continuing student housing registration. Over 1,500 continuing students have registered to reside in Longwood managed housing for the 2019-2020 academic year. Students planning to live off-campus with a private property owner utilized the Student Housing Gateway to participate in the online orientation to educate students on their rights and responsibilities as members of the Farmville community. The online off-campus intent form provided assessment data regarding the reasons students were choosing to move off-campus and collected the local address for each student. The assessment data will be utilized as a tool to help guide housing policies/enhancements for the future.

Student Engagement Unit

Citizen Leadership and Social Justice Education

Staff members continued to be very active in working with underrepresented students, both individually and collectively, regarding their feedback and needs related to their experiences at Longwood. Seventy-five workshops focused on diversity and inclusion during the past year to a wide variety of student groups and university offices. This included collaboration with the SGA to develop a proposal for an intercultural center at Longwood.

Important partnerships continue with Athletics, Human Resources, and with a number of academic departments. Close work and collaboration occurred with the Admissions office on the *Crash on Campus* program which hosted a record 150 admitted high school students on campus in April. Several interactive workshops were led by staff members and a large number of current underrepresented students were enthusiastically in attendance as hosts and participants.

Volunteer and community service continues to be important to many students. Specific examples include: Alternative Breaks trips to Saguaro National Park, Arizona, Puerto Rico and Portland, Oregon during spring break to perform environmental and social service relief and The Big Event in early April, organized and led by students, and in which over 250 students participated and 40 job sites in Farmville and Prince Edward County were served.

At the *Multicultural Gala and Donning of the Kente* ceremony on April 26, co-sponsored with the student NAACP chapter, 46 students were recognized for their personal success and contributions to enriching multicultural campus life.

Fraternity and Sorority Life (FSL)

"Step Up to Hazing", the online educational program, created collaboratively with staff from Athletics, Clubs and Organizations, Student Conduct and Integrity, Fraternity and Sorority Life, Health and Wellness, and the Dean of Students office was initially launched this spring to over 700 students. Fraternity and sorority members had a very impressive 98 percent completion rate. Student athletes will participate this summer.

The Greek Ambassadors peer educators provided five workshops during their first year to almost 70 students on the important topics of: hazing prevention; alcohol, tobacco, and other drugs; Title IX and healthy relationships; mental health awareness; and conflict resolution.

Overall, it was a very successful year for fraternities and sororities. Membership numbers remained relatively steady overall (with a small decrease for fraternities). The overall GPA remained higher than the all-campus average, and the groups continued to provide campus leadership in their community service and through strong individual leadership and academic accomplishment. The FSL staff continued to provide important foundational programs, including the Greek Leadership Summit, Greek Emerging Leaders Experience, and New Member Academy.

University Center and Student Activities

Use of the Upchurch University Center by students continues to grow, whether it is study groups making use of the meeting rooms, gathering to eat in the food court, playing pool or foosball in the downstairs lounge, hosting organizational meetings or events, or just hanging out alone or with friends. Upchurch also hosted recent events, including the VA Forum History Conference, the Big South Health Summit, the Alpha Chi Sigma Conclave, Boy Scouts' Merit Badge Day, and heavy use of the Soza Ballroom for a wide range of activities, including the Senior Toast. All of this reflects its true use as a center for University life.

Lancer Productions and WMLU planned and executed another successful Spring Weekend. The rainy weather did not prevent students from participating in the signature Oozeball and club and organization booths creatively hosted by 80 student groups, and to enjoy the bands on Friday and Saturday night featuring several national recording artists.

There were a record 159 Citizen Leader Award nominations; the selection committee awarded a record number of 58 students, faculty, and staff at an event in mid-April. At a reception and ceremony the following week, 54 juniors and seniors were awarded Joan of Arc Medallions recognizing their academic, extracurricular, and civic contributions.

Wellness Unit

The Health and Fitness Center again hosted the Relay for Life night on Friday March 22 and Saturday March 23, 2019. This year Longwood University had 786 registered participants and raised $92,394 for a new school record for this fundraising event.

In our first year in the Exercise is Medicine program, Longwood University was one of 139 colleges and universities across the country to be recognized and one of only 55 to be certified gold by the organization. Exercise is Medicine calls upon universities and colleges to promote physical activity as a vital sign of health and encourages faculty, staff and students to work together to improve the health and well-being of the campus community.

About Exercise Is Medicine: The American College of Sports Medicine (ACSM) co-launched Exercise is Medicine® (EIM) in 2007 with the American Medical Association. ACSM continues to manage the global health initiative, which seeks to make physical activity assessment and promotion a standard in clinical care, connecting health care with evidence-based physical activity resources for people everywhere of all abilities. EIM is committed to the belief that

physical activity promotes optimal health, is integral in the prevention and treatment of many medical conditions and should be regularly assessed and included as part of health care.

Campus Recreation and Intercollegiate Athletics just completed the first year of a partnership that funded an athletic trainer position between intercollegiate sports and sport clubs. Data is still being evaluated but the partnership was viewed as a very successful first year by both departments. This shared position allowed for extended coverage of the athletic training clinic for intercollegiate student-athletes and offered clinic hours to sport club student-athletes as well as athletic trainer coverage of the high contact sport club home events (football and rugby). The Longwood University sport club program has 22 clubs with over 400 unique student participants.

Longwood University Police Department (LUPD)

Operations

Operations Division of LUPD has implemented a Bicycle Patrol team to enhance visibility on campus. In addition officers have attended "Civil Disturbance" training with Virginia State Police in Amherst County. By the end of the year all LUPD officers will have had training involving civil disturbances response.

Administrative Services

During this quarter the office finalized the data transfer to the new Records Management Systems. The move of the LUPD communication effort to the Farmville Emergency Communication Center has gone extremely well.

Office of Emergency Management

Collaboration with FEMA continues regarding Hurricane Michael recovery. The 60-day damage inventory submittal was met for both the University and the Real Estate Foundation and we are in the next phase of the process which includes more detailed documentation of recovery efforts.

The Continuity of Operations Plan was updated and submitted to the Virginia Department of Emergency Management per Commonwealth of Virginia Executive Order No. 41.

Longwood University participated in the Statewide Tornado Drill in March with participation from many campus partners. Alert and notification systems were tested as well as evacuation capabilities to tornado shelter areas on campus. An After Action Report was completed, highlighting the successes as well as the lessons learned.

Office of Integrated Security Systems

Beginning in early February the University moved forward with the expansion of our video surveillance program and campus wide "Blue Phone" efforts. As of the end of April, 21 new cameras were installed at Longwood Village, and as of this report the blue phones were on track for installation by the end of May.

11

OPERATING BUDGET AND PLAN
FY 2019-2020

Development of Citizen Leaders

LONGWOOD
UNIVERSITY

TABLE OF CONTENTS

2019-2020 BUDGET SUMMARY

This section provides an overview of the University's FY 2020 operating budget. Detailed budget information is provided in the supporting tables. Highlights of the proposed plan are presented below.

- The budget is based on assumptions related to enrollment projections, actions taken by the General Assembly and Governor, revenue calculations and expenditure estimates. Revenue projections utilize historic revenue calculations, prior credit hour production and enrollment forecasts to estimate revenues.

- Continuing a commitment to being Virginia's leading public university when it comes to keeping college costs affordable for students and families, we were proud to freeze tuition rates for all students for the upcoming year. A modest increase in approved mandatory fees for full time undergraduates represents an average increase of $180 (1.35 percent) to their total tuition and fees. The University is also returning to a single semester rate, rather than a per-credit charge, for full time students taking between 12 and 18 credit hours per semester.

- In compliance with guidance set forth by the Governor and the General Assembly, room and board charges may be increased to cover changes in inflationary costs, debt service expenses, and costs associated with base salary and benefit increases.

- The projected revenue budget for FY 2020 is $132,816,826, which excludes $5,789,779 in state appropriation for student financial assistance. The proposed expenditure budget for the total University is $132,608,810, creating a surplus of $208,016 that will be held in a reserve for future use.

- The budget consists of two major components: the Educational and General Programs budget and the Auxiliary Services budget.

- The Educational and General Programs budget, which includes both general and non-general funding sources, is composed primarily of expenditures and revenues in the Instructional programs, as well as Sponsored Programs (grants and contracts). The total planned expenditures for FY 2020 are $72,737,459.

- In addition to the $1,046,659 allocated for salary increases in FY 2020, Longwood will contribute $93,000 to fund faculty promotions.

- Longwood will fund the Core Curriculum *CIVITAE* implementation cost for FY 2020 with $1,377,747, an increase of $488,839 over the prior year funding.

- The second major component of the University's total budget is Auxiliary Services, which includes activities such as student housing, dining services, parking and athletics. The proposed Auxiliary Services budget for FY 2020 is $58,871,351. A total of $208,016 will be held in a reserve for future use.

2019-2020 ACTIONS OF THE GENERAL ASSEMBLY

The General Assembly session began January 9, 2019, and ended on February 24, 2019. The General Assembly finalized a budget on February 24, 2019. After the General Assembly voted on the Governor's recommended changes to the budget on April 3, 2019, the Governor signed the budget on May 2, 2019.

Longwood's total Educational and General (E&G) operating appropriation will increase from $70,346,261 to $74,200,362 -- $31,108,303 GF and $43,092,059 NGF.

The budget would provide an additional $3,854,101 in FY 2020. Longwood's FY 2020 general fund operating base will increase by a net $2,925,851 (7.6%) from FY 2019. This is primarily due to additional funding for tuition moderation, additional degrees and operating maintenance, and salary increases. Longwood's FY 2020 non-general fund operating base increased $1,478,250. These changes will be reflected in our appropriation received from the state on July 1, 2019.

Financial Aid

General fund support for student financial assistance in FY 2020 will increase $744,282 to a total of $5,789,779.

Southside Virginia Regional Technology Consortium (SVRTC)

Funding remained at $108,905 for the SVRTC in FY 2020.

Salary Increases

Funding for salary increases is included in FY 2020 budget.

Higher Education Equipment Trust Fund

Funding for the FY 2020 Equipment Trust Fund (ETF) program of $743,433 general fund will be appropriated to Longwood. This is unchanged from the previous year.

Out-of-State Capital Fee

Out-of-state students are required to pay 100 percent of the average cost of their education. Additionally, non-resident students will pay $20 per credit hour as a mandatory capital fee. The amount of capital fees that will be paid by the University to support state capital project debt service on bonds issued under the 21st Century Program increased $8,238 from $97,911 to $106,149.

Capital Projects

The budget provides authorization of $2,163,000 in non-general funds for detailed planning for the Wygal Hall Replacement project. Longwood's Maintenance Reserve funding for FY 2020 is $1,878,865, the same as FY 2019.

2019-2020 EDUCATIONAL AND GENERAL PROGRAM PRIORITIES

The University's 2019-2020 Educational and General budget is based on priorities that support the strategic plan. After carefully examining the revenue projection for FY 2020, funds were allocated for strategic initiatives. The recommended expenditures include funds for the following:

• Merit based and compression related salary adjustments, funding for Faculty, A/P, Classified and Wage positions.	$ 1,046,659
• Core Curriculum *CIVITAE*	$ 1,377,747
• Increase Scholarships	$ 580,678
• Increase in Faculty Promotions	$ 93,000

2019-2020 AUXILIARY SERVICES PROGRAM PRIORITIES

The University's 2019-2020 Auxiliary Services budget is based on the program priorities listed below. Auxiliary activities are required to be self-supporting and must maintain sufficient fund balances for operations, renewal and equipment replacement and capital reserves. The Board approved housing and dining rate increases on December 1, 2018. Comprehensive fees were approved May 17, 2019.

Auxiliary Indirect Cost Rate

The Auxiliary Services operations are charged an indirect cost recovery rate for services provided by educational and general operations (such as payroll processing, purchasing, billing services, and facilities administration). The auxiliary cost study is submitted to SCHEV prior to the beginning of each biennium. The indirect cost rate for the 2018-2020 biennium is 14.19 percent. This is a .55 percent decrease from the prior biennium.

