below, it is not yet where it needs to be.

Finance

More recently, as the cost of college has continued to rise and family income has stagnated, the research on retention has understandably also shifted to economic factors. Institutions are using creative thinking and the insight of “big data” to stretch their dollars further. As just one example, Georgia State University, where one-third of students come from families earning less than \$30,000, came to see through data analysis that many of its students were dropping out due to an inability to bridge relatively small short-term financial setbacks. Allocating financial aid dollars to small emergency grants of less than \$1,000 has helped the university substantially improve retention. At Longwood, there have been efforts to make a full range of student services more responsive. But Longwood has not yet been able to provide its constituents any kind of timely and thorough data picture of the connections between retention and financial aid. David Lehr’s work, and that of a new data analyst in the financial aid office, offer the potential for a fuller understanding of the connections between socio-economic status, structure of financial aid awards, and risk of not graduating. But continuing improvements in our data methodologies are important.

Resilience

Most of us have an instinctive sense that what distinguishes students who push through and finish college often isn't academic preparation, but something intangible that enables them to rebound from setbacks. Certainly teachers see this first-hand. "It's this idea of academic grit," said one longtime arts and sciences professor. "As I look at the students who cannot make it through here, they have not found in themselves or found externally to themselves someone who would help them develop this idea that 'no matter what it takes, I'm going to be successful.'"

This is the "art" of retention and its defiance of easy measurement is always a challenge for those studying and trying to improve retention. Teaching "grit" is by no means easy, and may not lend itself to systematic interventions. However, researchers are increasingly examining the questions of "grit" and resilience through the lens of science and big data, learning to target and time interventions to students most likely to be set off course by setbacks. David Lehr's research is a good example; he reports his early findings suggest focusing on issues like time management and priority-setting may provide a better payoff than, say, structural academic changes.

RETENTION AT LONGWOOD

Current Overview

How is Longwood currently doing on retention? Because of the data limitations, it is unfortunately difficult to say with great precision or credibility what Longwood's long-term history on many of these measurements has been. Understanding historical patterns is further complicated by inadequate institutional research capacity for much of the university's history that has begun to be rectified only in the last few years. For recent years the data collection is stronger and more credible, though it requires some explanation.

Rather than bog down in numbers here, the appendices to this report provide and explain some of the most relevant current metrics on the issue at Longwood. The essential elements are as follows. The main graduation rate the federal government requires Longwood to report measures only first-time, full-time students who graduate from Longwood within six years (it excludes non-traditional students and transfers). For the most recent cohort, as noted above, that figure at Longwood is about 60.8 percent. That rate has been ticking upward at roughly one percentage point per year in recent years – no small achievement during a time of economic stress – though it remains below its 2008 peak.

The percentage who graduate within four years is 44.8 percent, and that number has grown in recent years despite (or perhaps because of) the economic downturn. It is also essential to examine the figures broken down by race and gender, as there are wide disparities. (See Appendix 1).

A “Student Success Index” developed by SCHEV (in response to criticisms of the federal graduation rate measurement) gives a broader definition of success, counting non-traditional transfer students. It also counts students who are still persisting in college, and gives an institution “credit” if they have transferred and are in another Virginia institution (See Appendix 2). In other words, it offers a more complete picture of students who have at least not dropped out of college, and naturally a higher number than a single institution’s pure graduation rate. Another key statistic is first-to-second year retention (Appendix 3). Finally, Longwood’s figures should be viewed at least partly in comparison to other institutions in Virginia and peer institutions nationally with similar missions and academic profiles. (Appendices 4 and 5).

The graduation rate took noticeable dives for cohorts arriving in the mid-1990s and again in 2003, and have increased gradually since then. Retention figures have been fairly positive, though the most recent 6-year SSI rates have also declined slightly. It is difficult to draw any conclusions more sweeping than to say the extended economic downturn has made it harder for students to get through in six years. Tim Pierson noted that clearly the period after the 2001 fire and substantial work on the central campus around that time, coupled with other challenges to the university, no doubt affected the sense of community and learning atmosphere and likely had some negative effect on student retention. Others cited the general education curriculum changes that took place around the turn of the century as an important factor.

Finally, a remaining but critical aspect of the retention aspect of Longwood is that is not entirely an issue of student success. We are only just now beginning to collect more than isolated snapshots of the data, but we know for instance from the cohort that entered in the fall of 2007, that more than half of the 205 freshmen who did not return as sophomores were in good academic standing (Appendix 9). A 2005 Noel-Levitz telephone survey found “the most critical roots of departure ... were more likely to be related to social adjustment than academic adjustment.” Vikki Levine is beginning to systematically gather survey data on students who withdraw. While her findings do not yet include end-of-semester numbers (which will presumably show an increase in academic withdrawals) the figures she has collected so far point to a large proportion who are leaving for reasons other than academic troubles (Appendix 8).

The challenge of persuading adequate or top students to stay is different from the challenge of boosting the academic success of those at the bottom. Any expanded focus or allocation of resources toward retaining top students would have to be considered through the lens of Longwood’s mission, weighing the benefits (for example, improvements to campus academic and extra-curricular life of retaining more high-performing students) against the costs (spending resources on students who, if they transfer, are likely to be successful regardless).

Longwood and Its Peers

By some measures, in comparison with peer institutions, Longwood does relatively well. George Kuh, one of the leading researchers of student engagement, has featured Longwood in a

number of articles and studies on high-performing institutions. Longwood's student success metrics are slightly above the average for students at Virginia public institutions. A tool developed by The Education Trust generates peer groups for institutions based on their size, sector and academic and demographic profiles, then compares their graduation rates. The list it generates to include Longwood and (according to the algorithm) the 14 other institutions nationally that most resemble it, Longwood has the fourth-highest graduation rate in that group (Appendix 5). However, virtually every other institution had a higher graduation rate in 2011 than in 2006, while Longwood's was lower.

An area of concern, given its centrality to retention, is student engagement. Longwood is a regular participant in the National Survey on Student Engagement, which attempts to measure just how engaged and connected students are – factors, as we've seen above, that are closely tied to retention. Are students working hard academically? Are they learning collaboratively? Are they developing personal relationships with faculty and other mentors? Do they feel supported? The results of this survey (for samples, see Appendix 7) have been summarized and presented by Onie McKenzie, the Assistant Vice President for Student Affairs, to the Student Affairs staff, the academic deans, and a small group of Education faculty, and also shared on the Student Affairs website (<http://www.longwood.edu/studentaffairs/40331.htm>). But the degree to which they have been used to inform decisions more broadly has not been documented.

In short, the student engagement survey has shown that, compared with their counterparts at other institutions, students who persist to their senior year at Longwood enjoy a fairly healthy dose of these “connective” experiences. But in several important categories, Longwood freshmen still fall short of engagement levels to which an institution of its size, mission and teaching tradition should aspire (though in a notable exception, Longwood freshmen report feeling well-supported compared to peers elsewhere, while seniors are less satisfied on that front – perhaps out of frustration with the “Longwood runaround.”)

“By the time we get them to the senior level, we've got it,” Onie McKenzie said. But “what we would want to have happen to our first-year students, we are not there.” The encouraging news is that the importance of student engagement is becoming “baked in” to the DNA of the Student Affairs office, with several units consolidated under a unit reporting to a new associate dean for student engagement. The first-year experience initiative and, on the academic side, the QEP's focus on undergraduate research, are both geared to address precisely these issues. Future NSSE data should be closely monitored to see if these practices are working. McKenzie also suggested that an analysis of the typical freshman classroom experience and the general education curriculum review would help shed light on the NSSE findings.

Recent Retention Improvement Efforts at Longwood

Retention is not a new topic at Longwood. A considerable variety of efforts to improve retention are already underway, and any revived broader effort should of course begin with an effort to identify and build on what is already working. In 2005, President Cormier focused the administration's attention on the retention issue. Ken Perkins was brought into the president's office in a position specifically focused on student success. Later, when his responsibilities expanded, a new position was created beneath him to continue the focus on student success and enrollment management. Jennifer Green has held that position since 2012.

The 2005 effort also included engaging consultants who met with faculty and staff and surveyed students, including some who had left. Those discussions identified a few major areas of weakness: advising for undecided majors, the experience of first-year students, and an inadequate system of customer service. A number of initiatives eventually emerged from these discussions. Two key administrative teams (with some usefully overlapping membership) were started – a “CARE” team which attempts to act as a kind of listening post and pick up warning signs about individual students from across the institution, and intervene to assist. The enrollment management committee has tried to address retention issues at more of a policy level, identifying obstacles and working on the “Longwood runaround.” The office of the first-year experience targeted programming to first-years. On the academic side, advising was restructured to integrate academic and career advising, particularly for undecided students (faculty continue to handle academic advising for students already on an academic track, with -- it should be noted -- hugely varying advising loads across departments). The Parents Council, begun in 2009 to connect with the parents of incoming students, was also intended as a retention initiative.

Those interviewed offered a broad array of opinions about the relative merits of these changes and the effectiveness of these efforts. Some suggested small changes around the edges, others fundamental and more ambitious reforms. Regardless, there was a general sense that the previous effort, while well-intentioned and serious, did not produce a sufficiently textured understanding of why students were dropping out. Going forward, it is imperative both to improve that understanding, and make use of it in policy and practice.

A thorough evaluation of the efforts that have emerged in recent years is beyond the scope of this report. However, some conclusions and points for further consideration have emerged.

CONCLUSIONS

Actionable Intelligence

Nobody disputed there is a strong professional commitment to student success at Longwood. But there was agreement in many quarters that that culture has not been adequately supported by “actionable intelligence” – that is timely access to useful information. “I never did

get what I thought was adequate data internally that could lead me to good decision-making,” said one senior administrator who was at the front lines of those efforts. The various systems where early warnings might appear – residential life, the registrar’s office, institutional research, the faculty, financial aid and others – have generally communicated in a person-to-person manner. Such communication is essential, but fallible and insufficient on its own. Nor have the findings on Longwood students’ experiences, through the National Survey of Student Engagement as well as other surveys, been effectively used by those across the Longwood community. Only recently has Longwood seen the beginning of efforts to systematically identify bottlenecks in the curriculum – “killer course” or curriculum requirements that may warrant particular attention.

Several people also emphasized important improvements just over the last year or so, and detailed promising new practices and experiments across campus. Vikki Levine, the registrar, along with various partners and champions, has been reaching out to students who are unregistered after the official registration and advisement period. They are working together to determine if holds on student accounts (financial, immunization, etc.) or other barriers are preventing registration and to see if they can help. The team in her office is trying to meet with students when they are considering withdrawing rather than after they’ve decided to do so. Overall, “we are trying to get closer to flagging the at-risk population,” she said.

Admissions Dean Sallie McMullin expressed similar sentiments about encouraging developments in the last year. Still, she has historically lacked actionable information on how applicants are likely to fare at Longwood – the kind of data to assist in a borderline admissions decision. Ironically, while she has ample information on students’ records before they arrived on campus, she has not had a systematic way to track what happens to them once they arrive. As one example, with another housing crunch likely to happen next fall, she would like to know how students who had to live in transitional housing in past years fared. Was there an impact on retention?

A few weeks ago, several Longwood administrators viewed a Webcast of a presentation organized by Oracle and Valdosta State University in Georgia about their efforts to apply “big data” to retention. Oracle obviously was interested in selling a particular database software product that may or may not be useful to Longwood, and was showing off a “proof of concept” client. But the capacity to provide “actionable intelligence” was remarkable. Valdosta State can search, for instance, for words and, more usefully, patterns, within aggregate course evaluation reports. Perhaps more exciting is its power to integrate data seamlessly from across the campus – academics, financial aid, residence life, even dining services. With literally a single click, Valdosta State showed how it can generate real-time retention rates for students broken down by any number of variables – information that is still painstaking to gather at Longwood.

One Valdosta State faculty member was curious whether students who eat breakfast are more likely to persist. With a couple of key strokes, student ID card data identifying which

students had swiped into the dining hall between 6 and 9 a.m. most weekdays was run against persistence data. The answer: roughly 88 percent of Valdosta State students who are regular breakfast eaters graduate, or roughly double the overall student body rate.

Any statistician will point out what that doesn't tell you -- whether good students are just more likely to eat breakfast, or whether breakfast makes a student more likely to graduate. The answer is likely both. But in the battle for marginal victories, it suggests perhaps an effort to encourage students to eat breakfast might be worth trying (as it turns out, Longwood has indeed flagged a couple of student to check on, based in changing patterns of meal-plan usage, noticed by an employee. The idea, incidentally, also brings to mind another potentially promising area: an emerging body of research is pointing to helping students sleep more as a potential bonanza for student success rates).

Technology: Ambition and Humility

Any efforts to build a culture of effective data use and sharing should reckon honestly with the limits and even dangers of overreliance on technology. Among the small group interviewed for this report, some had great confidence in technology to play a key role in helping improve retention, while others worried undue faith in it might do more harm than good. Clearly the trick is to deploy data thoughtfully to assist and help target person-to-person work rather than entertain any idea it can replace it.

Anyone familiar with the multi-billion dollar education software industry is aware of the profusion of snake-oil like products that have proliferated from it. There is also a great deal of hype surrounding big data and its potential. Purdue University has gained a reputation as one of the leaders in using big data to construct an early warning system to flag at risk students. Yet recently Inside Higher Ed reported that outside researchers had looked closely at Purdue's results and eviscerated the university's conclusions that the system was boosting retention. It was a cautionary reminder: there are no silver bullets. Retention work is a hard slog, with data analysis only one important part.

It's also important to approach with humility efforts to make "systemic" interventions. Longwood is a complicated and diffuse system spread across three schools, an honors college and 18 departments. "We are a very small school with 4100 students and lots of layers of hierarchy and it's very hard to provide anything systematically," said one administrator. The faculty plays a fundamentally different role in a university than do the employees of other types of organizations. Clearly, further efforts at improving retention will require careful evaluation of when systemic efforts are warranted and when they risk more harm than good.

Student Engagement as an Overarching Value

The concerted focus of Student Affairs, and of academic initiatives like the QEP, on issues of student engagement is an extremely positive development. Yet it will be important for

Longwood to put questions of student engagement at the center of all policy decisions. For instance, by the account of a veteran faculty member in one of the relevant fields, the policy of charging by the credit hour means students now essentially have to pay to participate in theater, choir or other musical activities. The change has effectively brought into the curriculum a traditionally extracurricular realm. As a result, fewer students are participating, particularly those just interested in trying something new, meeting a new group of people, or exercising different muscles of their brain. This faculty member feels this change has been particularly detrimental at a place like Longwood, where many students “come to college from a position of a school community, not academic strength.” In other words, student engagement may be even more important to eventual academic success here than elsewhere.

Also related to the issue of per-credit pricing, here’s another noteworthy statistic: SCHEV provides Student Success Index scores for institutions broken by the number of credits students earn their first year. At Longwood, the latest figures show a success rate of just 33 percent within six years for those earning fewer than 12 credits; a 65 percent rate for those earning 12 to 23, and a 90 percent success rate for those earning 24 or more. It is hardly surprising that students who accumulate more first-year credits are more likely to succeed, but the scale of their advantage raises the question of whether pricing should be change to incentivize students to take a fuller load. To be sure, such a shift might initially be unpopular. But nationally, an impressive 75 percent of students who take a full credit load graduate within six years. Among part-time students, even after eight years, only one-quarter have graduated. Simply being aware of those statistics might persuade more students to take a fuller load.

The relative costs and benefits of continued per-credit pricing require careful consideration, but if retention is a top priority at the university, it should ensure that analysis pays careful attention to the impact on student engagement. The group Complete College America is pushing institutions to use nudges and pricing incentives to encourage students to take a full course load if at all possible, and recently persuaded the Oklahoma public university system to make changes in that regard, among others.

General Education

Multiple interviewees drew the connection between the upcoming general education review and retention. There was a belief on campus before the 2005 initiative that the general education reform a few years previously negatively affected retention. Clearly, retention is not a discreet topic of attention, but an issue that must be considered carefully in almost every initiative that takes place at Longwood, general education reform included.

Faculty Involvement

Faculty are in many ways the tip of the spear of retention – the most important part of the early warning system and often the key point of intervention. Faculty members’ willingness and ability (in light of their multiple other responsibilities) to make student retention a key personal

priority understandably varies. The respective roles of faculty and academic support staff should be considered to ensure effective coordination and use of time. Faculty could benefit from more effective and timely student data, and could likely also have to play a role in gathering and providing such information.

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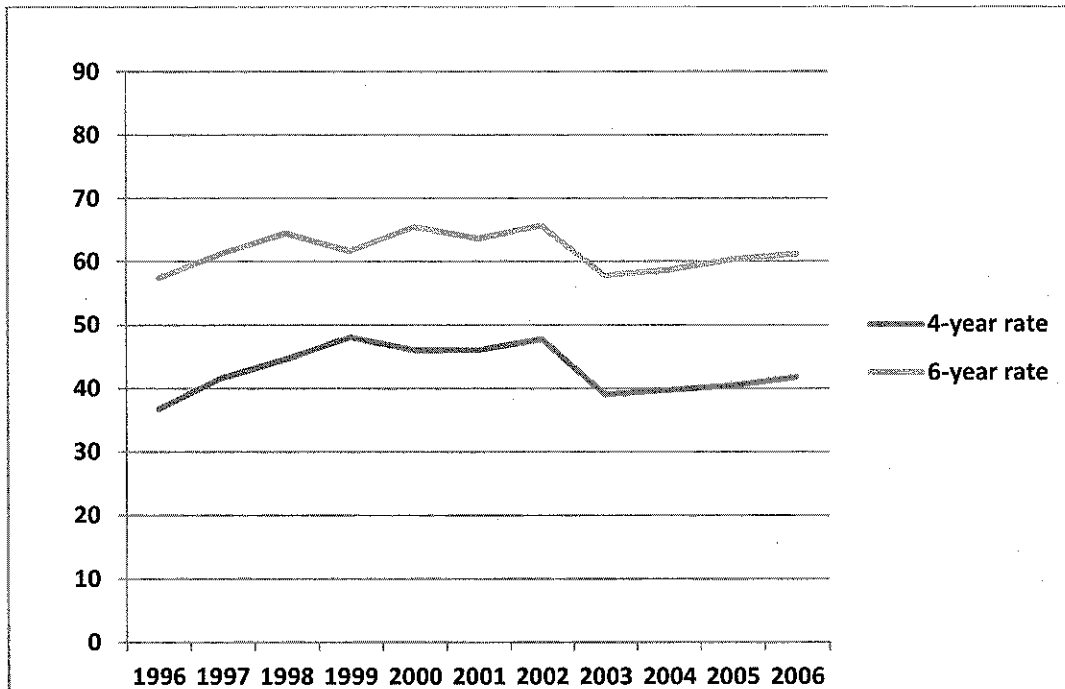
APPENDIX 1 – GRADUATION RATES

This chart shows the 4- and 6-year graduation rates for entering cohorts in recent years, overall and then broken down by gender and race. It calculates only first-time, full-time students who entered during the cohort year and graduated from Longwood within the given time frame.

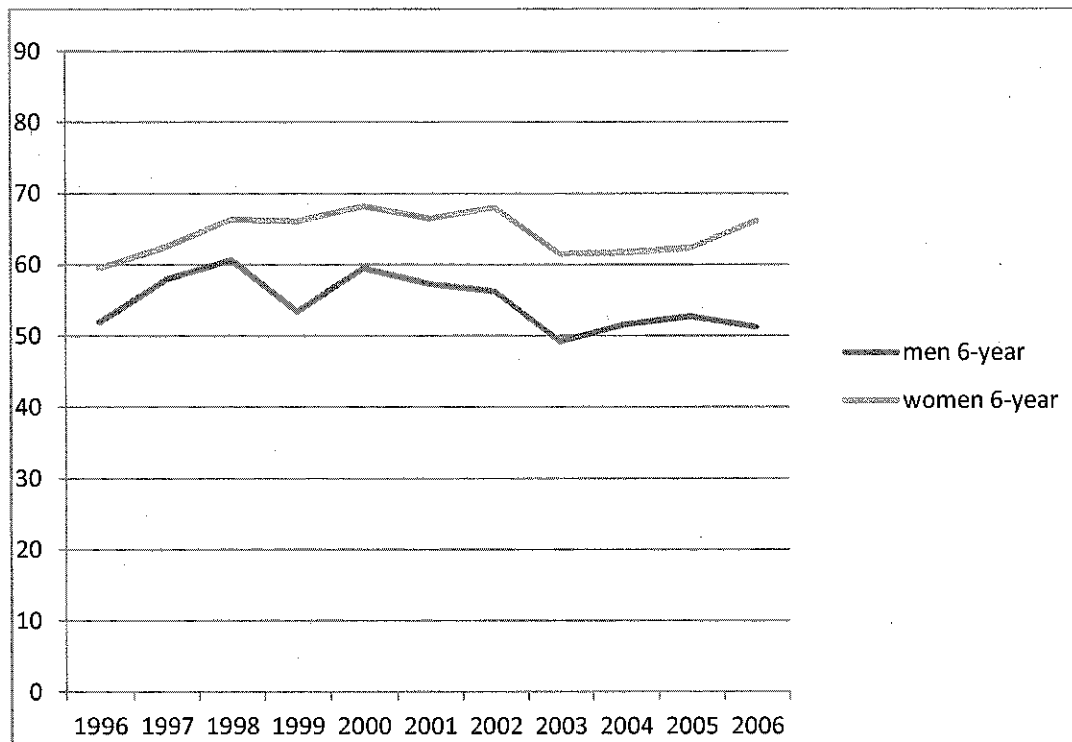
Graduation Rate Year	Cohort Year	FTIC Cohort	4yr Grad Rate	Male /Female	Gender sub-cohort *	Years to Graduation	Total Grads	Rate	Black, non-Hispanic GR Rate	White, non-Hispanic GR Rate
			5yr Grad Rate							
			6yr Grad Rate							
2012	2006	989	41.7%	Men	361	4yr	111	30.7%	30.8%	31.7%
			58.9%			5yr	171	47.4%	30.8%	47.6%
						6yr	185	51.2%	38.5%	51.7%
			61.2%	Women	628	4yr	300	47.8%	39.0%	48.6%
						5yr	409	65.1%	63.4%	65.8%
						6yr	418	66.6%	63.4%	67.5%
2011	2005	956	40.4%	Men	311	4yr	88	28.3%	20.0%	29.4%
			58.2%			5yr	153	49.2%	45.0%	45.4%
						6yr	164	52.7%	60.0%	47.8%
			60.3%	Women	645	4yr	291	45.1%	32.0%	47.2%
						5yr	393	60.9%	46.0%	64.1%
						6yr	402	62.3%	50.0%	65.4%
2010	2004	980	39.7%	Men	345	4yr	111	32.2%	34.4%	32.0%
			56.9%			5yr	168	48.7%	43.8%	49.8%
						6yr	178	51.6%	46.9%	52.9%
			58.6%	Women	635	4yr	275	43.3%	46.2%	44.1%
						5yr	385	60.6%	69.2%	62.0%
						6yr	392	61.7%	73.1%	63.0%
2009	2003	880	39.0%	Men	301	4yr	91	30.2%	11.1%	30.9%
			56.1%			5yr	142	47.2%	27.8%	49.4%
						6yr	148	49.2%	27.8%	51.7%
			57.8%	Women	579	4yr	249	43.0%	43.1%	43.8%
						5yr	347	59.9%	54.9%	61.3%
						6yr	356	61.5%	54.9%	62.7%
2008	2002	879	47.7%	Men	276	4yr	101	36.6%	25.0%	39.1%
			63.6%			5yr	146	52.9%	31.3%	56.3%
						6yr	155	56.2%	31.3%	60.1%
			65.7%	Women	603	4yr	309	51.2%	38.7%	53.0%
						5yr	401	66.5%	58.1%	67.9%
							6yr			

						6yr	410	68.0%		64.5%	69.2%
2007	2001	893	46.0%	Men	281	4yr	103	36.7%		42.9%	36.4%
			61.7%			5yr	151	53.7%		42.9%	54.3%
						6yr	161	57.3%		42.9%	57.9%
			63.7%	Women	612	4yr	307	50.2%		52.6%	50.9%
						5yr	399	65.2%		66.7%	65.6%
						6yr	407	66.5%		70.2%	66.7%
2006	2000	895	46.0%	Men	284	4yr	105	37.0%		37.5%	36.5%
			63.6%			5yr	162	57.0%		43.8%	57.6%
						6yr	169	59.5%		43.8%	60.4%
			65.5%	Women	611	4yr	307	50.2%		54.1%	42.4%
						5yr	407	66.6%		65.6%	57.1%
						6yr	417	68.2%		70.5%	58.1%
2005	1999	815	48.0%	Men	281	4yr	101	35.9%		25.0%	37.6%
			61.6%			5yr	149	53.0%		53.1%	52.3%
						6yr	150	53.4%		53.1%	52.7%
			61.7%	Women	534	4yr	290	54.3%		48.7%	54.8%
						5yr	353	66.1%		61.5%	66.9%
						6yr	353	66.1%		61.5%	66.9%
2004	1998	814	44.6%	Men	274	4yr	91	33.2%		13.6%	35.0%
			62.6%			5yr	158	57.7%		31.8%	61.2%
						6yr	166	60.6%		31.8%	64.6%
			64.5%	Women	540	4yr	271	50.2%		43.2%	51.5%
						5yr	350	64.8%		59.5%	65.7%
						6yr	358	66.3%		62.2%	67.2%
2003	1997	730	41.6%	Men	216	4yr	67	31.0%		23.5%	32.3%
			58.8%			5yr	119	55.1%		58.8%	56.1%
						6yr	125	57.9%		58.8%	59.3%
			61.3%	Women	514	4yr	236	45.9%		43.8%	46.7%
						5yr	309	60.1%		56.3%	60.9%
						6yr	321	62.5%		58.3%	63.4%
2002	1996	661	36.7%	Men	212	4yr	52	24.5%		15.8%	27.1%
			54.9%			5yr	99	46.7%		31.6%	50.3%
						6yr	110	51.9%		42.1%	55.2%
			57.4%	Women	449	4yr	189	42.1%		32.1%	45.0%
						5yr	262	58.4%		54.7%	59.8%
						6yr	267	59.5%		58.5%	60.6%

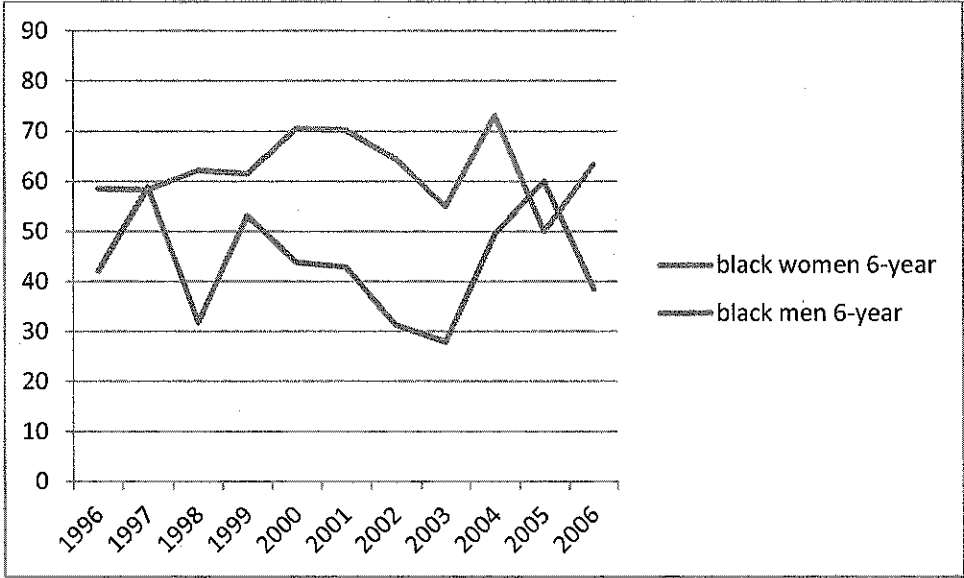
The graph shows change over time in the overall 6-year graduation rate:



6-year graduation rate men versus women:



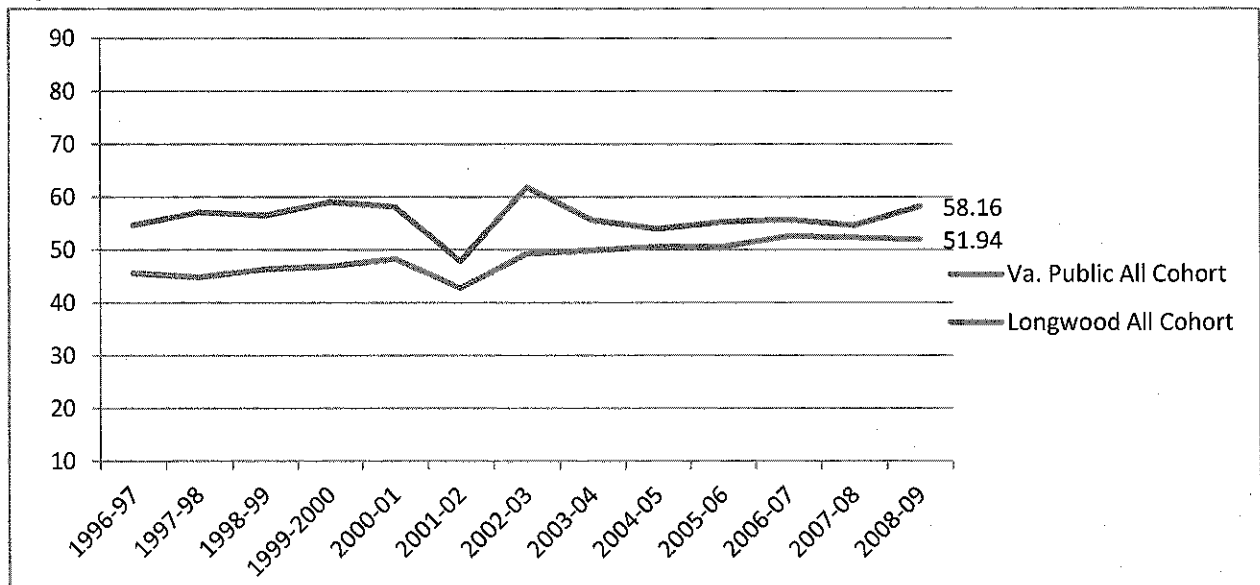
6-year graduation rates for black men and black women.