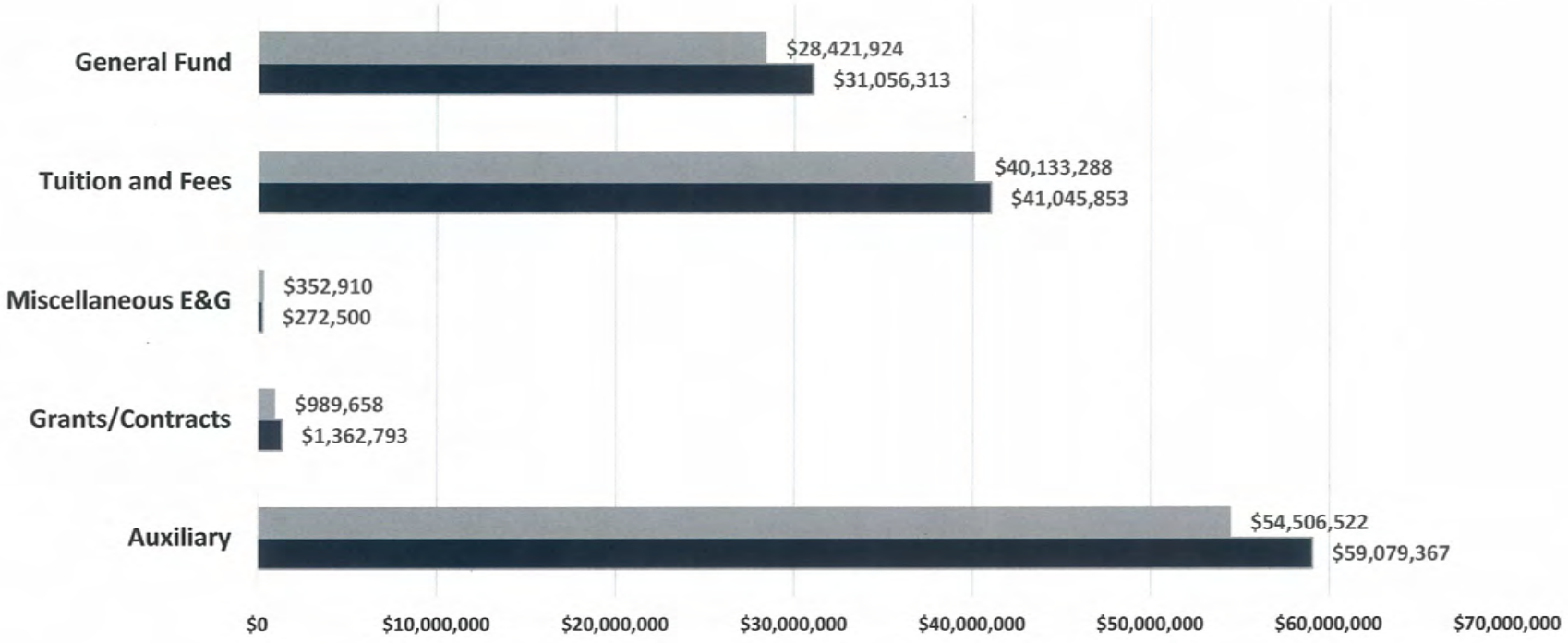
Housing & Dining

Combined, Housing and Dining are self-supporting operations and contribute to any needs in comprehensive fee budgets.

Comprehensive Fee Budgets

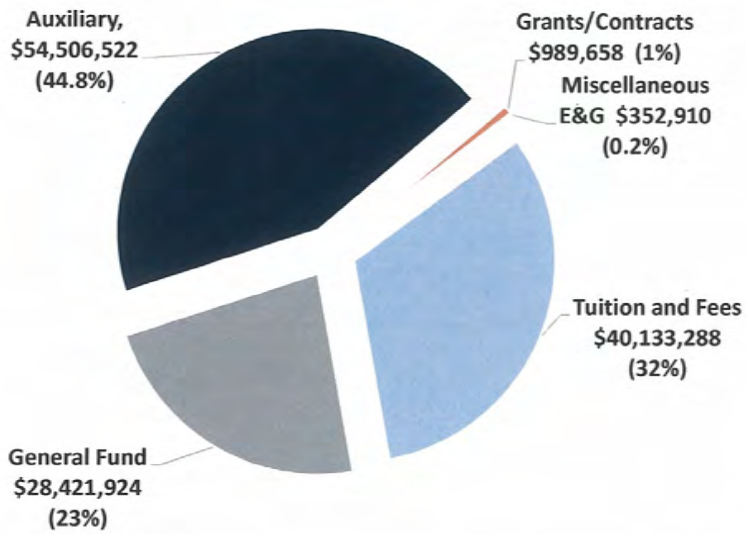
The comprehensive fee is used to support many auxiliary programs and services including: intercollegiate athletics, recreation and intramural programs, the student union, student health and wellness services, the Farmville Area Bus services, debt service, and repair and maintenance on non-general fund supported facilities.

Total Revenue

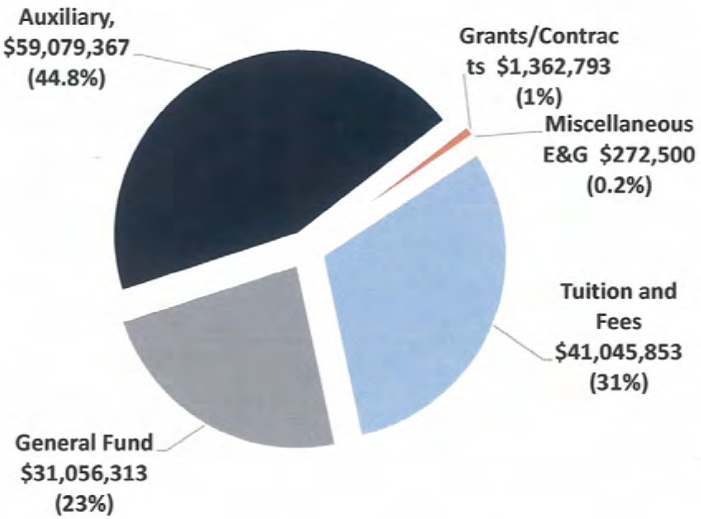


2018-19 Est. Revenue: $124,404,302 **2019-20 Revenue: $132,816,826**

Total Revenue Comparison by Category

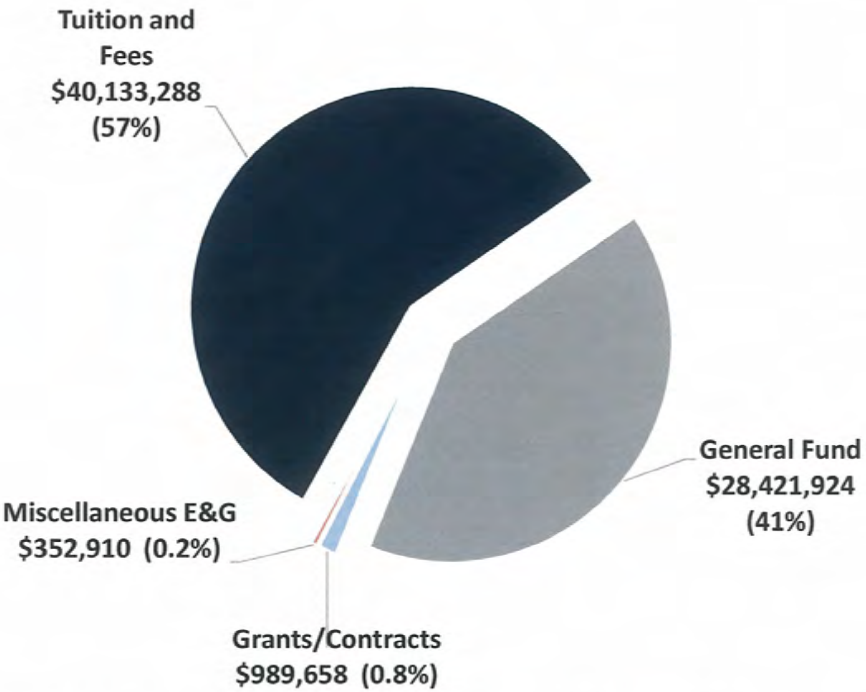


2018-19 Est. Revenue: $124,404,302

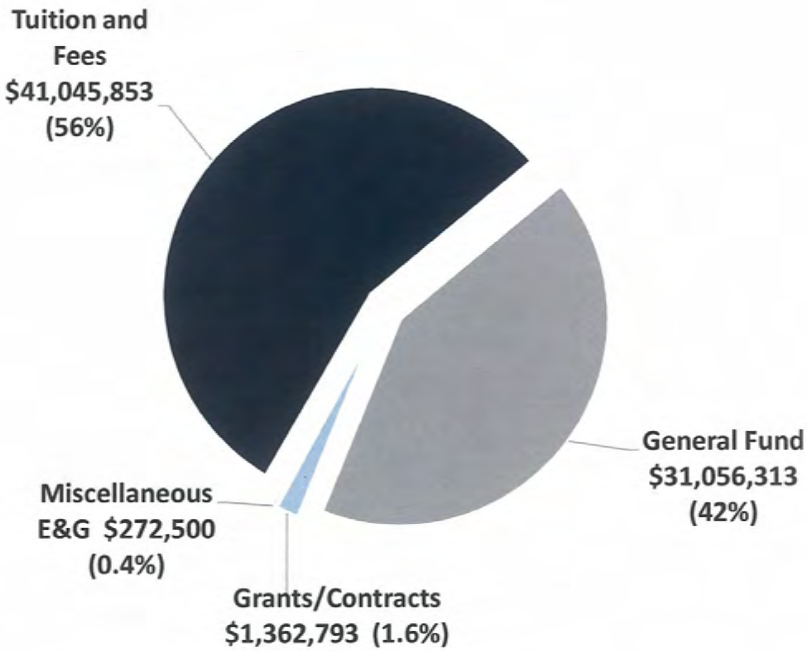


2019-20 Total Revenue: $132,816,826

E&G Revenue Comparison by Category

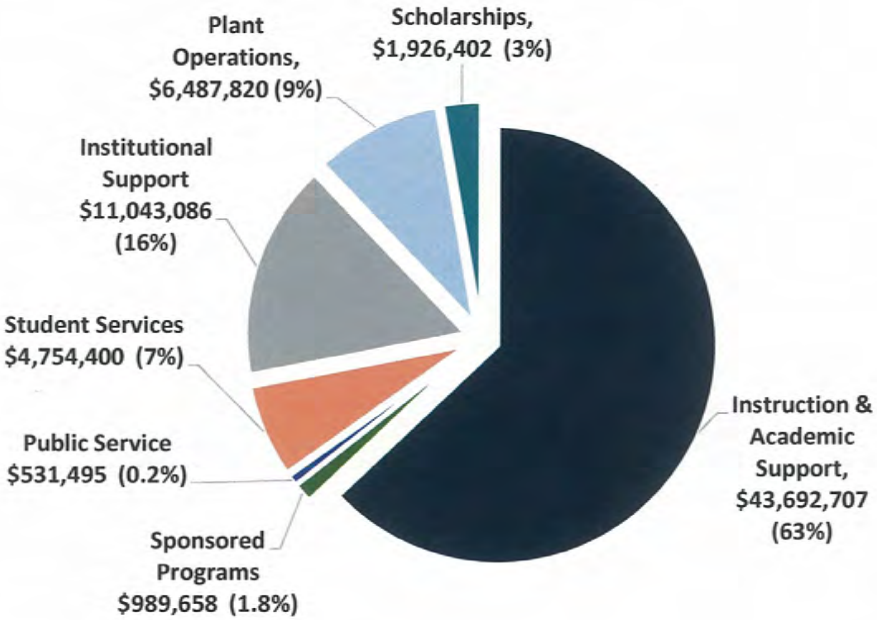


2018-19 Est. E&G Revenue: $69,897,780

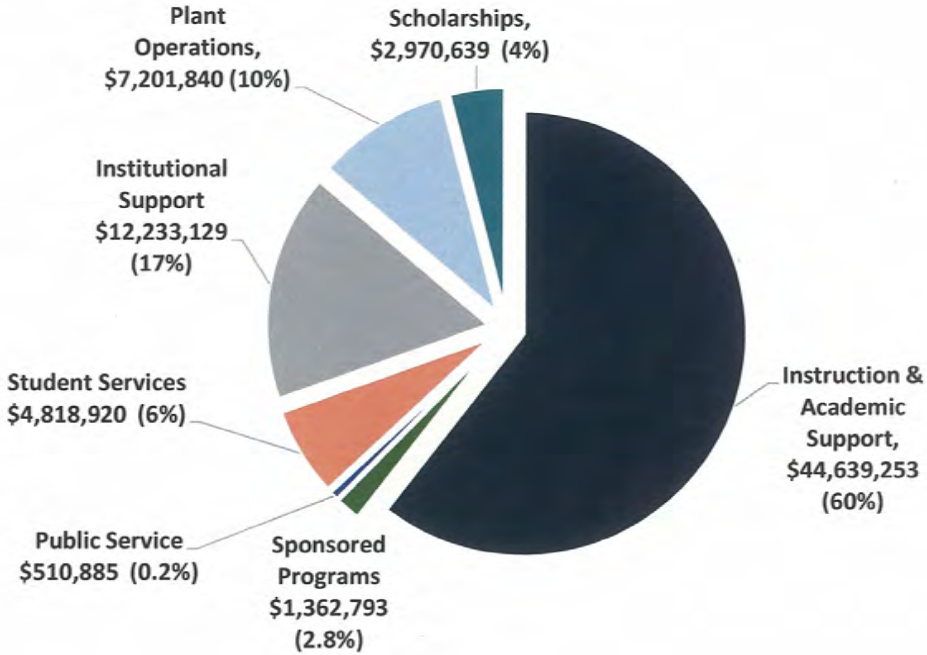


2019-20 E&G Revenue: $73,737,459

E&G Expenditure Comparison by Category

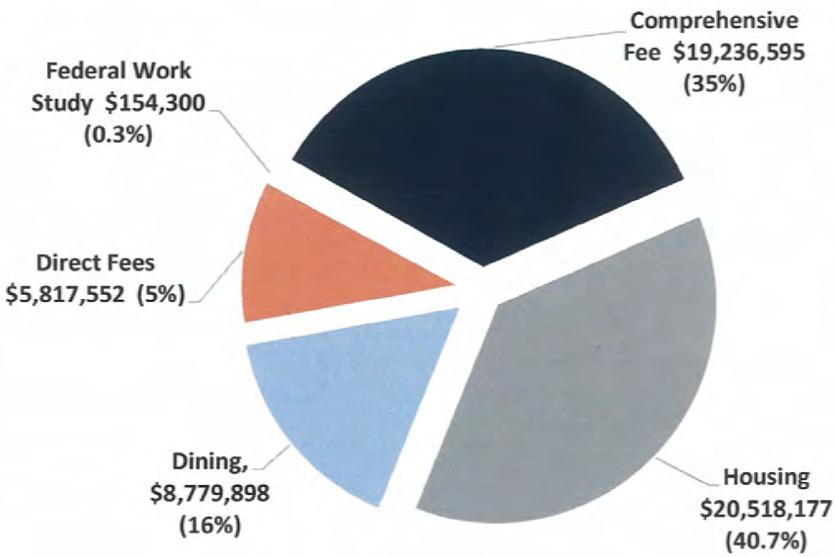


2018-19 Est. E&G Expenditures: $69,425,568

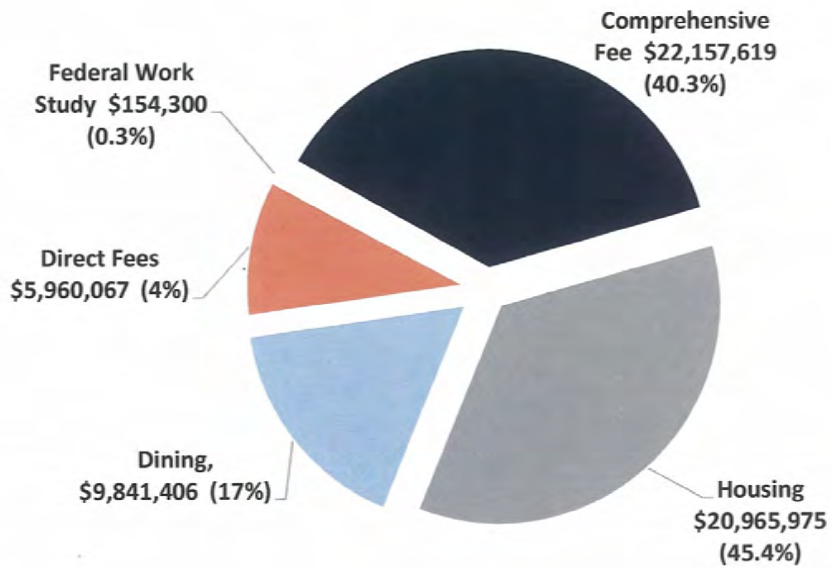


2019-20 E&G Expenditures: $73,737,459

Auxiliary Services Revenue Comparison by Category

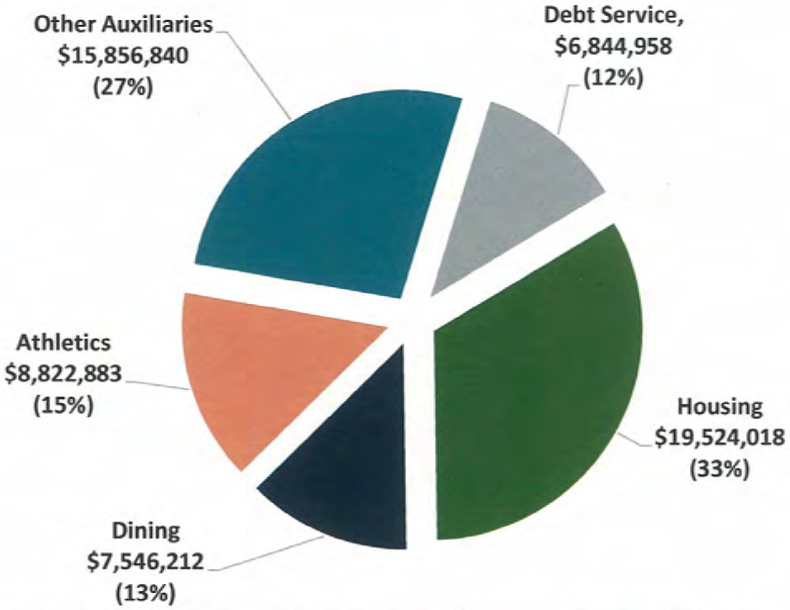


2018-19 Est. Auxiliary Revenue: $54,506,522

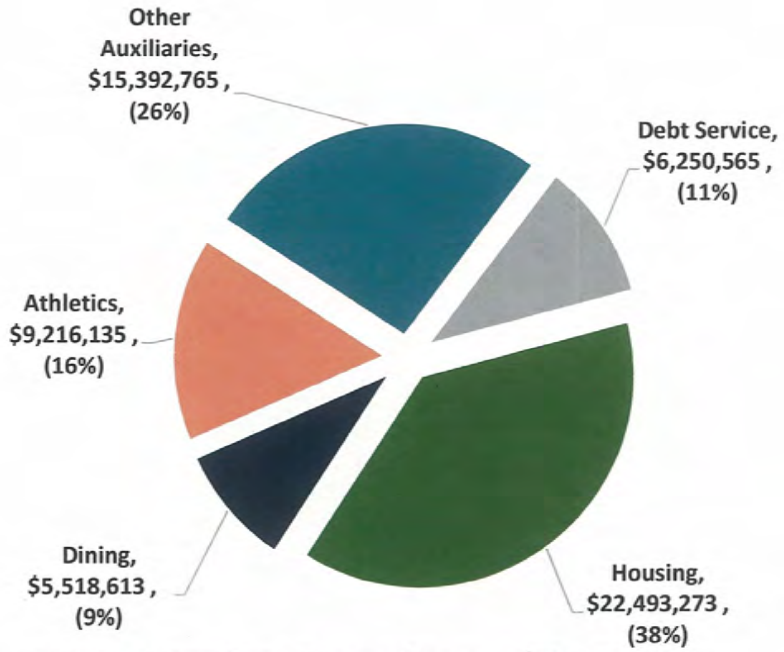


2019-20 Auxiliary Revenue: $59,079,367

Auxiliary Services Expenditure Comparison by Category



2018-19 Est. Auxiliary Expenditures: $58,594,911



2019-20 Auxiliary Expenditures: $58,871,351

TABLE 1
REVENUE SUMMARY

	Estimated 2018-2019	Proposed 2019-2020
EDUCATIONAL AND GENERAL		
Tuition and Fees	40,133,288	41,045,853
Commonwealth Appropriations *	28,421,924	31,056,313
Federal Grants and Contracts	828,827	1,101,408
State/Local/Private Grants and Contracts	160,831	261,385
Other Sources	352,910	272,500
Total Educational and General	69,897,780	73,737,459
AUXILIARY ENTERPRISES		
Total Auxiliary Enterprises	54,506,522	59,079,367
INSTITUTIONAL TOTAL	124,404,302	132,816,826

*Appropriation excludes Higher Education Student Financial Assistance of $5,045,497 in FY 2019 and $5,789,779 in FY 2020.

TABLE 2
EXPENDITURE SUMMARY

	Estimated 2018-2019	Proposed 2019-2020
EDUCATION AND GENERAL		
Instruction	36,103,396	37,265,918
Sponsored Programs	989,658	1,362,793
Public Service	531,495	510,885
Academic Support	7,589,311	7,373,335
Student Services	4,754,400	4,818,920
Institutional Support	11,043,086	12,233,129
Plant Operation & Maintenance	6,487,820	7,201,840
Scholarships & Fellowships [1]	1,926,402	2,970,639
Total E&G Expenditures	69,425,568	73,737,459
AUXILIARY ENTERPRISES		
Housing Services	19,524,018	22,493,273
Dining Services	7,546,212	5,518,613
Athletics	8,822,883	9,216,135
Other Services	15,856,840	15,392,765
Transfers Debt Service (Mandatory)	6,844,958	6,250,565
Total Auxiliary Enterprises	58,594,911	58,871,351
INSTITUTIONAL TOTAL	128,020,479	132,608,810

[1] FY 2019 and FY 2020 exclude $5,045,497 and $5,789,779 respectively in Higher Education Financial Assistance from State Appropriations

Budget Allocation Ratio

Fiscal Year	2017	2018	2019	2020
Instruction and Academic Support	62.02%	61.86%	62.47%	60.54%
Public Service	0 .73%	0.72%	0.77%	0.69%
Student Services	6.81%	6.54%	6.81%	6.54%
Institutional Support	14.63%	15.61%	16.05%	16.59%
Operation and Maintenance of Plant	10.57%	10.74%	9.80%	9.77%
Student Aid	3.41%	3.29%	2.72%	4.03%
Sponsored Programs	1.83%	1.24%	1.38%	1.85%

Formula

$$\frac{\text{Expenditure Budget (by function)}}{\text{Total Educational \& General Expenditure Budget}}$$

Significance of Ratio

This ratio reflects the amount of expenditures, by function, as a percentage of total educational and general expenditures and mandatory transfers. Major shifts in the various percentages may reflect a change in funding priorities.