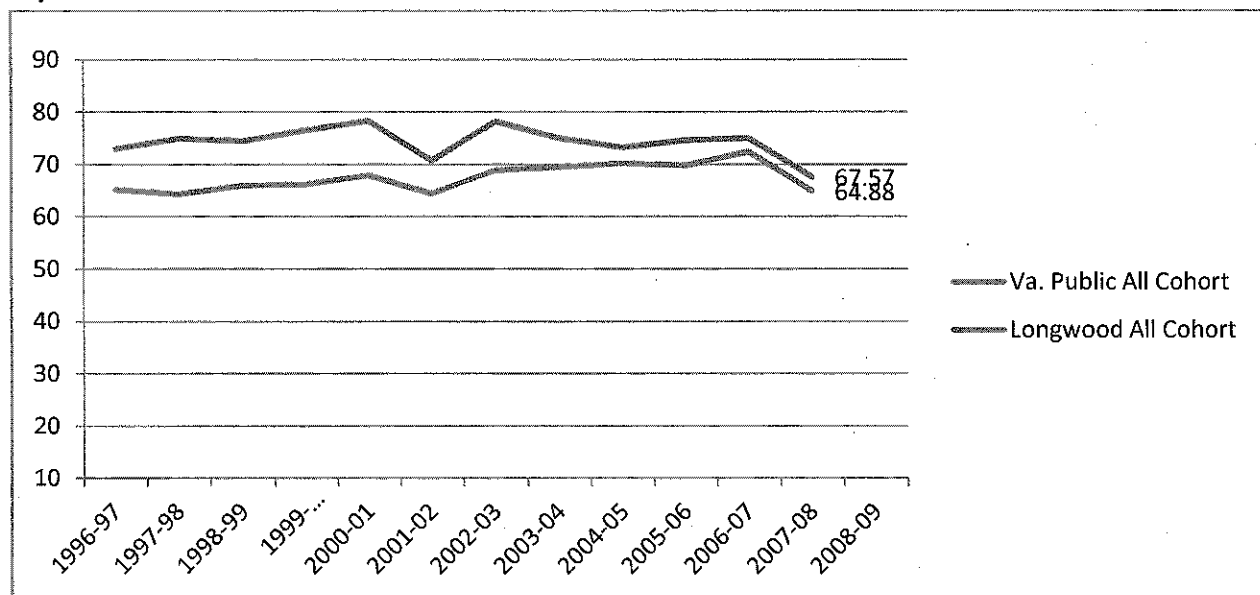
APPENDIX 2 – STUDENT SUCCESS INDEX

Because of the shortcomings of the official graduation rate measurement, which measures only first-time full-time students who graduate from the institution where they started, SCHEV has developed a “Student Success Index” that captures a broader range of students and outcomes. It includes transfer and part-time students, and also captures students who are persisting within four or six years, or have transferred elsewhere in the state system. In other words, it essentially measures all students who have not dropped out of college. Note it is a composite score, not a percentage (somewhat akin to the S&P 500 index), but is measured on a 100-point scale. This chart compares the SSI for Longwood students versus the cohort of all students at 4-year Virginia public universities.

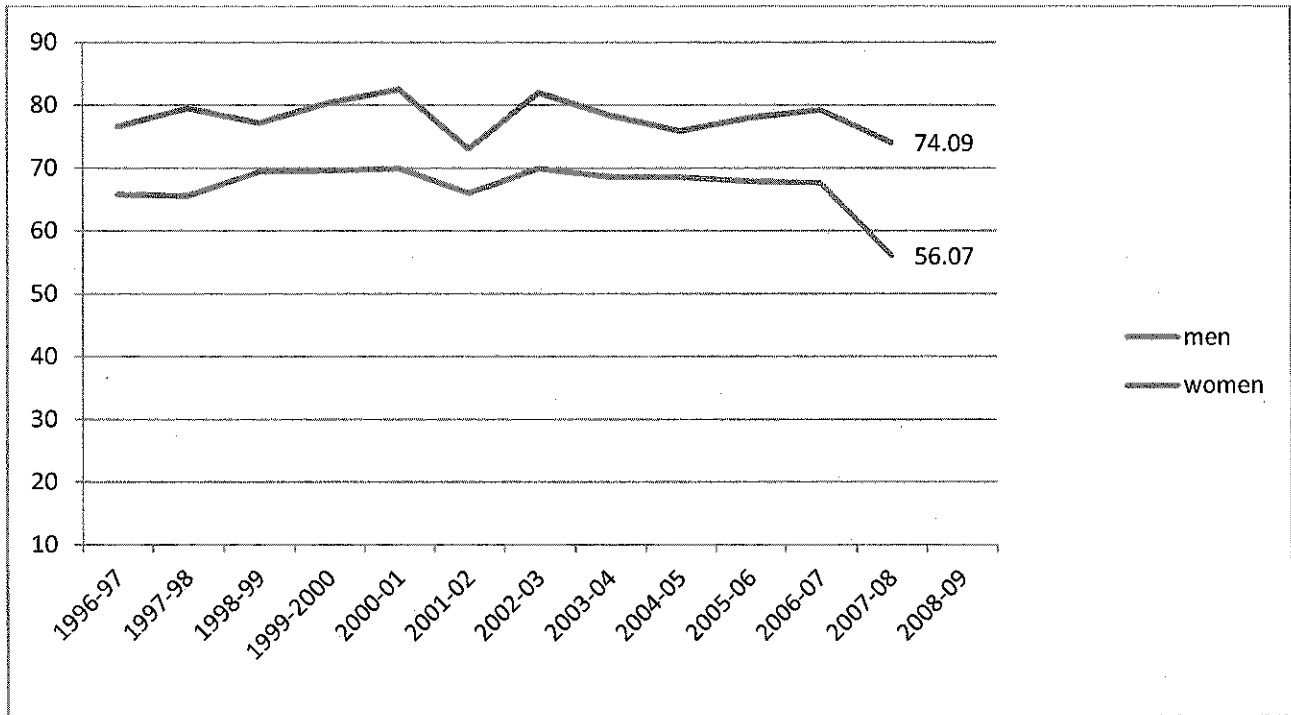
4-year SSI



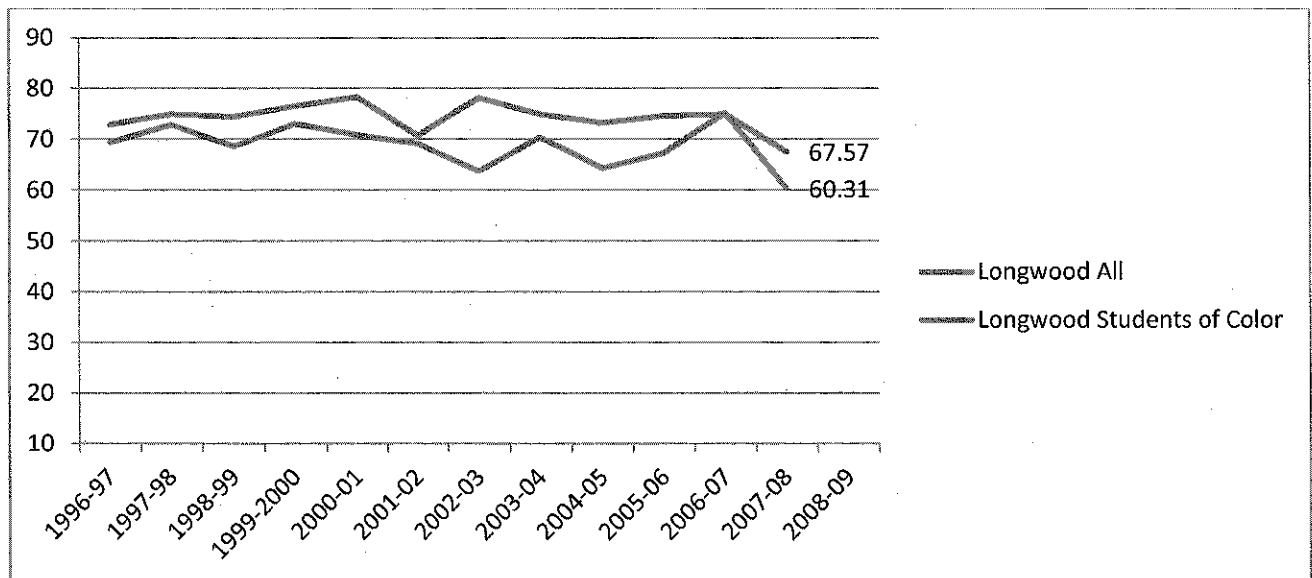
6-year SSI



Longwood 6-year SSI By Gender

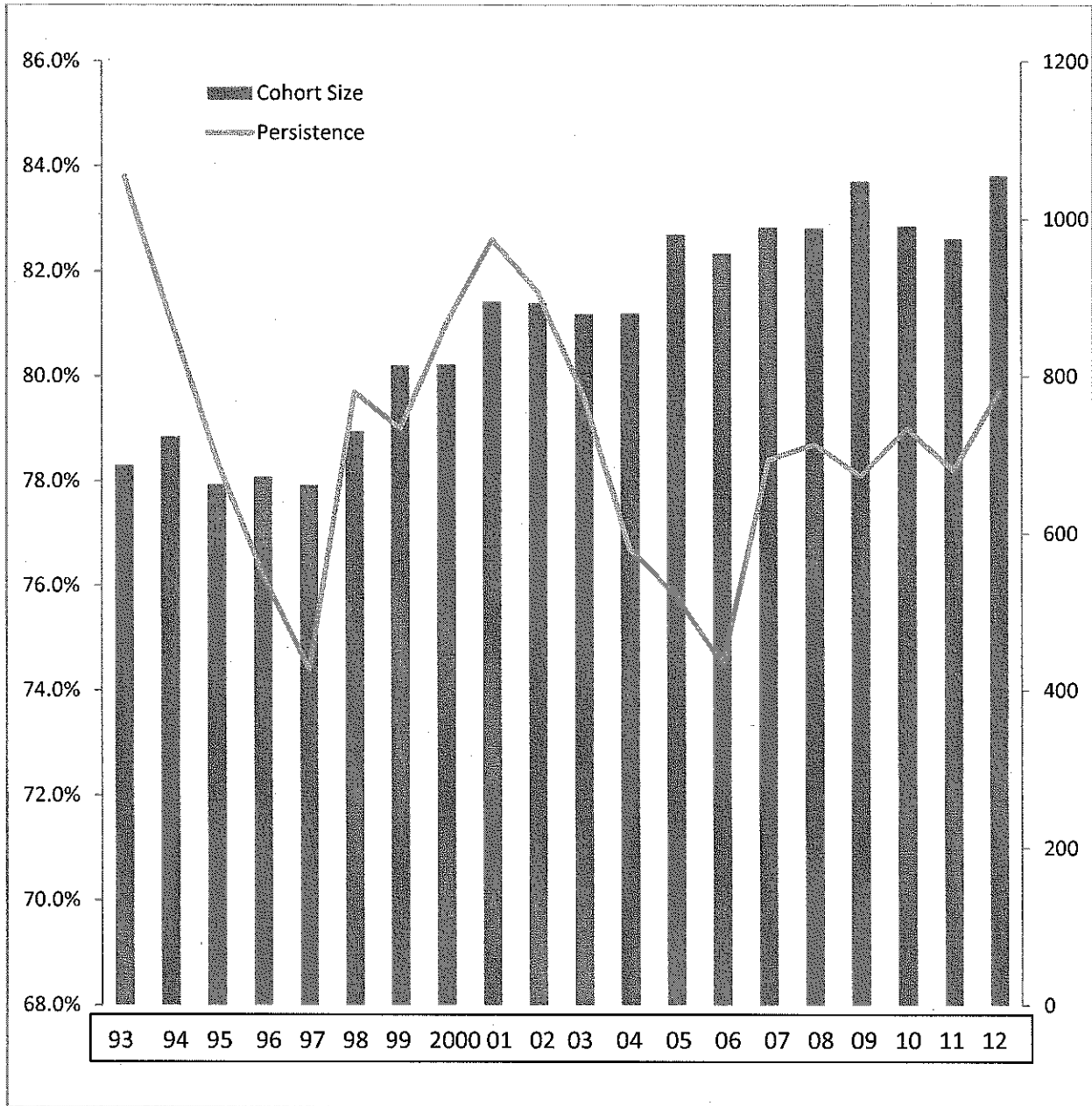


Longwood 6-Year SSI By Race

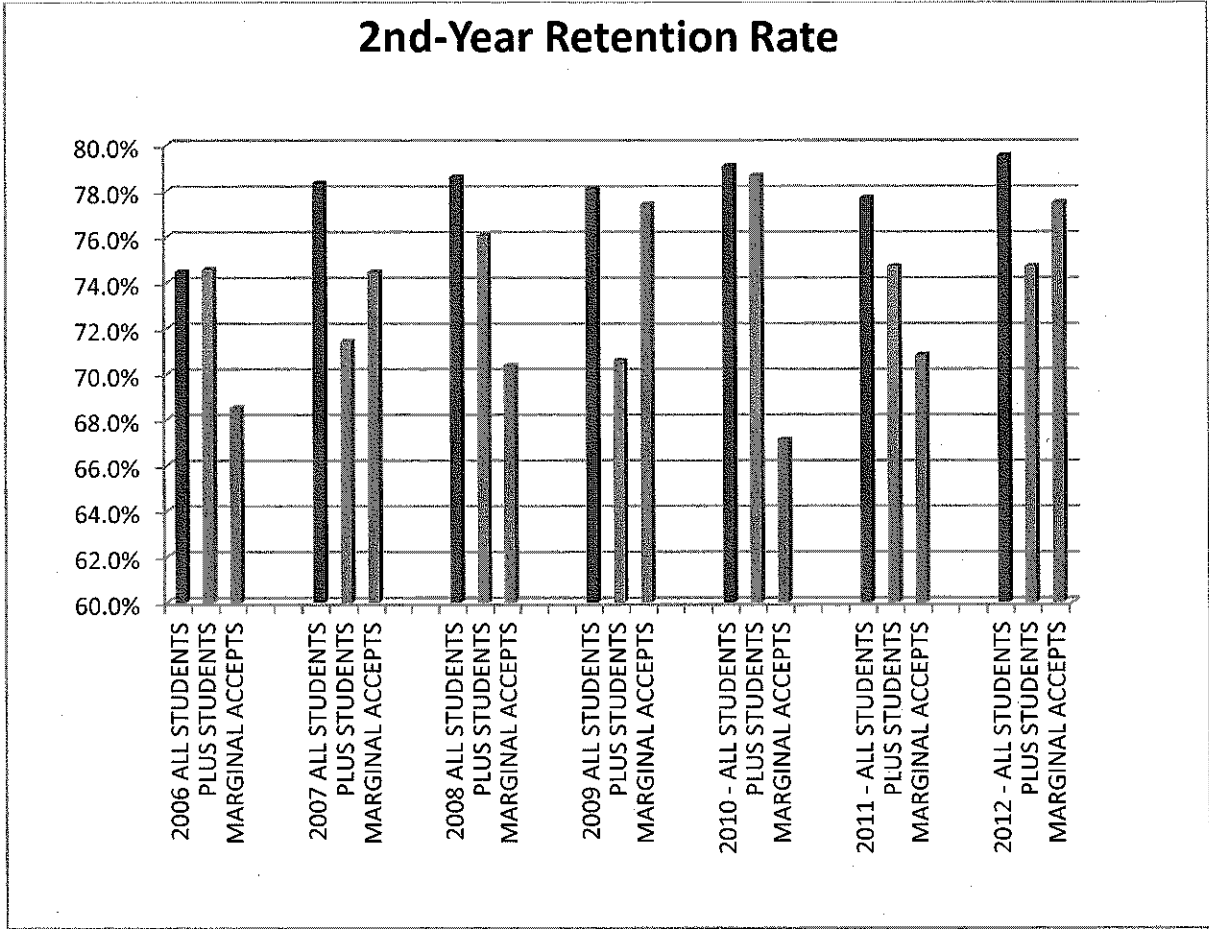


APPENDIX 3 – RETENTION RATE BETWEEN FIRST AND SECOND YEARS

This chart shows how Longwood’s first-to-second year persistence rate has changed as enrollment has grown. The green line is the fall retention rate for second-year students from the fall of 1993 through the fall of 2012, measured in units along the left vertical axis. The red bar lines, measured in units on the right side of the chart, show the size of the cohort of students each year.