Longwood University's Current Status

The allocation ratios for Longwood University show shifts over the last four years. The following contributed to changes in expenditure budgets:

- Instruction and Academic Support ratio decreased primarily due to a redistribution of funding to Institutional Support and Operation and Maintenance of Plant. Additional funds were added to support Core Curriculum, faculty positions and salary increases.
- Student Services decreased over the previous year due to changes in positions in the ESL/English Bridge program.
- Institutional Support increased primarily as a result of a redistribution of operating funding and salary and benefit increases.
- Operation and Maintenance of Plant increased due to a redistribution of operating funding
- Student Aid funding increased due to $380,678 in scholarships being funded in FY20 by Longwood.
- Sponsored Programs increase is primarily due to more federal grants.

Instructional Budget per Student FTE

Significance of Indicator

This indicator reflects the amount of funds expended for Instruction and Academic Support per each full-time equivalent student.

A dramatic change in the ratio signals a shift in the funding priorities of the institution. A significant change also can accompany an enrollment increase or decline.

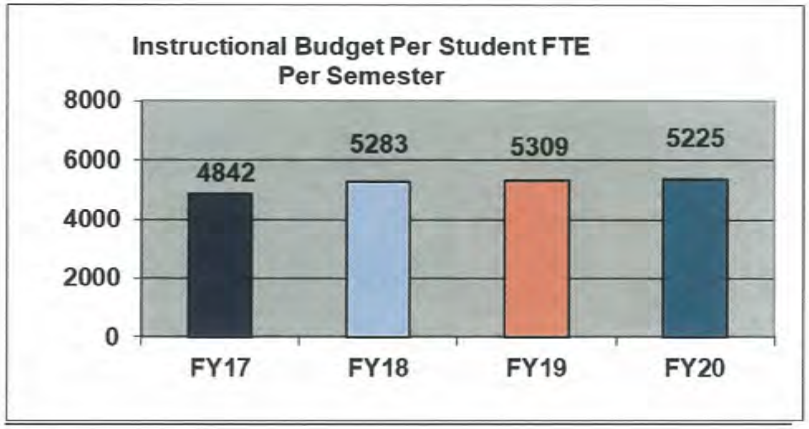
Longwood University's Current Status

In FY 2018 the increase is primarily due to additional funding for core curriculum and salary increases.

In FY19 the increase is primarily for additional funding for core curriculum *CIVITAE* and merit based and compression related salary adjustments.

In FY20 the decrease is primarily for a projected decrease in student FTE.

The total annual Educational & General budget per in-state FTE is $15,448 which is a decrease of $175 compared to the previous year. This excludes the amount budgeted for Sponsored Programs and State Higher Education Financial Aid.



Source: SCHEV 2B Enrollment Projections – Fall and Spring Semesters (On and Off Campus)

Formula: $\frac{\text{Instruction and Academic Support Budgets}}{\text{Fall and Spring Enrollment Projections}}$

Debt Burden Ratio

Significance of Ratio

The debt burden ratio examines the University's dependence upon borrowed funds as a means of financing its mission. It compares the level of debt service with the institution's budgeted expenditures.

Formula:

$$\frac{\textbf{Debt Service}}{\textbf{Total Expenditure Budget}}$$

A level trend or a decreasing ratio over time indicates that debt service has sufficient coverage without impinging further on other functional areas. The standard for higher education is a maximum of 7 percent, meaning that current principal and interest expense should not be greater than 7 percent of the total budget.

Although the 7 percent level is an acceptable threshold, this percentage can range between 5 percent and 10 percent. The actual percentage will vary based upon the financial strength of the institution. Institutions with greater flexibility in allocating funds will be able to take on additional debt. Longwood participates in the state bond program which is based on fixed rates. Debt is not increased without budgeting an increase in funds available to pay the financial obligations.

In March 2007, the Board of Visitors approved an institutional debt ratio of up to 9 percent to facilitate the completion of nongeneral fund projects approved by the General Assembly.

Longwood University's Current Status

Longwood's Debt Service to Total Budgeted Expenditures is 4.76 percent for FY 2020. This calculation is based on scheduled debt payments for FY 2020 and total budgeted expenditures less reserves.

The actual audited debt burden ratio per unaudited financial statements in FY 2018 was 4.91 perccent.

GLOSSARY

Academic Support: Includes activities conducted to provide support services to the institution's three primary programs: instruction, research and public service. Examples include the library, deans, academic technology, academic service center and disability resources.

Appropriation: An expenditure authorization with specific limitations as to amount, purpose, and time; formal advance approval of an expenditure from designated resources available or estimated to be available.

Auxiliary Services: Activities within the University that exist to furnish goods or services directly or indirectly to students, faculty and staff. These activities charge fees directly related to, but not necessarily equal to, the cost of the service. Auxiliary services must be self-supporting.

Banner: Longwood's administrative information system that integrates Finance, Student and Human Resources modules within a single enterprise system.

Direct Sales (Auxiliary): Sales of auxiliary services, to include facility rental, bookstore income, parking decals/fines and recreation center memberships.

Educational & General (E&G): Term used to describe all operations related to the institution's educational objectives.

Full-Time Equivalent (FTE): A means for expressing part-time students or faculty as a full-time unit. The formula is generally based on credit hours. Example: An institution may define full-time as being twelve credit hours, so a student (or faculty member) taking (or teaching) three credit hours would then equal .25 FTE.

General Funds: Revenue received from the State from the collection of taxes, fees and other charges.

Grants and Contracts (Sponsored Programs): Sponsored program funds are generated through a grant or contractual agreement. Funds may be provided by state, federal, local or private entities. Sponsored program funds must be expended for the purposes outlined in the respective grant/agreement.

Indirect Costs: Fee charged to grants or contracts to pay for the use of University facilities, i.e., overhead.

Institutional Support: Activities whose primary purpose is to provide operational support for the day-to-day functioning of the institution, excluding physical plant operations. Examples include the President, Vice-Presidents, institutional research and assessment, administrative technology, public relations, financial operations, internal audit, human resources, and safety and security.

Instruction: Includes all activities that are part of the institution's instructional program, primarily all academic departmental operations.

Mandatory Transfers: Transfers arising out of (1) binding legal agreements related to the financing of the educational plant, such as amount for debt retirement, interest and required provisions for renewals and replacements of plant, not financed from other sources, and (2) grant agreements with agencies of the federal government, donors, and other organizations to match gifts and grants to loan funds and other funds.

Miscellaneous E&G Revenues: Includes nongeneral fund revenues derived from the sale of goods or services that are incidental to the conduct of instruction, research or public service. Examples include revenues from facility rentals, payment plan fees, administrative fees and indirect costs.

Nongeneral Funds: Tuition, fees, and all other funds not received from the State. This includes grants and contracts income.

Nonmandatory Transfers: These transfers serve a variety of objectives such as moving monies generated in auxiliary enterprise fund groups to an E&G fund group or to a capital outlay fund group for use in providing project funding.

Operation and Maintenance of Plant: This category includes the operation and maintenance of the physical plant. It includes all operations established to provide services and maintenance related to campus grounds and facilities. It also includes utilities, insurance, facilities management, custodial services, sustainability and power plant operations.

Public Service: Includes all funds expended for those noninstructional services established and maintained to provide services to the general community or special sectors within the community. Community service is concerned with making available to the public various resources and unique capabilities that exist within the institution. The Longwood Small Business Development Center is included in this category.

Restructuring: Legislation that allows institutions of higher education varying levels of decentralization in the areas of procurement, personnel and capital outlay while establishing commitments and performance measures for the institutions.

Student Fees (Auxiliary): Student dining, housing and comprehensive fees.

Student Services: Those activities whose primary purpose is to contribute to students' emotional and physical well-being and to their intellectual, cultural and social development outside the context of the formal instruction program. Examples include academic and career advising, admissions, registration, financial aid and student success.

Tuition and Fees: Nongeneral funds that include all tuition and fees assessed against students for current operating purposes. Fees include application fees, registration fees, course fees and on-line fees.

May 15, 2019

CAPITAL BUDGET

Components of the Budget

Longwood University's capital program is based on the 2025 University Master Plan – *Place Matters*, along with multi-year capital plans, facilities condition assessments, and annual reviews of deferred maintenance priorities. Subsequently, project plans and budgets are developed based upon estimates of the resources required to complete specific projects envisioned in the plans. The Commonwealth of Virginia categorizes projects costing less than $25,000 as routine maintenance; projects between $25,000 and $3 million as capital improvement or maintenance projects; and projects of more than $3 million as capital outlay projects.

As defined by the Commonwealth of Virginia, capital outlay projects typically include

- The acquisition of real property
- New construction projects with a total project cost exceeding $3.0 million
- Improvements, renovations, repairs, replacement, equipment, maintenance, or combination projects for a single building with a total project cost exceeding $3.0 million
- Umbrella or blanket projects that encompass multiple similar smaller projects in more than one facility or the purchase of multiple pieces of property, where the total cost exceeds $3.0 million

Capital outlay projects require the specific approval and appropriation of funds by the General Assembly, regardless of the source of funding. Since Fiscal Year 2015, requests for capital outlay appropriations have been accepted on an annual basis, rather than a biennial basis.

Capital outlay projects costing more than $3 million require General Assembly authorization and appropriation, but projects that fall between $25,000 and $3.0 million do not. These projects typically include

- Modifications to facilities, grounds, and infrastructure to improve programmatic effectiveness and aesthetics as well as operating and energy efficiencies
- Planned replacement or maintenance of building and infrastructure components
- Maintenance to building and infrastructure components that has been deferred due to shortfalls in normal Operations and Maintenance (O&M) resources

Funding

Capital Outlay Projects

The Commonwealth of Virginia funds General Fund capital outlay projects through a funding pool process. Rather than funding projects individually, they are included in pools of funds provided for various stages of capital development across the Commonwealth. Project costs are reviewed at various stages of design and development. The actual project budget and funding level is set at the end of detailed planning, prior to the development of the construction or working drawings.

Agencies may also fund capital outlay projects with Non General Funds (also known as Auxiliary Funds), which are funds from non-tax sources, such as user fees, grants, donations, or bond sales. These funds are used to support specific operations such as dining, housing, parking, and athletics, or for other non-general fund purposes. General funds may not be used to support Auxiliary operations or projects, so agencies establish specific Auxiliary Reserves for each type of operation.

Deferred Maintenance (Maintenance Reserve) Projects

The Commonwealth of Virginia provides funding to address deferred maintenance (Maintenance Reserve) on facilities and infrastructure supported by Educational & General (E&G) funds (a combination of General Funds and tuition). Biennially, the General Assembly appropriates a blanket amount to each agency to fund their deferred maintenance requirements for E&G facilities. Agencies may fund deferred maintenance projects on Auxiliary facilities with Auxiliary funds.

As of Fiscal Year 2015, deferred maintenance projects funded by the Commonwealth of Virginia Deferred Maintenance Program no longer require Department of Planning and Budget approval.

Non-Capital Outlay Projects

Depending on a project's cost and scope, agencies may fund capital outlay projects with operating funds. Typically, GF projects will be limited to one fiscal year since those funds may revert to the Commonwealth of Virginia's general fund at the end of the fiscal year. NGF projects may be funded either from O&M funds or from reserves. Reserve funded projects can cross fiscal years. Projects funded through the Real Estate Foundation (REF) are typically supported through operating leases and management agreements funded by annual operating funds.

Project Activity

Active Projects

Longwood's capital outlay projects total approximately $125.4 million, which is comprised of about $122.5 million in fully funded GF projects and $2.9 million in NGF projects. FY19 active capital improvement and maintenance projects total approximately $534,000, which is comprised of about $515,000 in GF funds and $20,000 in NGF funds.

Capital Outlay Projects

Project Title	General Fund	Non-General Fund	Total Project Cost
Fully Funded			
Asbestos Abatement	$2,332,000	$0	$2,332,000
Construct Admissions Office	$11,651,715	$0	$11,651,715
Construct New Academic Building	$22,713,000	$0	$22,713,000
Replace Wheeler Mall Steam Distribution System	$5,089,920	$2,863,080	$7,953,000
Pool Funded (Estimates Only)			
Renovate and Expand Facilities Annex Building	$15,752,000	$0	$15,752,000
Construct Wygal Hall Replacement	$64,951,000	$0	$64,951,000
Total	**$122,489,635**	**$2,863,080**	**$125,352,715**

Maintenance Reserve Projects

FY 19 Maintenance Reserve Projects (active)

Project Title	General Funds	Non-General Funds	Total Project Cost
Lancaster and Ruffner Interior Improvements Study	$0	$11,508	$11,508
Blackwell Central Chiller Plant Cooling Tower Repairs	$27,123	$8,102	$35,225
Bedford Chiller Replacement (Design Only)	$18,312	$0	$18,312
Chichester Lab Fume Hood Controls Replacement (Design Only)	$36,010	$0	$36,010
Chichester RTU Curb Replacement (Design Only)	$20,986	$0	$20,986
Coyner and Hiner Chiller Replacement (Design Only)	$19,977	$0	$19,977
Greenwood Library AHU #3 Replacement (Design Only)	$28,467	$0	$28,467
Greenwood Library Fire Alarm Replacement (Design Only)	$31,987	$0	$31,987
Hull Fire Alarm Replacement (Design Only)	$26,213	$0	$26,213
New Heating Plant Ash Conveyor #2 Replacement	$31,524	$0	$31,524
New Heating Plant Bucket Elevator Chain Replacement	$22,400	$0	$22,400
New Heating Plant Electrical Main Disconnect Replacement	$49,802	$0	$49,802
New Heating Plant Screw Conveyor #2 Replacement	$84,291	$0	$84,291
Iler Hall HVAC Upgrade (Design Only)	$12,060	$0	$12,060
Lancaster Hall Elevator Replacement (Design Only)	$17,370	$0	$17,370
Lancaster Hall HVAC Controls Upgrade (Design Only)	$12,432	$0	$12,432
L&G Building Heating System Replacement (Design Only)	$35,358	$0	$35,358
Replace Steam Tunnel Top and Sidewalk Spruce St. (Design Only)	$40,055	$0	$40,055
Total	**$514,667**	**$19,610**	**$533,977**

Planned Projects

Capital Outlay Projects

During its 2020 session, the Virginia General Assembly will create the commonwealth's budget for the 2020-2020 biennium. State agencies will submit their requests for capital project approval and funding to the Virginia Department of Planning and Budget (DPB) in summer 2019. In accordance with instructions received from DPB, Longwood will submit one or more capital project requests, which will be based on the 2025 University Master Plan – *Place Matters*

Maintenance Reserve Projects

Maintenance Reserve projects are identified both from facilities assessments and the emergence of unforeseen conditions. There are a number of these projects that need to be addressed over the next several years.

The General Assembly typically has appropriated approximately $1.3 million per year to Longwood in Maintenance Reserve funds. This appropriation increased to approximately $1.9 million in the FY 19 budget and $1.9 million in the FY 20 budget.

FY 20 – FY 21 Potential Maintenance Reserve Projects

Potential Projects	General Fund	Non-General Fund	Total
FY 20 Projects			
Project Design			
Replace Heat Pumps Hardy House	$30,000	$0	$30,000
Replace Chiller Hull	$40,000	$0	$40,000
Replace Chiller Lancaster	$40,000	$0	$40,000
Replace Roof Lancaster	$30,000	$0	$30,000
Replace Cooling Tower Blackwell	$40,000	$0	$40,000
Replace Elevator #1 Greenwood Library	$45,000	$0	$45,000
Replace Controls Blackwell Central Chiller Plant	$40,000	$0	$40,000
Construction			
Replace Elevator Lancaster	$130,000	$0	$130,000
Replace Curbs Around Air Handling Units Chichester Science Center	$150,000	$0	$150,000
Repair Blackwell Chiller	$100,000	$0	$100,000
Replace HVAC Controls Lancaster	$93,700	$0	$93,700
Replace AHU Valves Lancaster	$35,000	$0	$35,000
Replace Chiller Compressor Hull	$30,000	$0	$30,000
Replace Multiple Heat Pumps (507 and 509 Pine St., Bristow, and Grainger	$97,000	$0	$97,000
Replace Heat Pump Iler Second Floor	$55,000	$0	$55,000
Replace Vibrating Conveyors New Heating Plant	$80,000	$0	$80,000
Replace Twin Infeed Augers New Heating Plant	$60,000	$0	$60,000

Replace Single Infeed Auger New Heating Plant	$30,000	$0	$30,000
Replace Heating System Landscaping and Grounds Management Building	$75,000	$0	$75,000
Replace Greenwood Library Basement Archives HVAC System	$150,000	$0	$150,000
Replace Fire Alarm Greenwood Library	$210,000	$0	$210,000
Replace Fire Alarm Hull	$140,000	$0	$140,000
Replace Heat Pumps Hardy House	$60,000	$0	$60,000
Repair Campus Sidewalks and Hardscape	$50,000	$0	$50,000
FY 20 Total	**$1,810,700**	**$0**	**$1,810,700**
FY 21 Projects			
Project Design			
Design for FY 22 Projects	$300,000	$0	$300,000
Construction			
Repair Interior Plaster Hardy House	$130,000	$0	$130,000
Repair Controls Blackwell Central Chiller Plant	$100,000	$0	$100,000
Replace HVAC Controls Hull Phase II	$85,000	$0	$85,000
Replace Chiller Hull	$350,000	$0	$350,000
Replace Chiller Lancaster	$350,000	$0	$350,000
Replace Roof Lancaster	$110,000	$0	$110,000
Replace Cooling Tower Blackwell	$150,000	$0	$150,000
Replace Elevator #1 Greenwood Library	$150,000	$0	$150,000
Repair Campus Sidewalks and Hardscapes	$50,000	$0	$50,000
FY 21 Total	**$1,775,000**	**$0**	**$1,775,000**

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Strategic Planning

The Board of Visitors and University have been engaged in dialogue and discussion over 2018-19 regarding Longwood's strategic direction. On campus, the University Planning Council --- a cross-institution body that meets regularly each year --- has been a forum for deliberations. Over the spring, President Reveley likewise convened several campus open forums for input and ideas. The Cabinet has also been instrumentally involved.

The draft strategic plan included here reflects a distillation of these deliberations. In keeping with best practice at Longwood and elsewhere, the draft plan is deliberately one-page. It is intended to be nimble and to allow for dynamic action and innovation, appropriate to an uncertain time nationally and in higher education. But it also speaks to the timeless qualities of Longwood.

In addition to the draft strategic plan, included here as well for reference is the March 2019 report to the BOV on the University's prior strategic plan, which ran through 2018. This report served as a useful document to the University Planning Council in its thinking and to others across campus.

****MAY 2019 --- DRAFT FOR BOARD OF VISITORS DELIBERATION****

LONGWOOD UNIVERSITY

FOREFRONT FOR THE COMMONWEALTH
Strategic Plan 2019-2025

Our 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.*

Our Opportunity:

In a Turbulent Time, a Thriving Institution – American democracy and American higher education are in a time of division and uncertainty, but Longwood can accelerate and thrive, proving the power of residential, citizenship-focused university education

Our Key Principles:

Academic Enterprise at the Heart – as one of the hundred-oldest U.S. colleges and universities and Virginia's third-oldest public university, we prize faculty engagement with students, our residential character, research and scholarship, and the role of a broader learning community beyond the classroom in preparing citizen leaders committed to the common good in our pluralistic democracy

Transforming Lives – we are at our best when helping to transform lives, by connecting students with people and experiences that broaden their minds, challenge them, and equip them with strong career skills; to succeed we must also help keep college affordable, provide a campus culture that fosters well-being, and be mindful of Longwood's role as a steward in our region of the Commonwealth

Camaraderie – enriched by our many traditions, including our honor code, and commitment to diversity of backgrounds, identities, and intellectual perspectives, we enjoy a distinctive camaraderie, which is fueled by our belief that individuals can make a difference, here on campus and beyond; cultivating this camaraderie gives real strength for collaborating and working together in challenging times

Our Priorities:

Intensifying Enthusiasm across All Enrollment – the University will thrive if students and prospective students at all levels cherish the chance to attend Longwood; academic rigor is fundamentally part of cultivating this enthusiasm, as is affordability via scholarships

Innovation in What We Offer – inspired by Civitae, we can innovate in our major, graduate, co-curricular, and student-employment offerings, enhancing career skills by drawing on strengths like Hull Springs, the LCVA, Moton, Study Abroad, and the Brock Experiences

Reflecting the Diversity of America – strong commitment to diversity of backgrounds, identities, and intellectual perspectives is crucial for our success pedagogically and civically, as is focus on faculty and staff recruitment and retention, including competitive compensation

Distinction in the Commonwealth and the Nation – communicating Longwood's successes and strengths, qualitative and quantitative, will make one of the fifty-oldest NCAA Division I schools into the household name in Virginia and beyond that it should be

A Sense of Beauty and Place on Campus – with its historic sense of place and its accessibility, our campus can serve as a sanctuary of natural and architectural beauty fostering physical and mental well-being; sustainable practices are powerfully important in this regard

College-Town Vibrancy – Farmville, Prince Edward, the surrounding region, H-SC, and Longwood stand together where the Civil War ended and Civil Rights began, as America's first two-college community; our college-town vibrancy is resurgent and crucial

A Culture of Philanthropy – with the Commonwealth as a vital support and catalyst always, it is also of paramount importance for Longwood to build a true culture of philanthropy, among alumni and friends as well as on campus in spirit, budget and procedure

Measuring Progress:

Each part of the University will determine how best to assess progress against these priorities in its own area; here are metrics Longwood will measure as barometers reflecting institution-wide progress, assessed to inform decision-making and budgeting:

- Enrollment for Undergraduates, "4+1" and Graduate Students
- Retention and Graduation Rates
- Composition of Student Body, Faculty, Staff, Boards and Volunteer Leadership
- Purchase Volume of University Licensed Logos and Marks
- Overall Attendance at University Events (Performances, Athletics, Exhibits, Lectures, etc.)
- Total Population of the Local Community
- Alumni Annual Giving Percentage

LOOKING TO OUR THIRD CENTURY
-Strategy and Progress 2013 through 2018-

Report to BOV
March 2019

In 2013, President Reveley began in-depth discussions about the strategic direction of the University at the Board of Visitors meeting held two weeks after he took office in June, following an intensive and involved transition period since his appointment that March. It was already clear in 2013 that American higher education was in a turbulent period, but certainly not yet clear the extent to which America itself was on the cusp of a time of harsh divisiveness and unease.

Arguably, strategy is always most effective when it is concise and nimble --- perhaps that is even especially true in unsettled times. Board members were committed to capturing the direction for Longwood in a one-page strategic plan.

The simplicity of that approach fostered rich dialogue with the BOV and deliberation with constituencies across campus and throughout the Longwood community, building on thought given to academic strategy since 2011-12 and prior initiatives such as the 2012-13 Compensation Task Force. By the end of the fall semester of 2013-14, consensus was forming around key principles and strategic priorities. And through inclusive continuing dialogue, by the end of 2013-14 the BOV had endorsed a polished one-page plan, formally adopting it in September 2014.

The Strategic Priorities became catalysts for action: Retention & Graduation; Renewing General Education; National Marketing; Foot Traffic by Alumni & Friends; Regional Prosperity; Strengthening the University Community; and Organization, Structuring, and Governance.