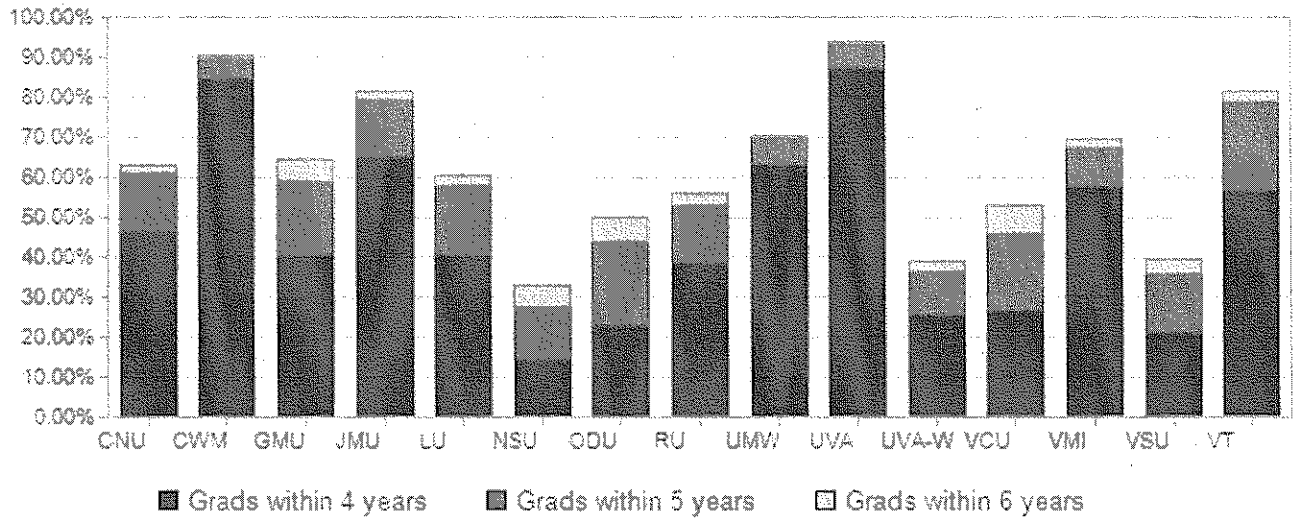
This chart shows the last few years of persistence data for the full cohort of entering first-time, full-time students, alongside the persistence rates for students in the PLUS program and “marginal admits.” PLUS students persist at comparable rates to the student body as a whole.



Appendix 4 – Graduation Rates at Virginia Public Institutions

This graphic compares the graduation rates for the first-time, full-time freshmen students who started at Virginia public 4-year universities in 2005 (the most recent year the SCHEV site provides comparable data). It shows the range of rates among institutions, from 33.2% (Norfolk State) to 93.9% UVA. Source: <http://research.schev.edu/gradrates/cohortgradrates.asp>

Cohort Graduation Rates, 4-year Public Institutions



Appendix 5 – Longwood versus national peer institutions

This chart compares Longwood’s 6-year graduation rates to a group of peer institutions nationally as generated by The Education Trust based on such factors as size, mission and student academic and demographic profile.

[Choose Another College](#) [College Profile](#) [Graduation Rates](#) [Similar Colleges](#)

[PDF Download](#) [Excel Download](#) [Save Search](#)

LONGWOOD UNIVERSITY

Outcome Measure

[Graduation Rates](#)
[2011 6-Year Grad Rate](#)

Year

2011

Grad Rate Timeframe

6-Year

Most Similar Colleges

Top 15

[Main](#) [Grad Rates by Race OR Gender](#) [Grad Rates by Race AND Gender](#) [Grad Rates Over Time](#) [Retention and Progression Rates](#)

[Degrees Granted by Program Area](#) [College Characteristics](#) [Student Characteristics](#) [Admissions](#) [Cost and Financial Aid](#) [Finance and Faculty](#)

College	2011 6-Year Grad Rate	Underrrepresented Minority 6-Year Grad Rate	% Pell Recipients Among Freshmen	% Underrepresented Minority	Average High School GPA Among College Freshman	Estimated Median SAT / ACT	Total Price for In-State, On-Campus Students
Citadel Military College of South Carolina	70.3%	53.7%	26%	14.1%	3.38	1,085	\$22,949
SUNY College at Cortland	67.1%	63.1%	25%	10.2%	3.42	1,070	\$20,065
University of Nebraska at Kearney	60.6%	43.9%	40%	7.2%	3.30	1,050	\$17,658
Longwood University	60.3%	54.8%	23%	8.2%	3.34	1,014	\$22,869
Plymouth State University	59.1%	36.0%	27%	1.3%	2.98	968	\$21,850
SUNY College at Plattsburgh	58.9%	52.3%	34%	10.4%	3.19	1,040	\$18,197
Westfield State University	58.3%	47.1%	30%	8.2%	2.99	990	\$18,836
Keene State College	57.3%	38.9%	27%	2.6%	3.05	1,000	\$21,460
Georgia College & State University	55.3%	60.0%	20%	9.2%	3.42	1,140	\$21,175
University of Wisconsin-Green Bay	54.5%	41.4%	33%	4.5%	3.32	1,030	\$15,723
Winona State University	54.0%	32.7%	27%	3.6%	3.32	1,070	\$19,670
Framingham State University	51.7%	44.9%	28%	11.7%	3.11	1,005	\$19,593
SUNY College at Potsdam	51.1%	41.3%	46%	9.2%	3.20	N/A	\$19,223
Eastern Connecticut State University	48.6%	40.7%	26%	14.3%	3.00	1,040	\$24,696
University of Montevallo	43.4%	33.8%	35%	17.5%	3.34	1,070	\$16,270
Fort Lewis College	38.9%	23.5%	30%	28.3%	3.10	1,050	\$19,452

NOTE: Please use caution interpreting graduation rate data for schools with small numbers of freshmen attending full-time. Schools with small full-time freshmen cohort sizes may have graduation rates that fluctuate from year to year. Please refer to the "Number of Full-Time Students in the Freshman Cohort" variable in the Retention and Progression Rates tab, and then the Grad Rates Over Time tab.

APPENDIX 6 – Retention by School and Major

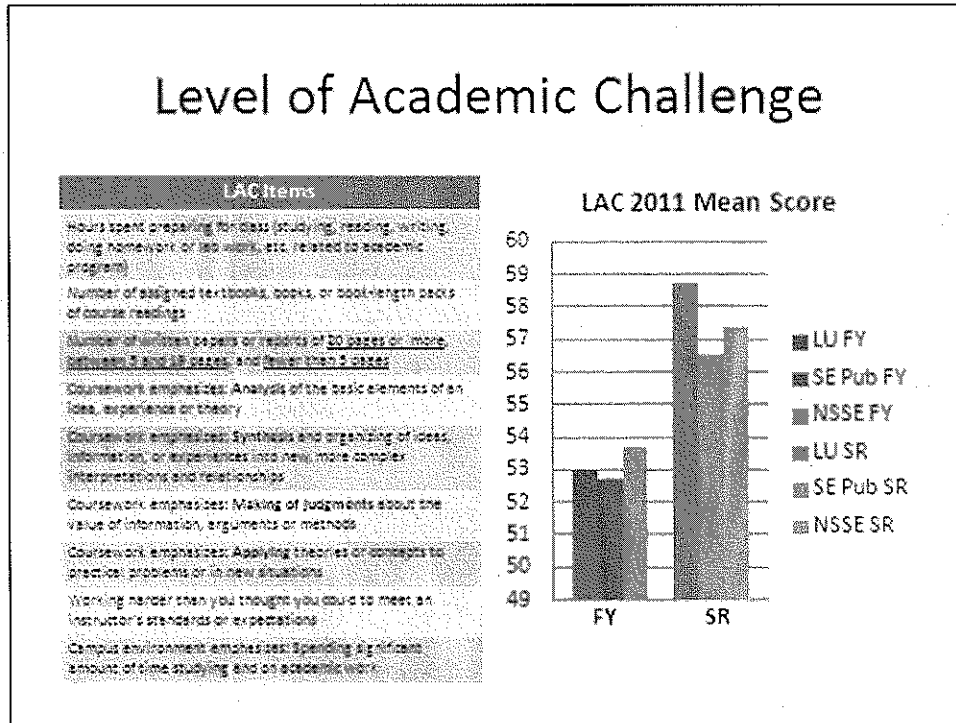
This chart offers the most-comprehensive to date breakdown of retention at Longwood by college and major. It shows, for each of the three schools and the majors within them, the number of students who entered in the fall of 2011, followed by the percentage of that cohort who two years later who 1) remain in that major 2) remain in the same college (even if they have changed majors) and 3) remain enrolled in the university.

Department	Total Entering	Still in Major	Still In College	Still in University
AS	867	59.4%	73.0%	79.7%
ANTH	7	71.4%	100.0%	100.0%
BIOL	82	40.2%	57.3%	72.0%
CHEM	10	50.0%	80.0%	90.0%
CMSC	16	50.0%	50.0%	62.5%
CMST	39	53.8%	69.2%	71.8%
CRIM	59	76.3%	79.7%	81.4%
ENGL	36	61.1%	69.4%	72.2%
FAAR	31	58.1%	77.4%	80.6%
FAMU	15	66.7%	80.0%	80.0%
FATH	20	80.0%	85.0%	85.0%
HIST	42	69.0%	76.2%	78.6%
LST	166	77.7%	81.9%	85.5%
LSTE				
MATH	13	46.2%	69.2%	76.9%
MOLA	5	60.0%	80.0%	80.0%
NURS	41	82.9%	87.8%	90.2%
PHYS	16	50.0%	81.3%	81.3%
POSC	18	66.7%	66.7%	66.7%
PSYC	46	69.6%	80.4%	82.6%
SOCL	4	75.0%	100.0%	100.0%
UNDC	201	37.8%	63.7%	78.1%
BE	81	0.0%	60.5%	70.4%
BADM	0			
PBUS	78	53.8%	59.0%	69.2%
PECO	2	50.0%	100.0%	100.0%
ECON	1	100.0%	100.0%	100.0%
EH	107	45.8%	68.2%	86.0%
ATTR	45	17.8%	60.0%	77.8%
KNSL	31	61.3%	67.7%	90.3%
PCSD	15	73.3%	93.3%	100.0%

PHED	0			
SOWK	7	71.4%	71.4%	100.0%
TREC	9	66.7%	66.7%	77.8%

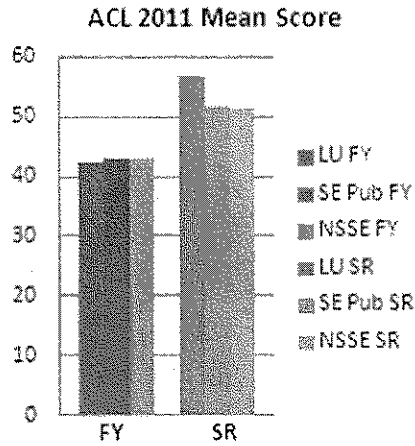
APPENDIX 7 – Longwood compared to peers on National Survey of Student Engagement

This chart shows some key findings related to Longwood on the National Survey of Student Engagement in the survey's five benchmark areas for student engagement. It shows the scores of Longwood freshmen and seniors next to the comparable mean figures for Southeastern public universities, and universities nationally. Except in the final category, the percentage of students reporting a "supportive campus environment," Longwood seniors generally do substantially better than Longwood freshmen, relative to peer institutions.



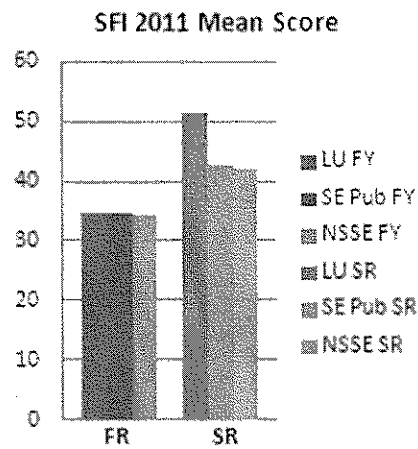
Active and Collaborative Learning

ACL Items
Asked questions in class or contributed to class discussions
Made a class presentation
Worked with other students on projects during class
Worked with classmates outside of class to prepare class assignments
Tutored or taught other students (paid or voluntary)
Participated in a community-based project as part of a regular course
Discussed ideas from your readings or classes with others outside of class



Student-Faculty Interaction

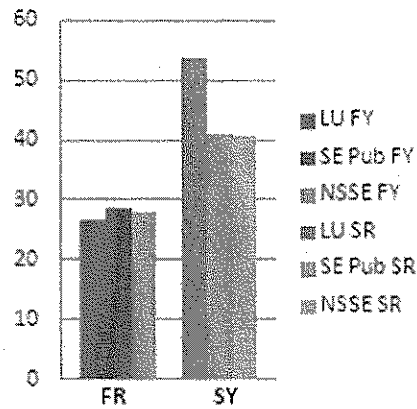
SFI Items
Discussed grades or assignments with an instructor
Talked about career plans with a faculty member or advisor
Discussed ideas from your readings or classes with faculty members outside of class
Worked with faculty members on activities other than coursework (committees, orientation, student-life activities, etc.)
Received prompt written or oral feedback from faculty on your academic performance
Worked on a research project with a faculty member outside of course or program requirements



Enriching Educational Experiences

EEE Items
Hours spent participating in extracurricular activities (organizations, campus publications, student gov., social fraternities or sororities, etc.)
Practicum, internship, field experience, co-ops experience, or clinical assignment
Community service or volunteer work
Foreign language coursework and study abroad
Independent study or self-designed major
Outlining senior experience (options course, senior project or thesis, comprehensive exam, etc.)
Serious conversations with students of different religious beliefs, political positions, or personal values
Serious conversations with students of a different race or ethnicity of an new class
Using electronic medium (e.g., lecture, chat group, internet, instant messaging, etc.) to discuss or complete an assignment
Campus environment encouraging contact among students from different economic, social, and racial or ethnic backgrounds
Participation in a learning community or some other formal program where groups of students take two or more classes together

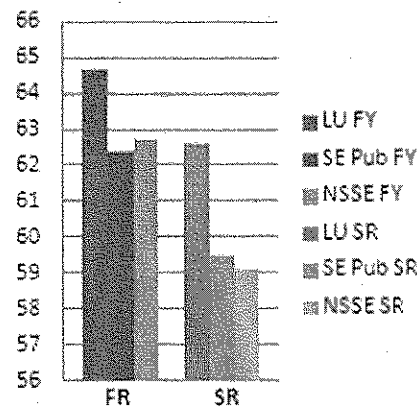
EEE 2011 Mean Score



Supportive Campus Environment

SCE Items
Campus environment provides the support you need to help you succeed academically
Campus environment helps you cope with your non-academic responsibilities (work, family, etc.)
Campus environment provides the support you need to thrive socially
Quality of relationships with other students
Quality of relationships with faculty members
Quality of relationships with administrative personnel and offices

SCE 2011 Mean Score



APPENDIX 8 – Preliminary and Informal Survey Data on Students Who Have Left This Fall.

The registrar's office has been trying to gather more comprehensive data on the reasons students leave. These represent preliminary results of surveying students who have withdrawn so far this fall. Because this information has only been gathered since September, it is a running total and does not include students who would be asked to withdraw for academic reasons at the end of a semester.

WITHDRAW_REASON	Total	% Total
Academic Difficulty	10	3%
Academic Dismissal	1	0%
Administrative Withdrawal	1	0%
Attending Other Educ Inst	1	0%
Change Career Focus	3	1%
Disciplinary Dismissal	4	1%
Disciplinary Suspension	13	3%
Educational Leave	20	5%
Employment	3	1%
Family Leaving Area	2	1%
Family Problem	1	0%
Financial	30	8%
Foreign Language Req. not met	6	2%
Grad Deg Time Limit Expired	1	0%
Health	3	1%
LU Not offering needed course	1	0%
Medical	28	7%
Military Duty	3	1%
No Reason Given	33	9%
Non Reg, One term remains	3	1%

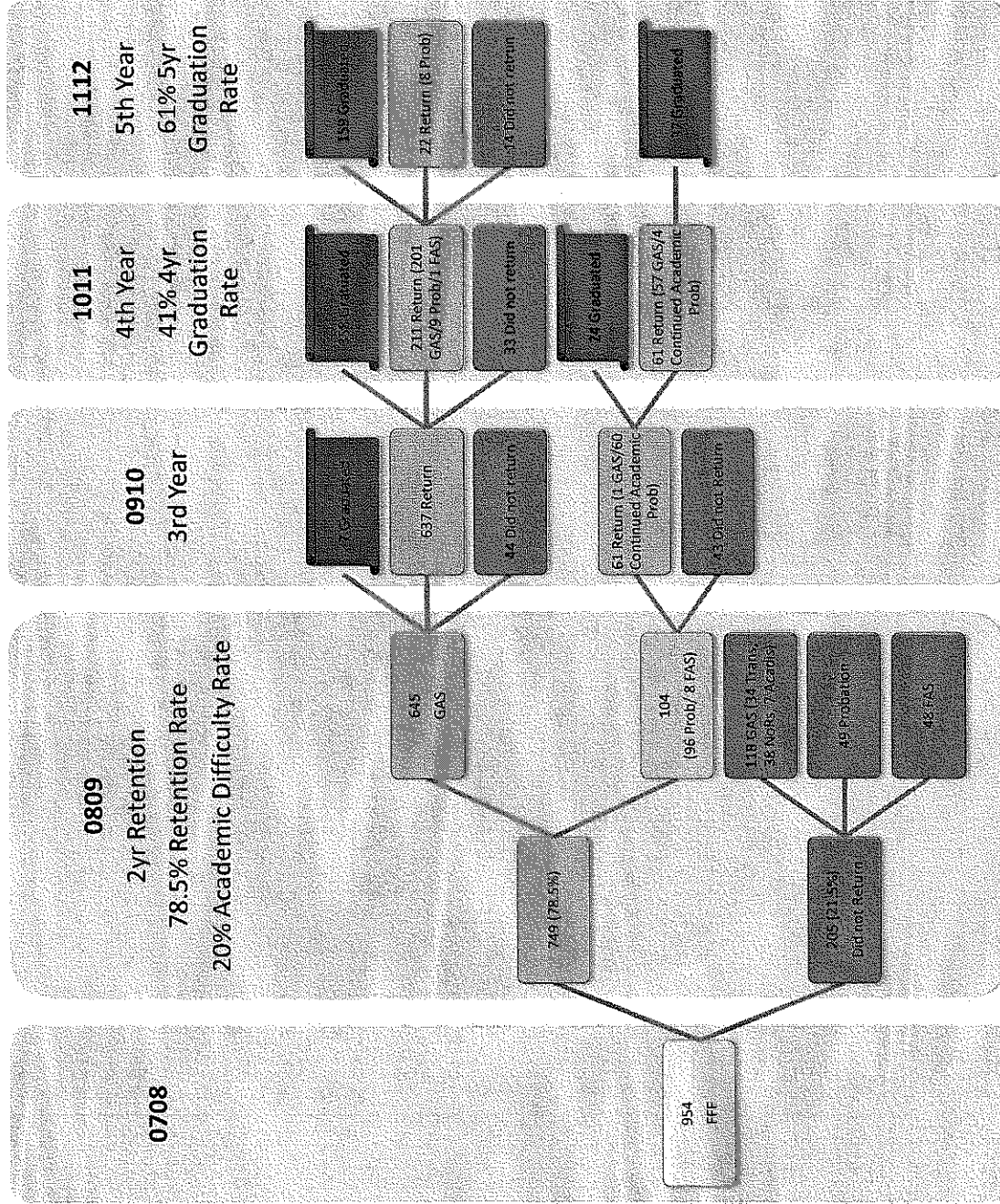
Non-Institution Program Abroad	1	0%
Other	16	4%
Personal	35	9%
Suspended	74	19%
Transfer	90	23%
Travel	1	0%
Work Conflict	1	0%
Grand Total	385	100%

Of the 90 students who have transferred we know why 24 have left ...

Transfer Reason	Total	% Total
Better program	2	8%
Family Reasons	1	4%
Final Degree req. at other	3	13%
Financial	2	8%
Housing Problem	1	4%
Leaving Area	3	13%
LU did not meet expectations	2	8%
Major Change	3	13%
Out of State Student	2	8%
Sports Transfer	4	17%
Work too difficult	1	4%
Grand Total	24	100%

APPENDIX 9 – OUTCOMES OF 2007-2008 COHORT YEAR.

Figure 1. Anticipated Outcomes for FFF* Cohort Year



Definitions: GAS=Good Academic Standing, Prob=Probation, FAS= First-Time Academic Suspension, Trans=Transfer, NoRs=No Reason, Acadis=Academic Discipline. Of those GAS non-returning after the 1st year, 86 provided information as to the reason. The top three reasons are noted.

Tab 14

LONGWOOD UNIVERSITY

IMPROVING ANNUAL RETENTION RATES OVER AN ACADEMIC CAREER

PRELIMINARY RESULTS FROM AN
APPLICATION OF STATISTICAL LEARNING
TECHNIQUES ON MULTIPLE STUDENT
COHORTS

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IMPROVING ANNUAL RETENTION RATES

PRELIMINARY RESULTS FROM AN APPLICATION OF STATISTICAL LEARNING TECHNIQUES ON MULTIPLE STUDENT COHORTS

EXECUTIVE SUMMARY

Statistical learning models provide a unique opportunity to create a data driven approach to identify at-risk students at multiple stages of their academic career. By doing so, Longwood can better develop clear sets of strategies designed to improve the retention of students throughout their academic career. Specifically, models are developed at six stages of a student's career, each of which provides a prediction of whether the student will be retained in the following academic year. Estimation begins at the beginning of the freshman year, and then a second model is developed and used after the winter inter-session. Similar models are derived for the sophomore and junior years. This report will provide a comprehensive presentation of the output statistical learning models generate and how such models can be used in practice. Data were compiled from 5 cohorts of students beginning with the incoming 2007/08 freshman class and ending with the 2011/12 freshman class. The initial retention model consist 4850 students, and the last retention model was estimated using 2619 students. We find that the admissions, financial aid, and academic information readily available produce very powerful predictive models. Together with graduation rate analyses, Longwood will be unique and effective in its approach towards improving student outcomes.

- **6 Models (2 for each class standing)**
- **5 Cohorts**
- **4850 Initial Students**

This report is organized as follows:

- Methodology and sample characteristics
- Models 1-6: Freshman 1, Freshman 2, Sophomore 1, Sophomore 2, Junior 1, Junior 2
- Output
- Results for policy-makers
- Sample policy recommendations

METHODOLOGY AND SAMPLE CHARACTERISTICS

In contrast to traditional statistical analyses that seek to estimate and test causal relationships, machine learning (often applied to big data) is designed to provide the most accurate predictive model possible. We seek to develop strategies that significantly improve Longwood's retention rates at every stage of a student's academic career. The success of these initiatives will depend critically on accurately predicting which students are likely to be retained from year to year. Once built, these models can continuously be modified every semester as new data are available, and each existing student can be classified as either being retained or not being retained. Additionally, each model will estimate the importance of all predictor variables as well as provide nuanced depictions of the functional relationships of predictors. Finally, information regarding the predictive accuracy of the models is presented.

No model is perfect – they all contain errors. In our case, there are two potential errors: predicting a student to be retained who actually does not, and predicting a student not to be retained who actually is. The particular machine learning technique employed here, termed “Random Forests” allows the researcher to build into the model a particular cost ratio with respect to the two errors. For example, if policy-makers deem failing to accurately identify a student who is not retained as more costly as identifying a student as being at-risk who actually is retained, the model can be built to accommodate that preference. In all models, a **5:1 cost** ratio has been adopted: miss-classifying students as being retained when they are not will occur five times less frequently than miss-classifying students as not being retained when they indeed do return. Given the purpose is to increase retention rates it seems reasonable to specify such a cost ratio. However, these cost ratios can be adjusted to suit the preferences of policy-makers.

METHODOLOGY

Six retention rate models were developed using five cohorts of students. The first model was estimated using only admission and initial financial aid information. This model will enable policy-makers to identify freshmen who are unlikely to return for their second year even before they begin their first class at Longwood. The second model is estimated using all variables included in model 1 plus all academic information from their fall and inter-session classes of their freshman year. As some of these students return for their spring semester we can re-classify students and even more accurately flag those students who are predicted not to return for their second year. Models 3 and 4 follow suit for the second year, and models 5 and 6 are for the third year. Given that not all students are retained from semester to semester, each model is estimated using fewer observations but more variables. However, we find that this trade-off is such that subsequent models generally do a better job at classifying students as graduating or not.

Each model was estimated using roughly $\frac{3}{4}$ of the data (the “training data set”) and evaluated in with $\frac{1}{4}$ of the data (the “test” data). All estimates involved multiple passes through the data (in the thousands). With a response variable that is binary (retained = 1, not retained = 0), the machine learning procedure “Random Forests” was adopted. For a variety of technical reasons, this technique produces the most accurate predictive model estimates given the nature of our data.

SAMPLE CHARACTERISTICS

COHORT	SAMPLE SIZE	GRADUATION RATE
Retention from Year 1 to 2	4580	78.6%
Retention from Year 2 to 3	3813	89.2%
Retention from Year 3 to 4	3404	73.5%

Table 1: Sample Size and Retention Rate

As shown in Table 1, models are based on relatively large sample sizes, with retention rates highest from year 2 to 3 and lowest (somewhat surprisingly) from year 3 to 4. Incomplete data were primarily from students who left a year and then returned, which created a hole in their data and therefore had to be removed from the sample.

PREDICTOR VARIABLE LISTS

VARIABLE	MODEL 1: FRESHMAN 1 (N=4850)	MODEL 2: FRESHMAN 2 (N=4850)	MODEL 3: SOPHOMORE 1 (N=3763)	MODEL 4: SOPHOMORE 2 (N=3763)	MODEL 5: JUNIOR 1 (N=2626)	MODEL 6: JUNIOR 2 (N=2619)
Admission Data (HSGPA, SAT, RACE, GENDER, Etc)	X	X	X	X	X	X
Admission Financial Data (FASFA Related)	X	X	X	X	X	X
Year 1 Fall and Intersession Academic Info (Credit hours, GPA, Intersession, Major Change, Goals, Etc)		X	X	X	X	X
Year 1 Spring and Summer Academic Info and New FASFA			X	X	X	X
Year 2 Fall and Intersession Academic Info (Credit hours, GPA, Intersession, Major Change, Goals, Etc)				X	X	X
Year 2 Spring and Summer Academic Info and New FASFA					X	X
Year 3 Fall and Intersession Academic Info (Credit hours, GPA, Intersession, Major Change, Goals, Etc.)						X

Table 2: Predictor Variables of Annual Retention Rates

Table 2 provides a very broad and descriptive list of predictor variables included in the analyses. Each model is estimated with information available just prior to the beginning of the fall and spring semesters. An incoming freshman, therefore, will only have admission and initial financial aid information. However, all five cohorts will be represented leading to a relatively large sample size. As we progress through each model the variable list expands – most notably with academic

information – but the sample sizes diminish as students are not retained. A full list of predictor variables is available upon request.

MODEL 1: BEGINNING OF FRESHMAN YEAR

Using all five cohorts, this model predicts whether a student will return for a second year based only on information available to policy-makers at the beginning of a student’s academic career at Longwood. We are able to classify students as retained or not retained, and estimate the relative importance of predictor variables in contributing to our forecast accuracy. The tables below highlight the results. Table 3 captures the model’s forecasting accuracy, and is followed by the variable importance plots for both TRUE (predicting a student will be retained) and FALSE (predicting a student will not be retained) classifications. We allow for the possibility that the important variables that predict students being retained may be different than those that predict that a student will not be retained. Finally, partial dependence plots, which show the functional relationship between the response and predictor variable, are provided for particularly noteworthy variables.

Actual Class	Predicted Class			Model Error
	FALSE	TRUE		
FALSE	159	82		.3402
TRUE	401	570		.4129
Use Error	.7171	.1258		

Table 3: Confusion Table for Model 1

Table 3 demonstrates Model 1’s predictive ability. It is important to recall the assumed 5:1 cost ratio in which we prefer to make five times as many false predictions regarding not being retained in year 2 compared to falsely predicting someone will be retained when they are not. This is verified with the number of true (i.e., will be retained) values compared to false (will not). The use error rate is particularly illuminating as it indicates the errors made when predicting. As shown, when the model predicts a false outcome, it will be wrong 72% of the time. In contrast, when the model predicts a true outcome it is wrong only 13% of the time. Additionally, we are predicting that roughly 46% of incoming freshman will not be retained in year 2. This makes sense given the 5:1 cost ratio specified in the model (as compared to the actual rate of not retained of 21%).

Variable Importance Plot for TRUE Classification of RY2 at Y1

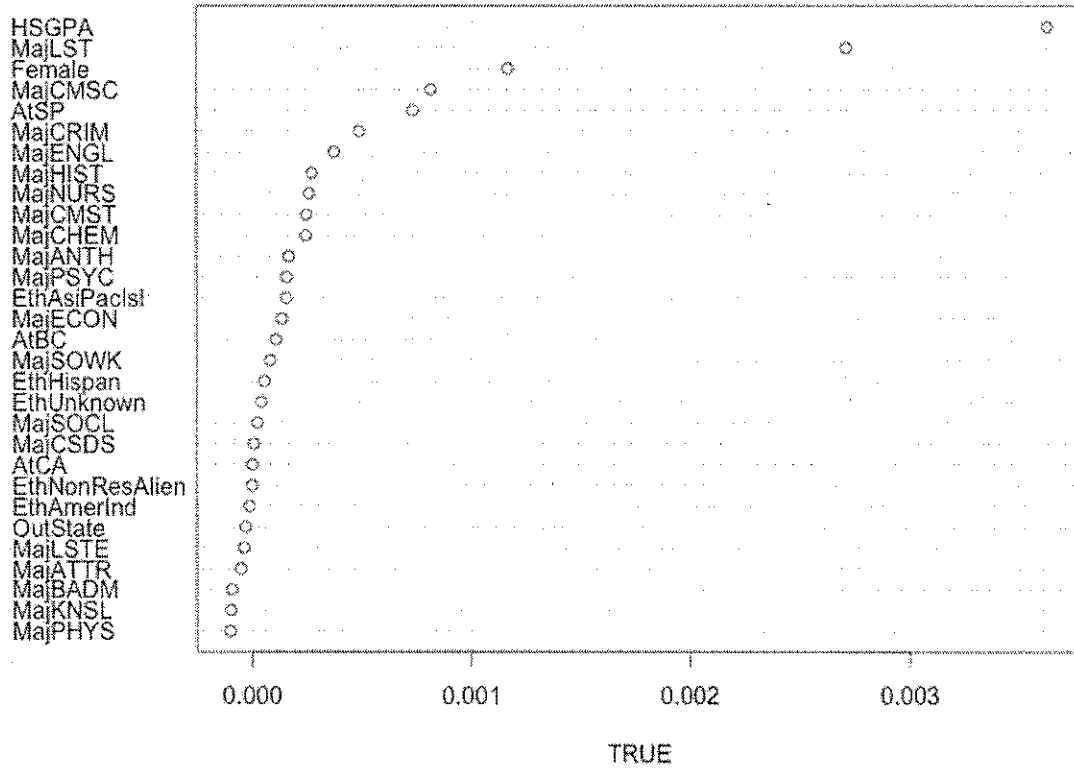


Figure 1: Variable Importance Plot for Retention from Fall, Year 1 to Year 2

As shown, high school GPA appears to be the most important variable in accurately predicting that a student will be retained in year 2 given information at the outset. Notably, SAT and FASFA information have no predictive ability in determining retention at this stage.