Two early fruits of the plan quickly began to provide for continuous assessment of progress and feedback into budgeting. First, keeping with its pattern of strategic deliberation over 2013-14, in 2014-15 the BOV adopted a meeting format that accentuates deliberation and discussion --- as distinct from reiteration of dry reports. Second, also in 2014-15 the University Planning Council acted to expand its structure and scope to become a deliberative body representative of the entire campus community and focused on the range of matters bearing on the entire University. Beginning in the fall of 2015-16 the UPC began the practice of giving special focus at each of its three annual meetings to a specific strategic priority or related issue, allowing for in-depth discussion and review. It is also notable that the President's Cabinet, which meets and deliberates weekly, enjoyed the momentum of continuity in key positions from 2013 through 2018, and eventual transitions were filled by longtime members of the University community, such as Courtney Hodges, Larissa Smith Fergeson, and Louise Waller.

The original planning horizon of 2018 coincided with President Reveley's first term. As the University now looks ahead and contemplates strategy over the next horizon, this report is an overview of progress and challenges since 2013. The University is energized and prospering despite the turbulence in higher education and across America, and in that regard Longwood's strategy for the future can amplify what has driven this success.

Retention & Graduation

As is true of state budgets nationwide, in this century as compared to the last the Commonwealth of Virginia's budget for higher education faces acute pressures. The Commonwealth will always continue to

be a powerful and vital source of strength for public higher education, but enrollment strength is crucial to the vibrancy of public institutions now more than ever.

There are headwinds. In keeping with broader national demographic trends, total enrollment in Virginia public universities has plateaued since 2012. From 2012 through 2018, total enrollment in Virginia's 15 four-year public institutions increased by 2.6%, from 214,640 to 220,255. In contrast, over the immediate prior six years from 2006 to 2012, it had increased instead by 6.1%, from 202,183 to 214,640 --- which is to say the rate of growth fell by more than half beginning in 2012. The demographic boom of the 1980's, 1990's, and 2000's has ended, and the country as a whole is facing the first extended period in its history when the college-going population is not undergoing substantial growth.

Most of Virginia's 15 four-year public institutions lost enrollment from fall 2012 --- the fall prior to President Reveley's appointment in March 2013 --- through fall 2018, some severely. Longwood is among those that have grown, if slightly.

Enrollment Change in Commonwealth 2012-13 to 2018-19

15 Four-Year VA Publics	Fall 2012-13	Fall 2018-19	Change
George Mason	32,961	37,677	14.3%
Virginia Tech	31,087	34,850	12.1%
James Madison	19,927	21,751	9.2%
William & Mary	8,258	8,817	6.8%
UVA	23,907	24,639	3.1%
Longwood	4,834	4,911	1.6%
VMI	1,664	1,685	1.3%
Old Dominion	24,670	24,176	-2.0%
VCU	31,752	31,076	-2.1%
Radford	9,573	9,335	-2.5%
Christopher Newport	5,186	4,957	-4.4%
Mary Washington	5,093	4,727	-7.2%
Wise	2,420	2,065	-14.7%
Norfolk State	7,100	5,204	-26.7%
Virginia State	6,208	4,385	-29.4%

Longwood's focus in the current strategic plan has been to increase enrollment by improving retention and graduation rates. A number of initiatives have been explicitly focused on this. First, in March 2018, Longwood opened its first student success center, Brock Hall, a new building that serves as a "one-stop shop" providing a full suite of resources directed at ensuring students stay on path to graduation. The building serves as a modern, technology-filled hub for essential academic support services, including the Center for Academic Success, Writing Center, Registrar, Office of Financial Aid, Disability Resources, and First Year Experience and Family programs.

Another major initiative has been the creation of 60 freshman coaching groups, under the guidance of a faculty or staff member and designed to help students acclimate during the transition to college with the help of a mentoring and support network. The program was piloted in the spring of 2018 and launched campus-wise the following fall. The program is being renewed for fall 2019, thanks to preliminary survey data indicating students who participated regularly --- even only a few times --- in their coaching groups showed higher GPAs and hours earned, as well as lower academic probation rates. The Longwood University Foundation likewise has been turning its efforts powerfully to scholarship funding, with data

indicating significant retention gains for scholarship recipients. It is also clear that the co-curricular experience at Longwood continues robustly as one of the University's greatest strengths, crucial to retention --- the 2017 NSSE results for instance show that Longwood students are much more likely than students at peer institutions (southeast publics) to hold formal leadership roles on campus, with 64% of Longwood seniors reporting they have over their time in college, versus 36% for peer institutions.

These efforts have come in the face of significant challenges. Proudly, the number of Longwood students on campus who are first-generation college students in their families has increased substantially, from 681 in 2012-13 to 1,258 in the current year. The overall proportion of students this year stands at 28%. Nationally, such students are statistically more likely to struggle with the transition to college. Nonetheless, Longwood's graduation rates have steadily moved upward since 2013. Most notably, the proportion of students who graduate within four years has increased from 44% for incoming freshmen in 2007-08 to 53% for those who entered in 2012-13. The 6-year graduation rate has increased from 64% to 68%. Nationally, roughly 10% of public institutions have a four-year graduation rate greater than 50%.

Renewing General Education

Imagining, designing and implementing a distinctive new core curriculum has been an intensive priority and endeavor of the University during the course of this strategic plan. An Academic Core Curriculum Committee was appointed by Faculty Senate in the fall of 2013-14, comprised of 13 members from across departments and colleges. After three years of design and development, a new general education curriculum was approved overwhelmingly by Faculty Senate in the fall of 2016-17, and unanimously by the Board of Visitors later that semester. Implementation began with the class of freshmen arriving in the fall of 2018-19.

Upon recommendation from a campus committee, the BOV in the spring of 2017-18 adopted a formal name for the new curriculum: "Civitae." The word is unique to Longwood but evokes several key elements of the curriculum. Its "civic" root emphasizes civics education and Longwood's mission of educating "citizen leaders." "Vitae" --- Latin for "life" --- reinforces that the curriculum serves as preparation for all aspects of a full life, including citizenship and work. Vitae also evokes "curriculum vitae" --- a synonym for résumé in academic and professional circles. This highlights the value of the curriculum's focus --- in particular on oral and written communication, critical thinking, problem-solving and teamwork --- not just for citizenship but as important skills for a successful career in any field.

Civitae is built on a unique structure that includes "Foundations" courses which introduce students to notions of citizenship and to disciplinary knowledge, "Perspectives" courses designed for students to develop the ability to address issues from multiple disciplinary lenses, and the capstone "Symposium on the Common Good," explicitly designed to prepare students for life in a democracy and to fulfill Longwood's citizen-leadership mission.

At most institutions, general education courses are boxes to check --- a series of seemingly unconnected classes, often taught as large lectures, with little connection to other courses or the institutional mission. At Longwood, Civitae courses will be taught in small settings, across all four years of college. And the careful design work at the front end of the process has also ensured other benefits, including the removal of needless curricular obstacles and broader opportunities to expose students to a range of majors.

Civitae came to life in the fall of 2018 with the debut of 80 Foundations level courses. As of the spring of 2019, another 43 courses had been approved as implementation moves into the Perspectives level starting in 2019-20, with many more under development.

Higher education is a bulwark of democracy, and the University's aspiration is for Civitae to become a defining and distinctive aspect of a Longwood education for generations of students, who go on to purposeful lives of citizen leadership.

National Marketing

Longwood's national visibility has expanded greatly since 2013. In particular, being selected to host the 2016 U.S. Vice Presidential Debate was a signature moment for the University. In addition to producing national attention for Longwood, the Debate drove important academic and student engagement and was a true public service to the country.

By a comparable formula as used by past host sites, it is calculated that Longwood earned media value of more than $83 million (compared to $53 million for 2012 Vice Presidential host site Centre College). Substantial stories appeared in top publications and outlets including: *PBS Newshour, The Washington Post, The Atlantic, The Wall Street Journal, Time, USA Today, The Washingtonian, ABC News, Inc, The New Yorker, Sirius XM,* and many others. Additionally, four national cable television networks broadcast on stages on campus a total of 46 hours during the days around the debate. This constant coverage highlighted campus and the energy of the student body.

More than 30 courses across 15 disciplines were created for the 2016 fall semester --- precursors in many ways for the development of Civitae courses --- and more than 1,000 students enrolled in one of these courses. The courses ranged from expected fields like history and political science to music appreciation, conceptual physics and bookbinding. Faculty were also deeply engaged in efforts to bring speakers to campus on behalf of every department to speak to students about the obligations of citizenship. And students took active roles in debate planning, preparation and participation. More than 700 students volunteered, matched with roles that complemented their studies or interests.

The Debate has been a source of catalyzing pride on campus, among alumni, and in the Farmville community. Nationally, Longwood set a new bar for what universities can achieve in hosting a debate.

The Debate highlighted the significant philanthropic momentum Longwood enjoys, with the University having raised $40.75M since 2013 in total, a record pace which includes Longwood's largest gift in history in the month following the Debate, $5.9M from Joan and Macon Brock to endow the Brock Experiences initiative.

The Strategic Plan envisioned the percentage of alumni donors as a metric of the success of overall marketing. Longwood continues to work to increase the alumni giving rate, despite trends in America of fewer active annual donors; Longwood's alumni ranks also continue to swell, making the denominator of the percentage larger. The alumni giving rate remains a crucial focus --- it is an indicator of alumni engagement, and annual donors are the most likely to consider major philanthropic commitments.

Alumni Giving	FY 2011	FY 2012	FY 2013	FY 2014	FY 2015	FY 2016	FY 2017	FY 2018
Alumni of Record	30,360	30,024	30,868	27,197*	27,197*	27,894	28,691	29,522
Alumni Donors	3,465	3,293	3,133	2,575*	2,976*	3,126	2,890	2,813
% Rate	11.41%	10.97%	10.15%	9.47%	10.94%	11.20%	10.07%	9.53%

**Beginning in FY14, per standard national practice, only undergraduate alumni are included in this category*

Beyond the Debate, Longwood's name has for the first time appeared regularly in the national press, including *Politico*, *The New Yorker*, *The Atlantic*, *Time*, *Newsweek* and *USA Today*, among others. The reach of the Longwood name via social media has also increased substantially, boosted by the 2016 Debate. Total social media audience (total number of followers) has increased threefold, and total social reach (total audience for posts on Twitter and Facebook) hit 21.7 million last year, an increase of 43% since 2013.

A climb upward within Longwood's category in the U.S. News and World Report "America's Best Colleges" rankings has drawn attention as well. From 2014 to the most recent report in 2018, Longwood climbed from No. 12 to No. 8 among regional public universities in the South. Among Southern regional universities (both public and private) Longwood has increased six places in three years. No other Virginia public university in that category --- and in fact only a tiny handful of institutions nationally in any category --- have risen so far during that time period.

Longwood's Division 1 athletics program likewise has provided distinctive opportunities for visibility, and the program's engagement with a wider audience has continued to elevate the Longwood name. The program's Facebook and Twitter followers each roughly doubled over the course of the Strategic Plan. The softball team's four Big South championships in six seasons and 2016 and 2017 trips to the Regional Finals of the NCAA Tournament have given Longwood prominence in a rapidly growing sport. In 2018-2019, Longwood's men's basketball team, following its most successful season of the Big South era, accepted the program's first-ever postseason tournament bid, and Head Coach Griff Aldrich was named as one of 12 finalists for the Joe B. Hall award given annually to the top first-year head coach in the nation.

Foot Traffic by Alumni & Friends

Driven by the prominent role of foot traffic in the Strategic Plan, in 2013-14 the University's conferences and events operations underwent a substantial reorganization and repurposing. Eventually renamed "University Events and Ceremonies," the office has laid a strong foundation for making Longwood along with Farmville a more frequent destination for conference and events, including weddings. It is in this area that the metrics of the Strategic Plan have seen some of their most substantial improvements. The attendance metric laid out in Plan has increased from under 40,000 visitors in 2012-2013 to more than 124,000 each of the past two years.