Variable Importance Plot for FALSE Classification of RY2 at Y1

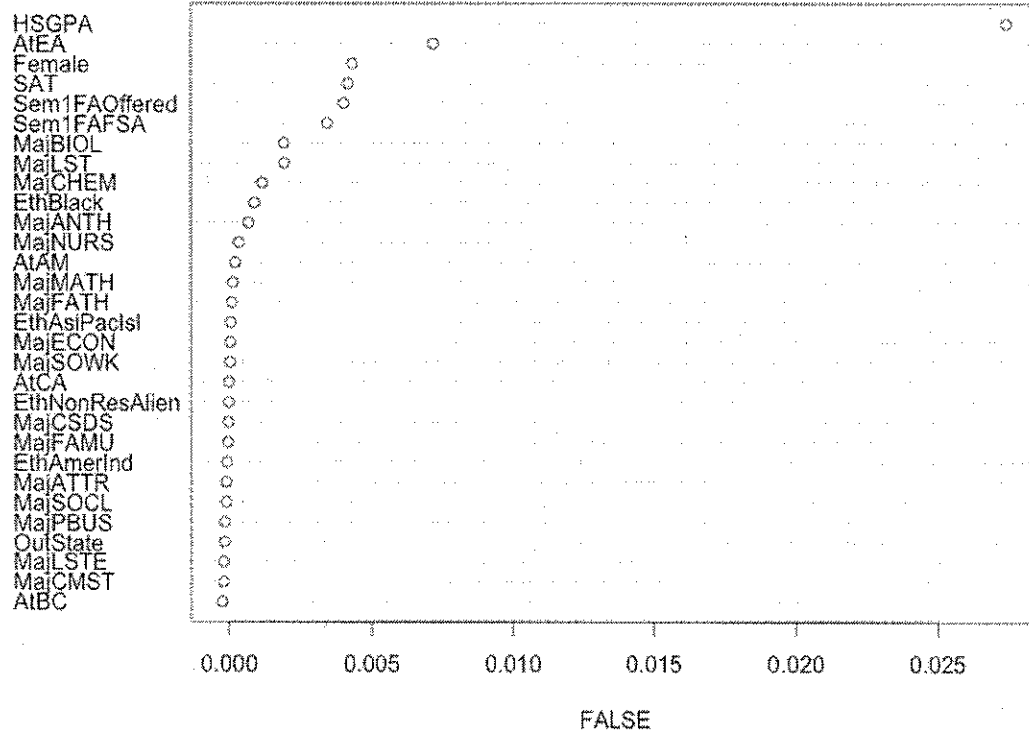


Figure 2: Variable Importance Plot for Not Being Retained in Year 2

Once again, high school GPA is the most important predictor variable. However, unlike predicting graduation in four years, predicting NOT graduating relies more heavily on the financial situation of the student, their gender, and their SAT score. It is important to keep in mind that these distinctions involve relatively small differences – the scale indicates that each individual variable contributes little in isolation.

Partial Dependence on HSGPA

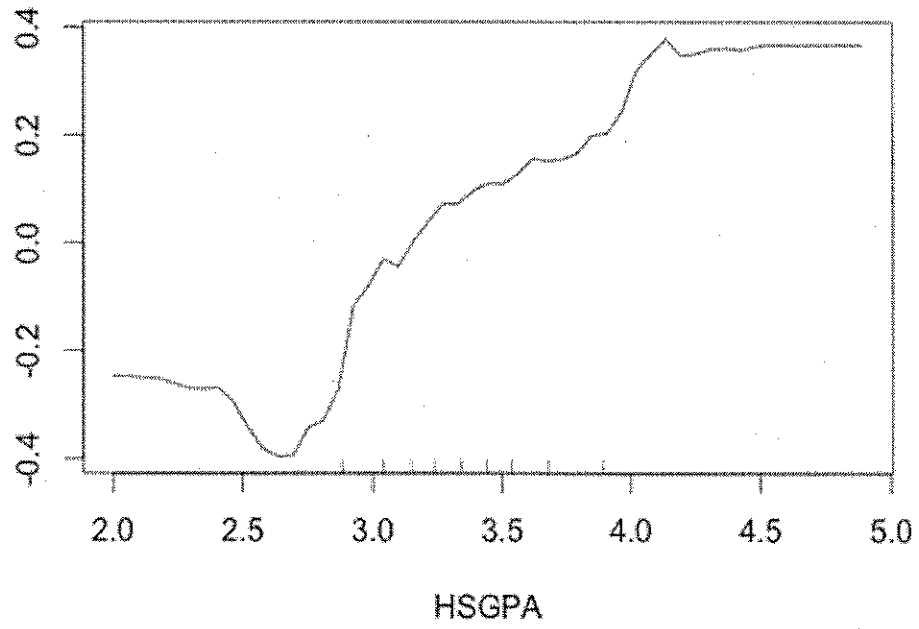


Figure 3: Relationship between High School GPA and Contribution to Model's Fit

Figure 3 suggests that as high school GPA increases from about 2.75 there is a steady increase in the likelihood of being retained.

Partial Dependence on SAT

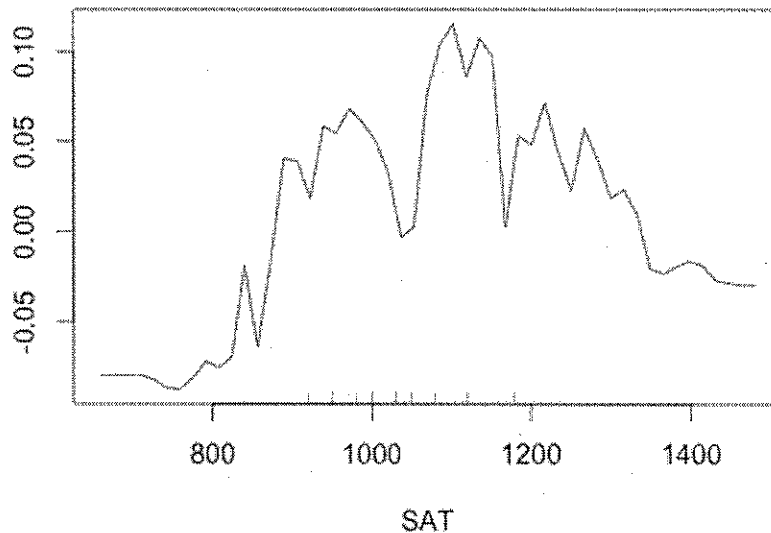


Figure 4: Relationship Between SAT and Year 2 Retention

Figure 4 shows a steady increase in retention for rising SAT scores up to about 1100. After that, increases in SAT scores correspond with a lower likelihood of being retained. This result may help policy-makers distinguish between students who leave for academic poor performance and those who leave to pursue academically more prestigious opportunities. As such, policy-makers attempting to increase retention of our top students may use an 1100 SAT cut-off as a way to identify students who fail to be retained that we most want to keep. The policy application section below illustrates this idea using the current freshman class.

Generally, partial dependence plots derived from Random Forests provide unique and subtle insights into the often complex functional forms that exist in the relationships between the response and predictor variables. However, because little surprises emerged in subsequent models, for space limitations we have decided to omit them for models 2-6. They are available upon request.

MODEL 2: SPRING OF FRESHMAN YEAR

Using data on all students who returned for the spring semester of their freshman year, this model predicts retention into year 2 using all variables from Model 1 plus all academic information from their fall and inter-session semesters. In particular, we have information regarding credit hours attempted relative to completed, GPA, goals attempted and performance on Goal 1, potential major change, and intersession and summer work (plus a few others).

Actual Class	Predicted Class			Model Error
	FALSE	TRUE		
FALSE	197	81	.2914	
TRUE	415	519	.4443	
Use Error	.6781	.1350		

Table 4: Confusion Table for Model 2

The error rates are quite similar to the first model, and importantly we are only wrong 14% of the time when we predict that a student will be retained when in fact they are not.

Variable Importance Plot for TRUE Classification of RY2 at Y1.5

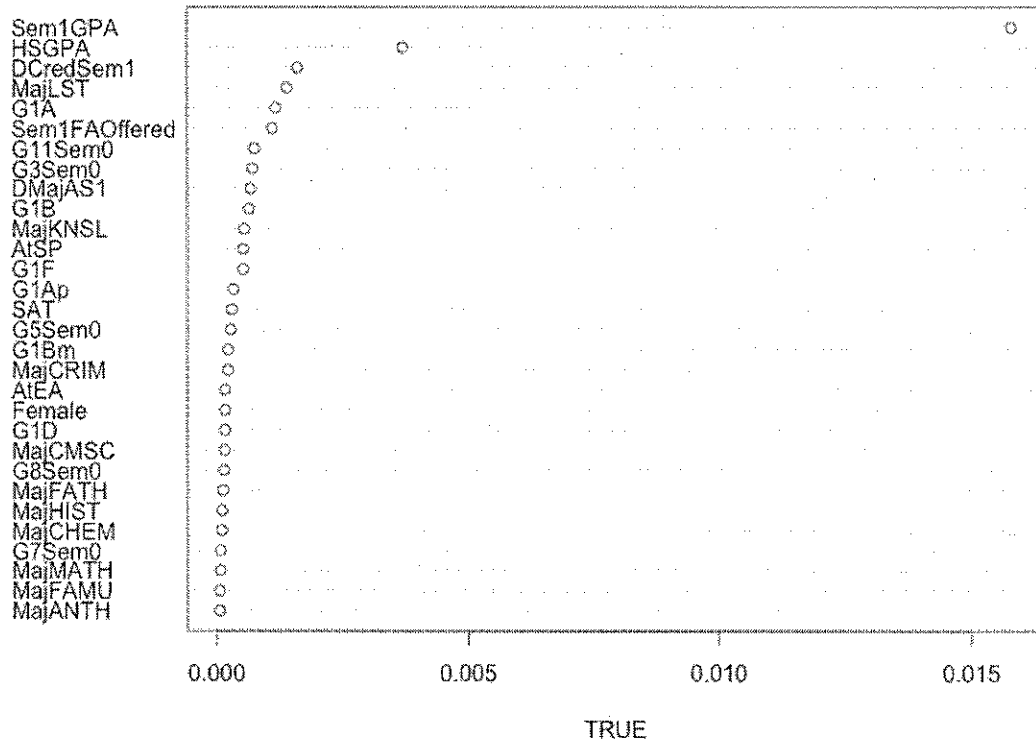


Figure 5: Variable Importance Plot for Being Retained in Year 2

Figure 5 indicates that academic performance measures are now the most important predictor variables for successful graduation in four years. Fall GPA and the difference between credit hours attempted and completed along with high school GPA top the list. Not surprisingly, university academic success matters more for retention than past performance in high school.

Variable Importance Plot for FALSE Classification of RY2 at Y1.5

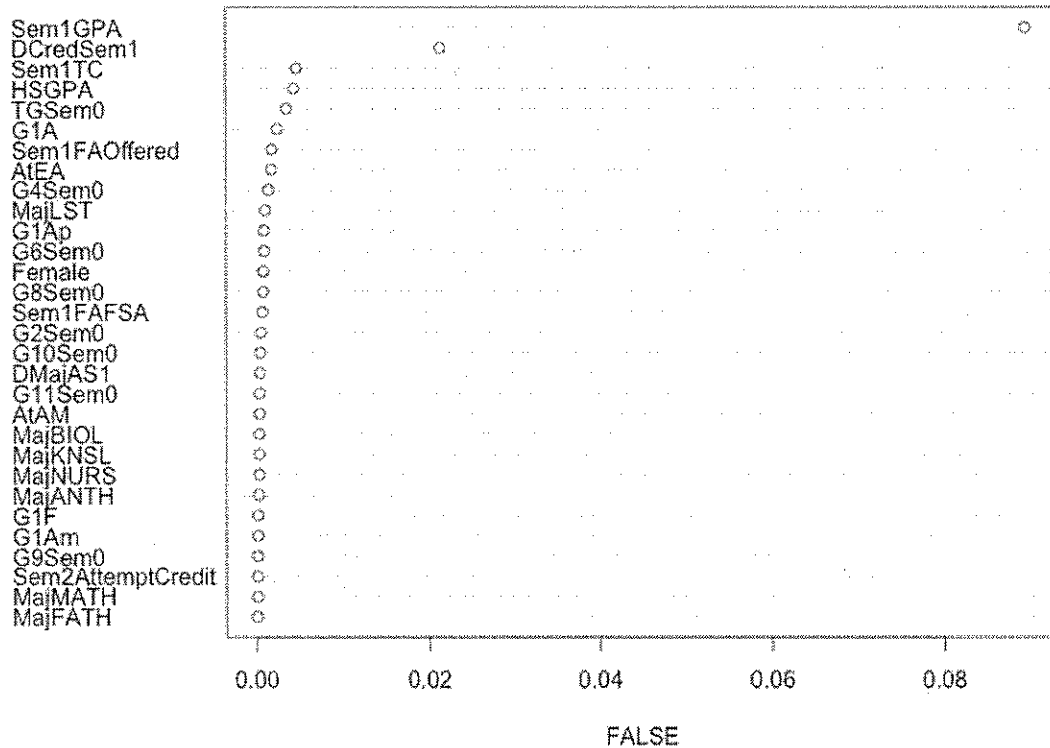


Figure 6: Variable Importance Plot for Not Being Retained in Year 2

The variables that help predict students who will NOT be retained in year 2 are similar to those predicting which students will be retained. Some differences arise, however, and include the importance of transfer credits, which help predict not being retained more than being retained. It is also important to note that high school GPA also remains important.

Finally, successful and early completion of General Education goals appear to play relatively little role in the predictive power of the model. At this point, there is little evidence to suggest that predicting retention rate outcomes (either successful or unsuccessful) depends critically on general education performance.

MODEL 3: BEGINNING OF SOPHOMORE YEAR

Using data on all students who were retained after their sophomore year, this model predicts retention into the third year using all variables from model 2 plus all academic and new financial aid information obtained after their freshman year. Essentially, we are simply adding new data on all the

previous academic and financial aid variables described earlier. Once again, the predictive power of the model continues to improve, and the distinctions between retention and not being retained become clearer.

Actual Class	Predicted Class			Model Error
	FALSE	TRUE	Model Error	
FALSE	51	50	.4950	
TRUE	239	601	.2845	
Use Error	.8241	.0768		

Table 5: Confusion Table for Model 3

As anticipated, despite a shrinking sample size the additional variables increase the model's predictive power. An important objective is to not only accurately predict which students will be retained, but also make sure we do not miss students who will not return for their third year. In both respects, the model is performing quite well.

Variable Importance Plot for TRUE Classification of RY3 at Y2

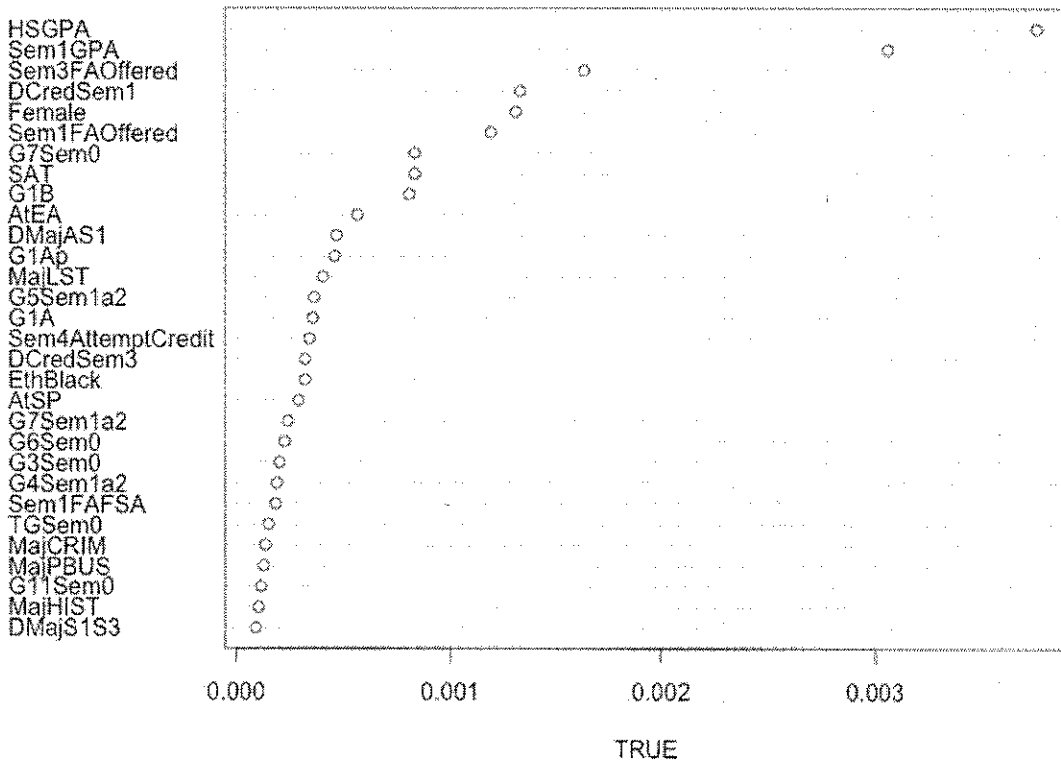


Figure 7: Variable Importance Plot for Retention for Year 2

As shown in Figure 7, high school GPA remains the most important predictor of being retained – even after an entire year's worth of academic work at the collegiate level. Subsequently, academic work and financial aid information seem to also help predict retention at this juncture.

Variable Importance Plot for FALSE Classification of RY3 at Y2

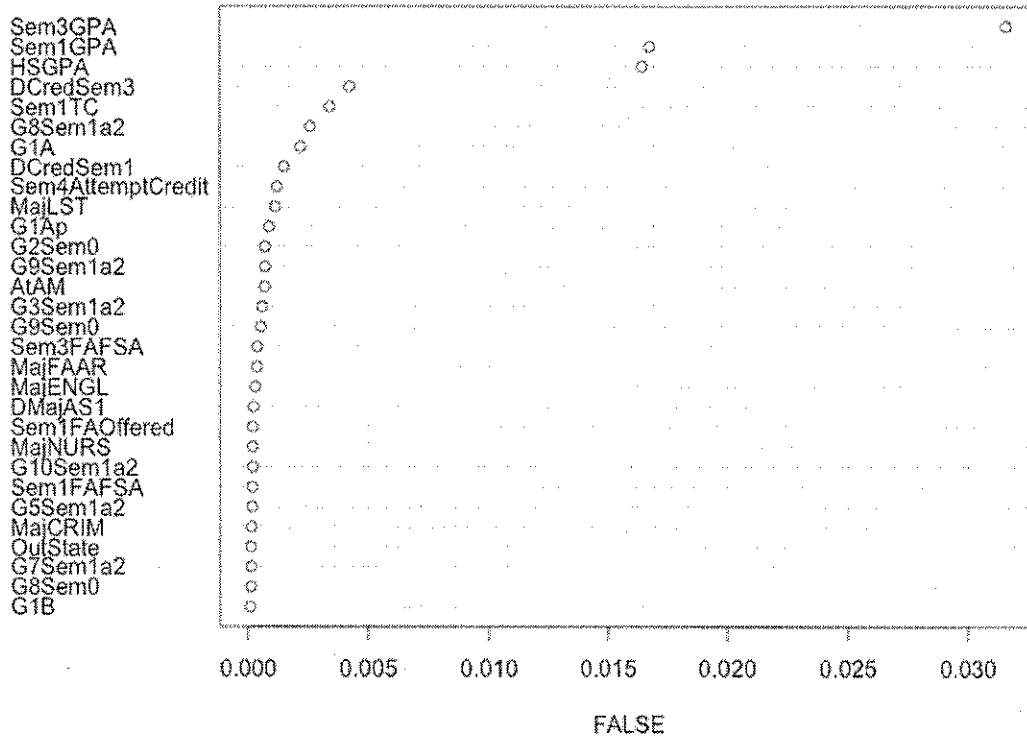


Figure 8: Variable Importance Plot for NOT Graduating in Four Years

Most recent college academic performance plays a lead role in being able to predict students who will return in year 2. High school GPA also retains predictive power. Notice also that semester three academic performance now is the most important predictor (unlike our model for predicting true classifications).

Overall, a pattern is emerging indicating that recent college academic success in terms of completing coursework and maintaining a solid GPA will lead to higher likelihood of retention in year 2. However, high school performance as measured by high school GPA retains important predictive power. Financial aid also plays a role, albeit a more minor one. Overall, strategies designed to improve fundamental student characteristics as well as initial college academic success may be important in improving second year graduation rates.

MODEL 4: SPRING OF SOPHOMORE YEAR

Model 4 proceeds in the same way as the previous models, but also includes academic information related to students' fall and inter-session of the sophomore year. Sample size will continue to diminish as students are not retained, but as shown below the predictive power of the model continues to be high.

Actual Class	Predicted Class			Model Error
	FALSE	TRUE	Model Error	
FALSE	42	44	.5116	
TRUE	221	634	.2585	
Use Error	.8403	.0649		

Table 6: Confusion Table for Model 4

Generally, the model is meeting our objectives: to ensure that students who are likely not to be retained are identified. Only 6 percent of those students predicted to be retained are not.

Variable Importance Plot for TRUE Classification of RY3 at Y2.5

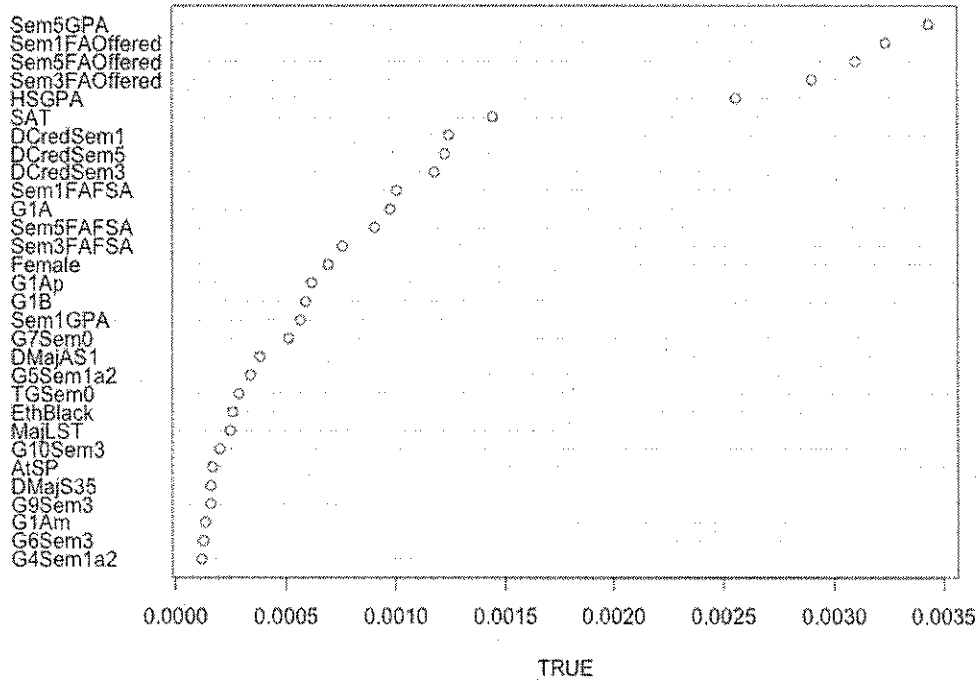


Figure 9: Variable Importance Plot for Retention in year 2

Figure 9 once again demonstrates the importance of most recent academic performance – both in terms completing registered coursework and GPA. High school information and SAT all relatively less to the predictive power of the model, but are still more important than other variables, including financial aid information.

Variable Importance Plot for FALSE Classification of RY3 at Y2.5

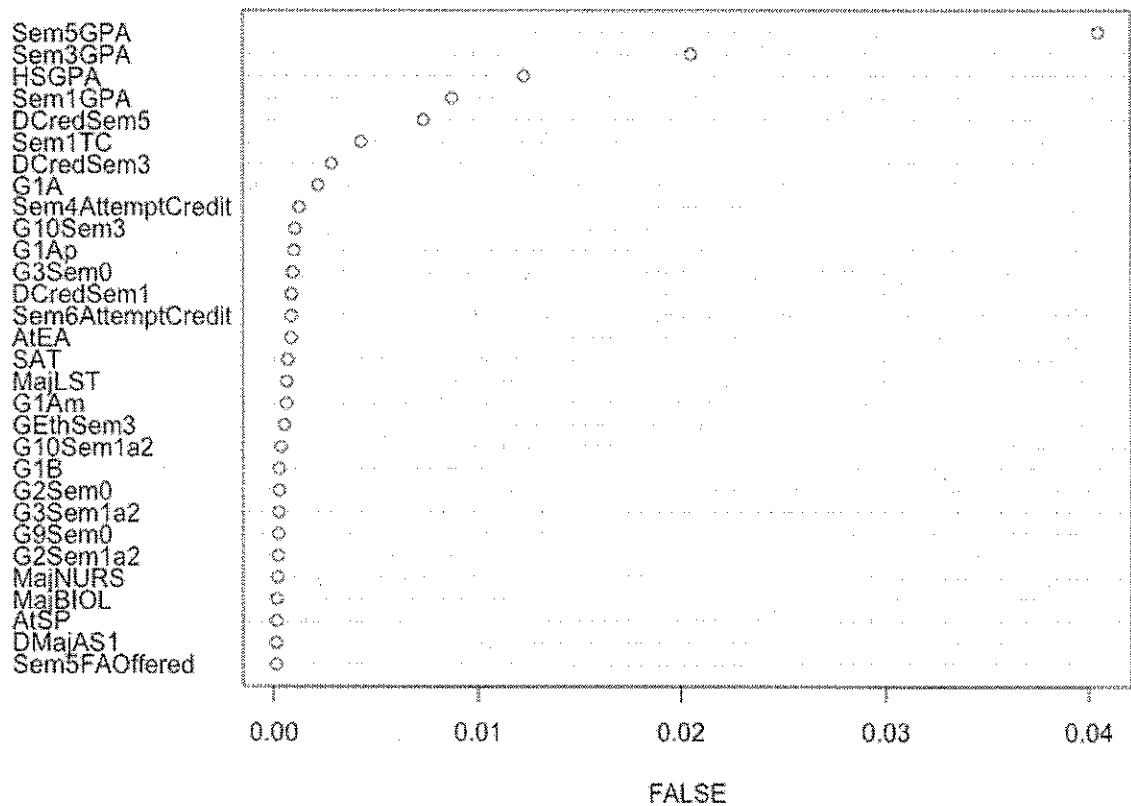


Figure 10: Variable Importance Plot for NOT Being Retained in Year 3

As shown in Figure 10, academic performance as well as high School GPA help predict students who will not be retained. Financial aid information does not appear to help identify student who will not be retained at this stage. Further, information regarding the latest academic performance appears to be most important in predicting students who will not return.

MODEL 5: FALL OF JUNIOR YEAR

Model 5 proceeds in the same way as the previous models, but also includes academic and financial information known at the beginning of the third year. Once again, sample sizes will naturally diminish, but more variables are included.

Actual Class	Predicted Class		
	FALSE	TRUE	Model Error
FALSE	19	19	.5000
TRUE	94	524	.1521
Use Error	.8319	.0349	

Table 7: Confusion Table for Model 5

Once again, the model is performing exceptionally given our priorities. Only 3% of predictions of students being retained are inaccurate. It is important to note that this is half the rate for graduation rate predictions at the same time in a student's academic career.

Variable Importance Plot for TRUE Classification of RY4 at Y3

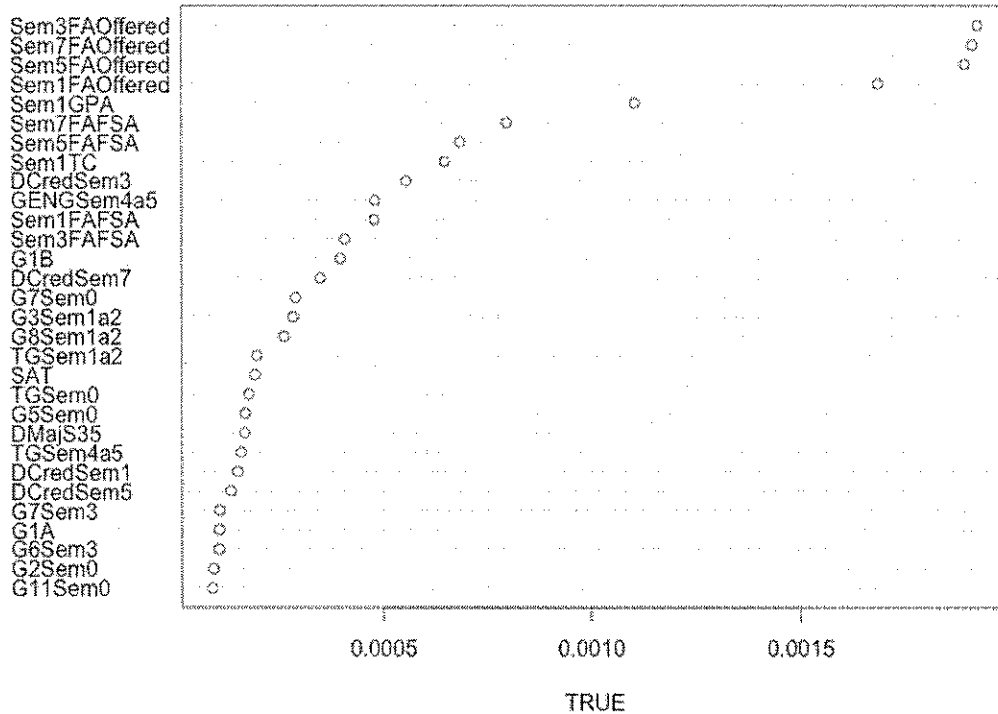


Figure 9: Variable Importance Plot for Retention in year 2

Figure 9 once again demonstrates the importance of most recent academic performance – both in terms completing registered coursework and GPA. High school information and SAT all relatively less to the predictive power of the model, but are still more important than other variables, including financial aid information.

Variable Importance Plot for FALSE Classification of RY3 at Y2.5

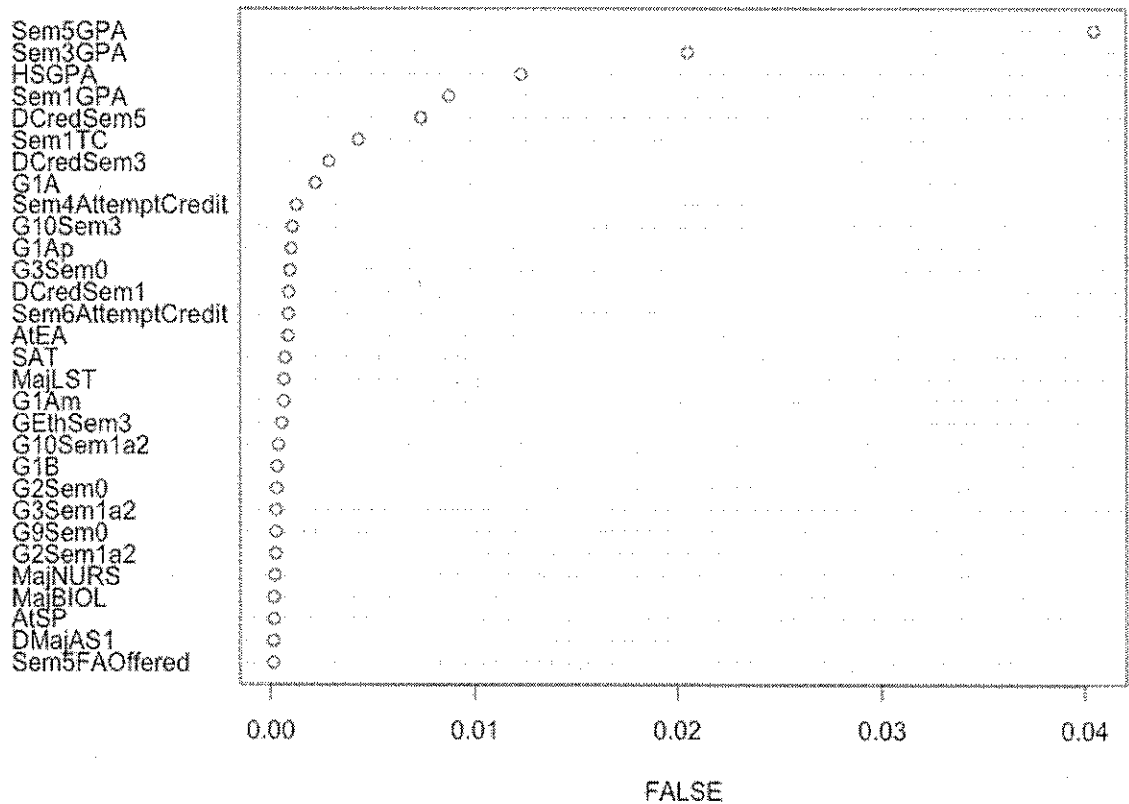


Figure 9: Variable Importance Plot for NOT Being Retained in Year 4

Figure 9 illustrates that both academic information as well as high School GPA help predict that a student will not be retained. Financial aid information, however, seems to have little predictive power.