Attendance of Longwood Programs, Exhibits, Conferences, and Athletic Events

FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY 2017	FY 2018
39,099	35,654	39,354	44,584	51,729	71,662	124,844*	138,126

**This figure does not include foot traffic brought to campus by the U.S. Vice Presidential Debate*

The trend is poised to continue upward with the 2018 opening of the Weyanoke Hotel and the University's strong partnership, under which the University provides fee-based access to a broad range of meeting and event spaces which the hotel lacks, and the hotel offers a uniquely positive visitor experience steps from campus for prospective students, families, and other guests. The Weyanoke is one of three new hotels to open in Farmville in the wake of the 2016 U.S. Vice Presidential Debate.

In collaboration with Hampden-Sydney, Farmville, and Prince Edward County, Longwood has also taken the lead in the creation of visitfarmville.com, a web site that has consolidated the area's tourism communications and helped advance its recognition as a great and historic two-college town. From its debut through the end of last year, the site reached almost 3 million people via Facebook, and received more than 100,000 website visits. Another key step was the decision to move Longwood's campus bookstore from Longwood Landings to the community's most central spot --- the intersection of Third and Main Streets downtown --- where it has helped attract foot visitors and contributed to a reinvigorated downtown retail neighborhood already anchored by the Longwood Center for the Visual Arts and its regular procession of exhibitions and community and educational events, which have been important and acclaimed attractions regionally and nationally. And attendance has steadily climbed for Longwood athletics events, including Longwood's hosting of the 2017 Big South softball tournament.

On campus, Longwood committed to the strength and appeal of its classical architecture and to turning the campus back outward toward the community. The opening of the Maugans Alumni Center in the fall of 2015-16 is a powerful example, and draw for alumni. The Curry/Frazer renovations underway will transform the South Main Street side of campus from a barrier between town and campus into a gateway. Other projects envisioned in the 2015 Master Plan (which is discussed in greater detail below), including the new Joan of Arc statue that debuted in 2018, have contributed to Farmville's attractions as a tourism destination. Longwood's partnership with the Moton Museum likewise has provided important support and strength for the Museum's rapidly growing outreach work.

Also of note both in bringing visitors to the community is the remarkable growth of the Virginia Children's Book Festival, with Longwood serving as campus host and title sponsor. Now among the most very prominent children's book festivals nationally, the fall 2018 Festival sold out and brought more than 8,500 school children to Longwood's campus.

Regional Prosperity

Against powerful demographic and economic challenges confronting many small-town communities, the population of Longwood's immediate community of surrounding municipalities (as measured by proxy through the regularly updated count of registered voters) has held steady during the Strategic Plan. Population is a strong barometer of prosperity, economically but also holistically. Looking to the future, Farmville potentially can see population growth as a college town retirement destination for alumni of Hampden-Sydney and Longwood, as well as from other population drivers.

Community Population – Measured by Registered Voters

July 2011	July 2012	July 2013	July 2014	July 2015	July 2016	July 2017	July 2018
39,184	39,258	39,168	38,925	37,626	38,078	38,009	38,280

Total registered voters of Buckingham, Charlotte, Cumberland, and Prince Edward

Over the past five years, the University has taken meaningful steps to make the community a more attractive place to live and to help it thrive culturally and economically. The new Andy Taylor Center for Early Childhood Education has increased and improved childcare options available to the community. Longwood's Small Business Development Center has assisted hundreds of existing and potential businesses, and the substantial growth in foot-traffic for campus events has helped support new hotel capacity, including Longwood's close partnership with the Weyanoke. The LCVA has played an essential

role in providing access to the arts for area residents and especially schoolchildren, and its exhibition openings, programs and monthly Friday Wine-and-Brew events have become mainstays of the local community. One of just a few dozen nationally accredited university art museums, it has attracted not only a steady increase in visitors but a growing reputation in the regional and national art communities; its 2017-2018 exhibition "Break Glass: A Conversation to End Hate, The Art of V.L. Cox" exhibition garnered particular attention.

Longwood has also endeavored to take important steps to help move the community forward toward reconciliation, recognizing its essential need to engage frankly with our painful civil rights history in order to move forward together. In 2014, the Board of Visitors made an apology for Longwood's actions, and inactions, during the Civil Rights era --- an apology that received national coverage in *The Washington Post*. In 2015, the University began a partnership between the Moton Museum that has proved profoundly beneficial, allowing the Museum to expand its work and connecting the University closely to an important resource for scholarship and its citizen-leadership education mission. The remarkable increase in awareness of the Barbara Johns story --- boosted in particular by coverage around the Vice Presidential Debate (including during the Debate itself), its inclusion in the Virginia Standards of Learning, the renaming of the Virginia Attorney General's office building in her honor, and the designation of April 23 as Barbara Johns Day across the Commonwealth --- has dramatically increased awareness of Farmville and Prince Edward's consequential role in American history. Lastly, in 2018 Longwood built and revealed a monument to the community's significant role in the story of American freedom across several centuries, from Patrick Henry to Israel Hill to the Moton Strike.

Taken together, these steps on the part of the University have by no means moved the community fully beyond its complicated and often painful past. They have, however, contributed to a new sense of self-reflection and identity as a place that reckons honestly from past history and works to use that history as a beacon of education for others. The telling of that story during the 2016 Vice Presidential Debate reinforced that new self-conception both to the community and to the broader world. Similarly the unprecedented practical and logistical cooperation between Longwood and local communities on security and other matters also helped move beyond the more stressed town-gown relations of the past and usher in a new era of open cooperation, including shared emergency services and other partnerships, and goodwill that will pay benefits for years ahead. All these steps have been essential in Farmville's continued progress.

Similarly, Longwood has looked to make campus a hub of activity and energy for the University but also the broader community. Among President Cormier's many bold accomplishments, creating Brock Commons at the turn of the century is certainly among the foremost. It allowed for the possibilities that a fresh campus master planning process could envision.

From the summer of 2014 through the end of fall semester 2015-16, Longwood worked closely with New York-based architecture and planning firm Cooper Robertson Partners to develop a new campus Master Plan --- a detailed document that sets out a vision and articulates priorities for the University's campus and facilities through 2025 and beyond. Cooper Robertson Partners is a global leader in an approach to architecture and planning known as "new urbanism," which emphasizes walkability and connecting campuses more closely to their home communities.

After more than a year of research and design work, including at least 87 meetings with constituents on campus and throughout the greater Farmville community, Longwood introduced the plan, titled "Place Matters: The Longwood University Master Plan 2025," at a public presentation and reception at the LCVA.

A central idea animating the Master Plan is that for all of the flux and change underway in higher education and indeed the world, the core Longwood experience of camaraderie and living and learning amongst one another remains a thing of unsurpassed value and importance.

Longwood's Campus Master Plan recognizes the foundational beauty of the University's campus and builds upon it, while suggesting creative solutions for those places that need improvement. Its most distinctive feature is a commitment to using thoughtful planning and design to knit the campus, Moton Museum and greater Farmville more closely together --- to create walkable, shared spaces that will attract more people to campus, and help Farmville reach its potential as a great college town. The planning process also included substantial research and analysis in areas such as space needs and allocation, energy usage and sustainability, and parking and transportation.

All of the building projects the University or Real Estate Foundation have pursued from 2014-15 forward --- Sharp and Register Halls, the Upchurch University Center, Brock Hall, the Main Street bookstore, the Andy Taylor Center, the transformation of Curry and Frazer Halls, the new admissions office, the new academic building, the High Street gateway, Stoddart's Joan of Arc --- have taken inspiration from the master plan and in that regard been aimed at vibrancy on campus that connects with downtown Farmville.

Taken together, these steps amount to meaningful progress in making possible regional prosperity --- with Longwood's strength, stability and community-mindedness serving as an essential anchor. In our immediate communities of Farmville and Prince Edward, significant challenges remain related to health, education and economic opportunity, and our vision of regional prosperity has always and must going forward be a broad-based one that extends beyond our immediate campus and community.

Strengthening the University Community

In 2013, Longwood was strongly focused on the simple fact that increasing compensation was of fundamental importance in order to recruit and retain staff and a faculty of excellence to deliver the University's distinctive academic experience. There is need for continued progress, but the period of the Strategic Plan has seen substantial momentum in increasing average compensation. The number of full-time faculty has also grown from 228 in 2012-13 to 262 in 2017-18.

Longwood Average Compensation

	FY2011	FY2012	FY2013	FY2014	FY2015	FY2016	FY2017	FY2018
Classified Staff	$37,068	$38,975	$39,549	$40,969	$42,201	$42,572	$42,416	$43,517
AP Staff	$57,577	$58,673	$60,458	$62,433	$63,851	$65,084	$67,196	$66,792
Professor	$77,300	$77,300	$77,200	$80,000	$80,100	$82,057	$83,437	$85,710
Associate Professor	$63,000	$61,400	$64,300	$65,800	$67,100	$69,146	$69,921	$71,555
Assistant Professor	$53,800	$55,100	$57,100	$59,600	$59,200	$62,622	$65,056	$65,821
Instructor	$56,400	$57,200	$60,000	$55,700	$58,400	$65,634	$59,068	$60,625
All Faculty	$62,625	$62,750	$64,650	$65,275	$66,200	$69,472	$70,833	$72,318

Longwood has also been cognizant of those at the lowest end of the compensation range who work on campus --- including not just our own staff but those employed by outside contractors who do the difficult and often thankless work of keeping the campus clean. These workers are not technically Longwood employees but work among us every day and are considered colleagues. In the recent transition to a new provider of cleaning and housekeeping services, the new provider, Budd Group, committed to a meaningful increase in the salaries of its employees working at Longwood. Additionally, while only 30% of housekeeping staff previously had full-time hours, under the new arrangement all staff will be able to work full-time and be eligible for benefits. All employees who wished to continue on were offered positions.

As a public institution, Longwood's educational mission calls us as well to make progress toward a campus community that reflects the Commonwealth as a whole. Crucial work in this regard lies ahead, and closely relates to the University's work of reconciliation in the broader community. The percentage of students of color at Longwood increased from 11% in 2012-13 to 16% in 2018-19, and in 2016-17 Jason Faulk became the first African American to serve as the University's Dean of Admissions. The University Diversity Council also was formalized as a standing body of the UPC in the spring of 2014-15.

Organization, Structuring, and Governance

The pressures on American higher education demand strong and efficient organization for an institution to thrive. Since 2013, Longwood has worked to maximize the deliberative nature of its primary governance bodies, and to inform deliberation with insightful information, trends, and data. The creation of the Office of University Analytics in 2017-18 has enhanced the University's data utility.

Similarly, the restructuring of the University Planning Council in 2014-15 has given the campus community a cross-divisional forum for discussion of issues affecting the University as a whole, as well as an opportunity for strategic focus at regular intervals. The UPC meets three times annually --- in October, January, and April --- offering a new and important connection between divisions of the University that work on common challenges. Five standing committees of the UPC report regularly on their work and deliberations: Assessment, Compliance, Diversity, Finance, Procurement, and Technology.

The University has also given sustained focus to its budgetary processes, including beginning a capital budgeting process for the first time in 2013-14, which has allowed for straightforward alignment of capital spending practices and priorities with the Campus Master Plan. Similarly, with regards to operating revenues and expenses, the University has been working diligently year by year to revamp its budgeting processes and procedures to align expenditures with strategic priorities, such as increasing compensation. This work has also been closely attentive to Commonwealth expectations and practices, including Virginia's significant shift in accounting protocol regarding VRS obligations, which from 2015-16 forward made use of the CFI metric (more typical to private institutions) less practicable or insightful.

Throughout, Longwood has endeavored to be a leader within the Commonwealth in demonstrating discipline to rein in annual increases in tuition and mandatory fees. The University's 2014-15 increase of 2.1% was the smallest percentage increase at any Virginia public four-year institution in more than a decade. Over the 10 years previous, the average increase across Virginia had stood at 7.3% annually.