MODEL 6: SPRING OF JUNIOR YEAR

Model 6 completes the analysis by examining the retention of students into their fourth year based on information obtained through the mid-way of their third year. As you can see below, much of the same conclusions apply, suggesting that policy prescriptions which are appropriate in previous semesters are likely to be effective here as well.

Actual Class	Predicted Class		
	FALSE	TRUE	Model Error
FALSE	26	19	.4222
TRUE	100	510	.1639
Use Error	.7937	.0359	

Table 8: Confusion Table for Model 6

The confusion table presented in Table 8 demonstrates once again our model is only misclassifying about one half of one student out of 19 cases in which we predict a student will be retained in year 4 when they actually will not be. Further, even the accuracy of predicting false classifications is improving, despite the cost ratio we have specified.

Variable Importance Plot for TRUE Classification of RY4 at Y3.5

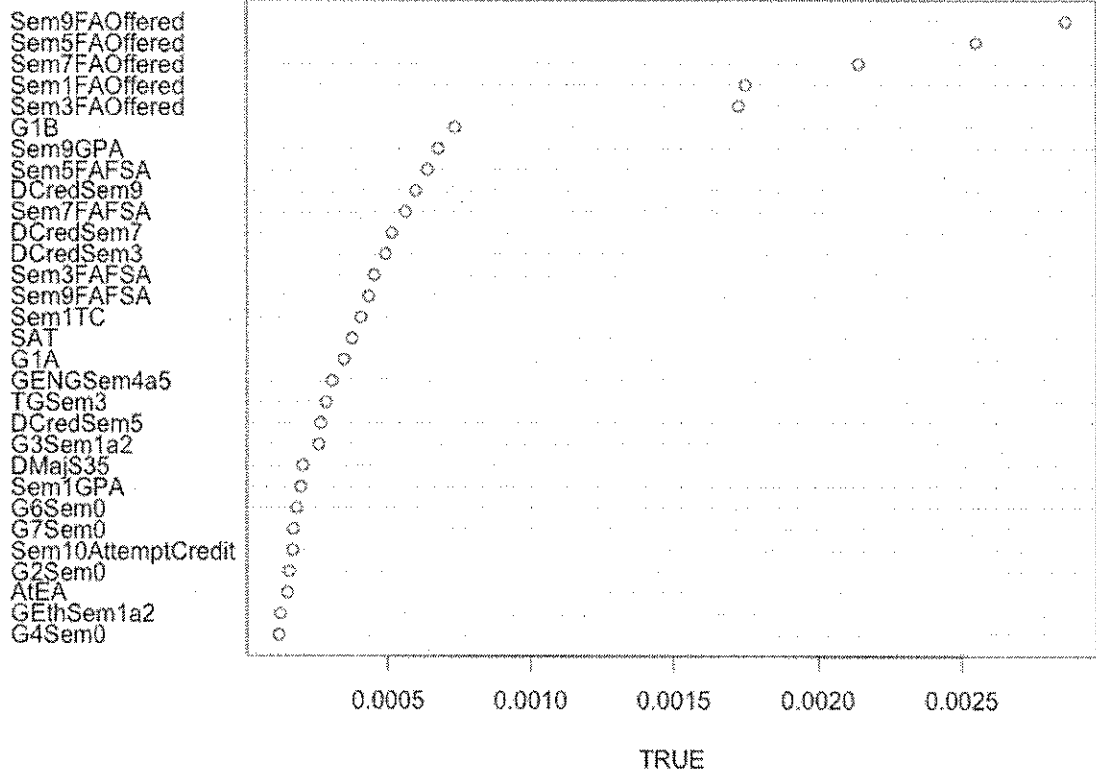


Figure 10: Variable Importance Plot for Retention in Year 4

Figure 10 may appear to run counter to previous work, but in fact it is entirely intuitive. Students who have high levels of financial aid offered halfway through their junior year most likely have every intention to return for their fourth year. As such, it is not surprising that financial aid helps identify students who, at this stage, will return.

Variable Importance Plot for FALSE Classification of RY4 at Y3.5

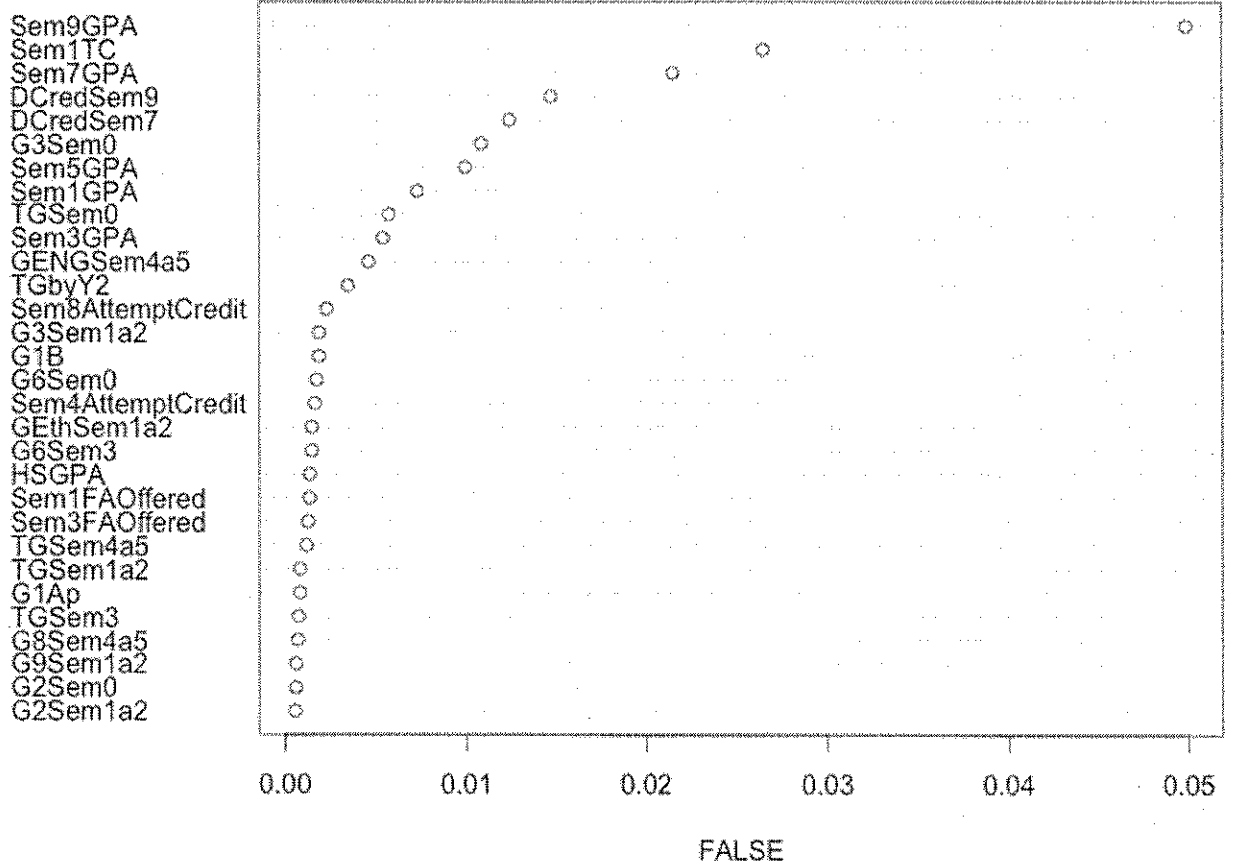


Figure 10: Variable Importance Plot for NOT Being Retained in Year 4

Figure 10 provides a unique opportunity to illustrate the power of statistical learning models. Unlike all previous work, semester 1 transfer credits now is a very important predictor variable. We suspect that this is because students who enter Longwood with many transfer credits are likely to graduate in 3 years and therefore not be retained in year 4. In fact, roughly 60 students who were predicted not to be retained in year four actually graduated in four years.

RESULTS FOR POLICY-MAKERS

Developing successful strategies for improving retention depends critically on the policy-maker's ability to correctly flag students who are likely to return to Longwood. Informal, qualitative approaches have been the norm, but are often imprecise and difficult to scale up to the entire student body. A data driven approach provides a low-cost opportunity to alleviate these problems. However, empirical models which focus on estimating and testing causal relationships have their own drawbacks. Often based on rigid functional form assumptions, these models are consistently outperformed in terms of predictive accuracy by newer statistical learning models. These models, such as the Random Forests procedure used in this study, extract information from the data so as to maximize prediction power.

In addition to the valuable output outlined previously, the models built thus far can be applied to new data. By imputing current student data into the models, we will be able to classify current students at Longwood as either predicted to be retained or not. Indeed, we applied data from the freshman class of 2013 to the models to predict retention rates into year two. The results, and their meaning are described below.

SAMPLE POLICY RECOMMENDATIONS

Suppose that policy-makers wish to initially focus on increasing student retention of freshman who are excelling academically and may transfer to schools that they perceive to be stronger. We must first identify those students accurately, and then develop intervention strategies which may alter their decisions. Model 1 in this report could be used on 2013 freshman data to make such identifications. The variable importance plot of SAT score revealed a cut-off of 1100 at which student retention rates diminish, suggesting that high scoring SAT students are less likely to be retained. The outline below could be provided to policy-makers (along with student names) as an initial list of students worth exploring. The list can further be refined based on mid-semester academic information: those students who are performing well may in particular be likely to transfer to another prestigious school.

Which Students Were Targeted

- Targeted students are those who were predicted as not being retained for their sophomore year ("FALSE" in the model) and who had SAT scores above 1100.
- 78 students matched the above criteria.
- An SAT score of 1100 was chosen as the cutoff based on the following partial dependence plot, which shows the functional relationship between SAT scores and likelihood to be retained:

Expected Results

- The model has an error rate when predicting FALSEs for students with SAT scores above 1100 of ~72%. Therefore, about 56 of the 78 students would actually be retained without any intervention; about 22 students could have their retention outcomes potentially changed by an intervention.
- If the intervention is 100% successful in converting those 22 students who would not be retained to students who are retained, the retention rate for this cohort could be increased by a maximum of 2% over the expected retention rate without any intervention.

It is important to emphasize that this is just one of many examples for which these models can be used to improve retention – and, hence, graduation – rates at Longwood University.

Tab 15

Practically Human

Because they support the foundations of an educated mind, the humanities are utterly and ineluctably practical

by Wade Edwards

In times of transition, I tend to turn to the stars. So the year I came to Longwood, I visited an astrologist. “Learn to be rooted but strive to be free,” she advised. “Be prudent, be practical—but soar.”

This fall, with the same mix of caution and idealism once counseled by Madame Fraya, our university celebrates the confluence of two auspicious transitions: the arrival of its energetic new president and the 175th Anniversary

as art, drama, literature and foreign languages. Grouped together, these disciplines make up the humanities—academic areas of inquiry that scrutinize human culture, develop analytical thinking and encourage creative thought.

For 175 years, these programs of study have fashioned the commonwealth’s students into resourceful citizen leaders: deep thinkers and active members of the community who confront the challenges of the world with confidence and ingenuity. To rejoice in the history of the university is to rejoice in the value of the humanities.

In an increasingly commercialized environment that often understands higher education primarily in vocational terms, courses in philosophy, art or world literature are sometimes seen, at best, as marginally beneficial adventures to be paired with more practical, career-oriented courses. At worst, they are deemed extravagant and ultimately irrelevant detours that squander public funds. College students nationwide who specialize in the humanities, moreover, are occasionally stereotyped as hopelessly im-

practical, almost as if they plan to spend four years learning to hang glide. In learning to soar, the argument goes, students in the humanities neglect to be grounded. Or gainfully employed.

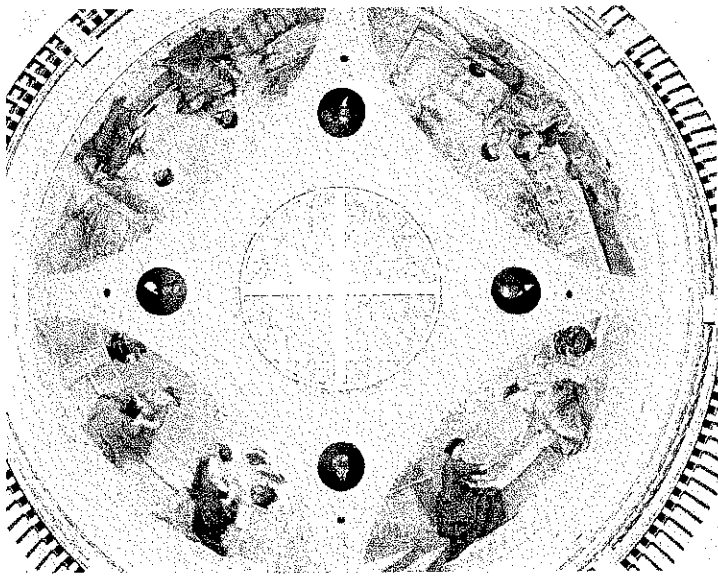
Such arguments fail to recognize how vital the humanities truly are to achieving everything a university education should make possible for our students, both as professionals and as human beings. A foundation in ethics, history, languages and the arts is what makes success in more specialized areas possible. Both parts of Madame Fraya’s advice hold

true: The humanities keep us rooted even as they allow us to be free. Because they support the foundations of an educated mind, they are utterly and ineluctably practical.

The accountant who serves diverse populations, the special education teacher who writes a grant proposal, the pharmacist who understands the health-related impacts of the historical tensions in her neighborhood—all profit from their undergraduate training in the humanities in a useful, realistic way. What’s more, when the accountant changes careers, when the teacher is promoted to principal, when the pharmacist buys her own drug store, these graduates will lean on the practical skills they developed in their humanities courses at Longwood—skills in writing, analysis, interpretation, communication and innovation. If the Longwood experience can be summarized as a mix of both caution and idealism, the sensible, cautious, ambitious student will choose the humanities every time.

In this year of transition, the university will return to its roots by commemorating—through a yearlong series of speakers, recitals, exhibitions and student/faculty panels—the foundational role the humanities have played in the remarkable history of the university. Beginning in early September and culminating in March, when Longwood hosts the Virginia Humanities Conference for the first time, “Humans Being” will explore the vitality of the humanities and their importance to the achievements of our students and alumni. Practically speaking, there may be no better way to celebrate the enduring legacy of the Longwood experience.

The 16th-century French humanist Michel de Montaigne, an ancestor of sorts to Madame Fraya, once wrote that “there is no knowledge so hard to acquire as the knowledge of how to live this life well.” As I reflect on all that our institution has become in 175 years, I think Montaigne would have been delighted to see what’s been accomplished at Longwood University, where generations of students have learned to live well by embracing an education that is at once practical, inspired and intrepid.



Eugene B. Monfalcone’s paintings in the dome of the Rotunda of Ruffner Hall depict the foundations of learning.

of its founding. To celebrate such good fortune, the Longwood community will naturally spend some time honoring our intellectual roots, reveling in our many successes and dreaming of what lies ahead. With a promising new leader and a long, fruitful history, there’s a lot of reveling to do and a lot of lucky stars to thank.

Any sober assessment of Longwood’s past, present and future necessarily begins with an appreciation for the value of the education offered here—an education steeped in the richness of history, philosophy and music, as well



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