Over the full-period from 2013-14 through the current academic year, Longwood's average annual increase for tuition and mandatory fees stands at 3.3 percent --- the second-lowest in the state behind only Virginia State, with Virginia Tech being the third-lowest. At the same time, Longwood has shifted to making fundraising for student scholarships a top philanthropic priority. With the increase of the

Longwood University Foundation's scholarship focus, as well as a concerted effort to make students more aware of scholarship opportunities and to simplify the application process through a new software platform, there has been consistent and crucial effort to limit the overall increase in the net price Longwood students actually pay for college. The urgency of this priority is underscored by the growing financial need of the student population the university serves.

Strength in organization, structure and governance are essential to continuing to make progress in the critical work of containing the rise in college costs, which have also done so much to undermine public faith in higher education. A 2018 Pew Research Center poll that attracted considerable national attention found that 61% of American said higher education is going in the wrong direction. Among those who felt that way, 84% cited high tuition costs as a major reason.

Average Annual Percentage Increase
Tuition and Mandatory Fees
FY2013-14 through FY2018-19

William & Mary	8.7%
Christopher Newport	5.9%
UVA	5.9%
James Madison	5.6%
Norfolk State	5.6%
VMI	5.6%
Mary Washington	5.5%
George Mason	4.7%
Radford	4.6%
Old Dominion	4.3%
VCU	3.9%
Wise	3.5%
Virginia Tech	3.5%
Longwood	3.3%
Virginia State	3.1%

Freshman Tuition & Mandatory Fees

Commonwealth officials applaud Longwood for its leadership in tuition moderation, and state funding for the University's operations, initiatives, and capital projects has been consistent and strong amidst the pressures of the Commonwealth's budget.

Overview

Those in decades ahead considering Longwood will likely see these recent years as historic and consequential for the University. America and American higher education are facing turbulence unlike any experienced for generations. But Longwood has been building robust momentum despite the broad, systemic challenges. Foremost, that is because of the dedication of those who love the institution --- students and families, alumni, faculty, staff, coaches, the many members of advisory boards and foundations, community members and leaders, the Cabinet, and especially the Board of Visitors, whose vision and selfless and energetic devotion are at the heart of this momentum.

The consequential actions and successes are many: the Civitae Core Curriculum, the Moton Museum partnership, the University's statement of apology for its failures during massive resistance, the 2016 U.S.

Vice Presidential Debate, the dramatic rise in press and media attention and in social media engagement, the Campus Master Plan and the beauty and unparalleled advance of capital projects, including the Upchurch University Center, the freshly vibrant connection with Farmville, Longwood's burgeoning athletic profile, the record philanthropy, the increasing diversification of the student body and growing number of first generation students, the consistent and crucial attention to compensation, and at the same time leadership in controlling college costs.

For Longwood, which celebrated 175 years in 2013-14, this progress and the challenges on all sides demand bold approaches for the years to come.

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Longwood University Foundation Board Report
Board of Visitors Meeting
June 7, 2019

- Spider reported a preliminary balance of $64.5 million as of March 31, 2019. The fund has accumulated a gain over three quarters of 1.35%. These disappointing results are largely influenced by significant losses in the fourth quarter of 2018. Through the first four months of 2019, the portion of the fund invested in public equities, which comprises 65% of the total investments, has a cumulative return in excess of 10%, so we are hopeful this total return will increase in the fourth quarter of our FY2019.

- The Foundation Board will retreat in June at Hull Springs Farm. We will see firsthand this wonderful asset and learn more about its value as a research facility, how it has partnered with local schools, and how it generates operating funds via the sale of various environmental credits received as a result of restorative work being done on the property. Sherry Swinson will provide a brief update on future plans for the facilities, its capital needs and fundraising efforts.

- At the June Board meeting, the primary focus will be on scholarships and student recruitment.
    - Part of the meeting will be spent on education for the members to enhance their knowledge of the competitive environment in which the University operates. Dr. Lara Fergeson, Provost, will lead a discussion on the value/ROI of a college education and how Board members can effectively convey that message to prospective donors and students.
    - We will also discuss ways the Board can collectively and individually collaborate with Advancement to increase scholarship dollars.
    - We will also discuss innovative ways to prepare and provide additional funding for the next Longwood University recruitment cycle, with guests Jason Faulk, Dean of Admissions and Sarah Doheney, Director of Financial Aid.

- During Alumni Weekend, following the Color Wars, the Foundation Board will join alums at Hotel Weyanoke's Catbird for cocktails, to provide visibility to Hotel Weyanoke and the Foundation, and to celebrate the success of Longwood. A fun photo will support instantaneous social media posts. The Hotel is donating 10% of drink proceeds to Longwood Cares – A Student Emergency Fund.
    - During Commencement ceremonies, the Senior Class announced that part of its gift to the University was dedicated to the Lancer Cares Fund. The class left a legacy to help fellow students.
    - With support from Foundation Board, Lancer Cares raised $16,000, which should provide sufficient funds to help students with unexpected emergencies.
    - Similar programs at other universities have proven to support additional engagement within the student/alumni population as they "pay forward" the kindness extended to them during a time of crisis.

Board of Visitors Meeting June 2019

Longwood University Real Estate Foundation

Curry and Frazer Residence Halls Renovation

The renovation of Frazer Hall is essentially complete. The site has had over 150 workers at a time. The exterior appearance is beautiful – a stunning transformation. Students will begin occupying the building in August of this year. The project is on schedule and on budget.

Demolition work has begun in Curry Hall.

Joan Perry Brock Center

The Center is made possible by a very generous $15 million gift from Joan Perry Brock (Class of 1964), the largest gift in the history of Longwood. It will serve as a convocation center and include the new home of Longwood's men's and women's basketball. The Center will be located along Brock Commons near Willett Hall, with a projected opening by spring of 2022. The building will be designed in Longwood's traditional architectural style and will serve as a host for speakers, concerts and shows in addition to Longwood basketball games. The Center will be a "jewel in the crown of Brock Commons," said President Taylor Reveley, and "means the world that Longwood students will be walking to these great university events, concerts and basketball games right in the very heart of campus."

The Hotel Weyanoke

The Foundation has hired a consultant to advise on how the operation of the Weyanoke can be improved. The property itself has been tastefully renovated. The hotel is an important resource for the University, and the Real Estate Foundation will work with the owner/operator and consultant to ensure that the property satisfies the needs of the University.

Hull Springs Farm

The Foundation is pursuing the financing and development of the initial phase of development at Hull Springs Farm. Representatives of the Foundation continue to work closely with all interested stakeholders, including in particular the Westmoreland County Public Schools. Camp LUCEE, which has been a notable success since its inception, will again operate in the summer of 2019.

Property Acquisitions

The Foundation continues to be alert to opportunities to purchase and develop or redevelop properties in Farmville in accordance with the Master Plan.

Alumni Board Report

The Alumni Awards Ceremony was held on March 15th. The recipients were:
Randy P. Copeland, Class of 1986 (William Henry Ruffner Alumni Award)
Otis L. Brown (Horace Mann Honorary Alumni Award)
Judy D. Deichman, Class of 2010 (Jefferson Professional Achievement Alumni Award)
Robert K. Newman, Class of 2012 (Rotunda Outstanding Young Alumni Award)
Jean R. Appich, Class of 1952 (Page Cook Axson McGaughy Lifetime Loyalty Award)
Betty A. Eike, Class of 1965 (Nancy B. Shelton Spirited Contributor Award)

The Alumni Board held elections in March for new officers who will begin their terms on July 1st:
President: Becca Shelton; Vice-President: Erica Howell; and Secretary: Paige Rollins

Senior Toast was held on May 10th. Following a social hour, there was a presentation with two students serving as the emcees. Guest speakers included an alumnus from the class of 2018 and two members of the faculty. President Reveley addressed the seniors, highlighting events that had occurred throughout their years at Longwood. Seniors and their guests then proceeded from the Upchurch Center to the Rotunda, walking by the statue of Joan of Arc, and into Blackwell for dinner and dancing. This special event seems sure to become a lasting and treasured tradition at Longwood.

At the commencement ceremonies on May 17th and 18th, Alumni Board members were on hand to ring the bell and distribute a small gift to each graduate.

We all anxiously await the Alumni Weekend (May 31st-June 2nd). Among the planned events is a new one- "Longwood Love Stories" created through collaboration between the Foundation Board and the Alumni Board. The Alumni Board will also share information about Longwood's alumni traditions and programs, as well as the Board's community outreach efforts during throughout the weekend.

The Office of Alumni and Career Services reports that:

-The 1 Hour a Month program continues to engage the alumni community. During the 2018-2019 year, an average of 82 alumni contributed at least one hour of time, and the program itself is on track to produce almost 1000 of total volunteer hours.
-Plans for the 2019-2020 academic year include the launching of new professional communities to connect alumni, faculty, staff and students beginning with a Technology and Product group over the summer with plans for a Human Resources and Recruitment community in the fall. These two new communities will complement the existing Educators and Sales, Marketing, and Communications communities.

The Alumni Board will meet again on June 7th-8th. Dr. Larissa Fergeson will be the guest speaker.

Tammy Jones, President, Alumni Association

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Steve Helms is vice president of Primland, a 12,000-acre luxury resort in the Blue Ridge Mountains.

Reaching the Top

From logging to running a luxury resort in the Blue Ridge Mountains

Most of us would confess to having indulged in a work-time daydream that involved golfing on a world-class course or hunting in a pristine mountain reserve or pampering ourselves at luxury spa.

Person of Interest

'I think the key and what sets us apart is that, while we are vast in size, we operate as a boutique property with an emphasis on personal service.'

— Steve Helms '84

For Steve Helms '84, those fantasies are the everyday reality of his job. Well, at least managing those fantasies.

Helms is vice president of Primland, a 12,000-acre luxury resort in the Blue Ridge Mountains that can—without a hint of hyperbole—be described as breathtaking. With elevations of up to 3,000 feet, Primland overlooks Winston-Salem, N.C., about an hour away.

Helms has worked there since his college days, his climb to vice president paralleling Primland's growth from a logging company to an eco-friendly retreat for outdoor enthusiasts with significant disposable income.

Both Primlands' and Helms' stories have an unusual first few chapters.

In 1977, French-Swiss billionaire Didier Primat started a pine chips and logging company on his property in Meadows of Dan, Va., which happened to be Helms' hometown.

At about the same time, Helms had taken a break after high school to work in construction and logging. "Looking at the people in management, I realized that, if I wanted to get where they were, I'd have to go and get a college education," he said. Helms began work on a business degree at Longwood and, in 1980, went to work for Primat, pulling trees out of the woods in the summer and on winter and weekend breaks from his studies.

In the early 1980s, Primat patented a machine that produced firewood logs. After graduating from Longwood in 1984, Helms went on the road selling the pre-packaged logs to campgrounds and stores around the country.

Then, in 1990, Primat decided to get out of the firewood business and transformed the company into a hunting reserve for pheasant and quail. Helms was put in charge of special projects. Soon Primland added horseback riding, fly fishing, a spa and mountain homes to its offerings.

"There was always an opportunity to grow, and it was always challenging," said Helms, who was named vice president in 1998.

To complement the resort's successful winter hunting business, a golf course on top of the mountain opened in 2006. Consistently ranked one of the region's best, the course itself is environmentally friendly, with bio-filters strategically placed to protect the natural trout streams and rivers that surround it. Nearby wetlands are considered environmentally sensitive areas and remain untouched.

"The company has always been environmentally conscious. They do the right thing," said Helms. "I think the key and what sets us apart is that, while we are vast in size, we operate as a boutique property with an emphasis on personal service."

As vice president, Helms manages more than 180 employees and interacts with people from all over the world. He credits his experience at Longwood with exposing him to people from different backgrounds and teaching him to be a successful communicator.

"I loved meeting people from different areas and learning how they lived," Helms said of his time at Longwood. He also values the business training he received, particularly in economics.

Over the years, Helms has never considered working anywhere else. When asked why, his answer is simple: "It's home."—*Jeanne Russell*