

**Six-Year Plans (2011) 2012-14 through 2016-18**

Approved by Board of Visitors September 10, 2011

**Due: July 1, 2011**

**Institution:** LONGWOOD UNIVERSITY

**Institution UNITID:** 232566

**Individual responsible for plan**

**Name:** Patrick Finnegan, President

**Email address:** [finneganp@longwood.edu](mailto:finneganp@longwood.edu)

**Telephone number:** 434-395-2001

**Six-Year Plans (2011)  
Longwood University**  
ACADEMIC PLAN

Approved by Board of Visitors September 10, 2011

Instructions: In the column entitled "Academic and Support Service Strategies for Six-Year Period (2012-2018)," please provide 2-3 sentences detailing strategies (for the three biennia of this six-year period) associated with each objective of the "Preparing for the Top Jobs of the 21<sup>st</sup> Century: The Virginia Higher Education Opportunity Act of 2011." The information provided should be macro-level information with sufficient detail for the reader to understand your general approach.

Priority Ranking	Within Tuition Increase	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2012-2018)								
		Biennium 2012-2014 (7/1/12-6/30/14)				Biennium 2014-2016 (7/1/14-6/30/16)				
		Strategies	TJ21 Objectives	Cost: Incremental, Savings, Reallocation				Strategies	Strategies	
				2012-2013		2013-2014				
Amount	Within Increase			Amount	Within Increase					
		Continue to allocate additional aid as tuition is increased. In an effort to mitigate the impact of tuition and fee increases, Longwood will provide financial aid assistance to Pell Grant recipients, the institution's financially neediest student population. Costs associated with this strategy are reflected on the Finance-Operating tab as a specific item.	A: Financial Aid	Incremental:	\$0	\$0	\$0	\$0	Continue to allocate additional aid as tuition is increased. In an effort to mitigate the impact of tuition and fee increases, Longwood will provide financial aid assistance to Pell Grant recipients, the institution's financially neediest student population.	Continue to allocate additional aid as tuition is increased. In an effort to mitigate the impact of tuition and fee increases, Longwood will provide financial aid assistance to Pell Grant recipients, the institution's financially neediest student population.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
3	No	Initiate SOLstice, a summer science institute for Longwood University middle school science teacher candidates and practicing middle school science teachers engaged in scientific research through face-to-face and online programming. This is a four-week program designed to invigorate practicing teachers and to inspire developing teachers by engaging them in real science related to environmental issues while working side by side with Longwood University Faculty.	B: Year Round Use	Incremental:	\$0	\$0	\$0	\$0	Explore additional ways to expand program offerings to expedite student completion through online and residential programming, including the "Mini-mester" or the "May-mester" programs.	Continue to explore ways to better utilize its facilities.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$50,000	\$0	\$50,000	\$0		
4	No	Initiate Summer STEM Research Experiences for Undergraduates (REU) program, which is an 8-week summer research program for undergraduates mentored by LU science and math faculty.	B: Year Round Use	Incremental:	\$0	\$0	\$0	\$0	Explore additional ways to expand program offerings to expedite student completion through online and residential programming, including the "Mini-mester" or the "May-mester" programs.	Continue to explore ways to better utilize its facilities.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$175,000	\$0	\$175,000	\$0		
8	No	Expand the J-Term to enable more students to take required courses within majors, facilitating timely degree completion. The J-Term is held over the winter break from mid-December to mid-January and allows students to take up to two courses (six credits), which can be used to accelerate their degree process. NOTE: The University's facilities are heavily used during the summer for summer school and by conference groups (over 5,000 participants, including Girls State); funds are reinvested into the University's academic programs and operations.	B: Year Round Use	Incremental:	\$0	\$0	\$0	\$0	Explore additional ways to expand program offerings to expedite student completion through online and residential programming, including the "Mini-mester" or the "May-mester" programs.	Continue to explore ways to better utilize its facilities.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
36	No	Continue development of the Ed.D. program in Educational Leadership that currently partners Longwood faculty with Virginia Commonwealth University. Currently, the program awards a VCU degree; however, Longwood is partnering to prepare for the development of its own program in 2014-15.	C: Resource Sharing	Incremental:	\$0	\$0	\$0	\$0	Partner with other Virginia institutions to develop a "virtual language department" for the teaching of Arabic and Chinese. Longwood will coordinate with other institutions on potential partnerships to maximize institutional efficiency opportunities.	Explore a nuclear engineering research collaboration with VCU and corporate partners.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
2	No	Seek SCHEV approval for a bachelor's degree in Environmental Science (this STEM program has already been approved by Longwood's Board of Visitors) and initiate program (1 Faculty FTE). The first class for this program would be enrolled in Fall 2012.	D: New Programs or Initiatives	Incremental:	\$0	\$0	\$0	\$0	(1) Enhance and create additional programs producing more secondary math/science teachers. (2) Open the Center for Environmental Stewardship focusing on research in Farmville and Hull Springs Farm in Westmoreland County. (3) Increase laboratory undergraduate research opportunities. (4) Enhance Teaching Fellows Program for new Ph.D. students interested in teaching at the college level. (5) Explore the development of a Masters in Social Work program. (6) Explore the development of a 2+2 business education program with Southside Virginia Community College.	Develop additional health care programs using our nursing program as the anchor.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$118,552	\$0	\$118,552	\$0		
26	Yes	Increase student recruitment and marketing initiatives. This is a pro-active, targeted effort to ensure that the University can maintain its current student enrollment and meet its enrollment projections. With the Commonwealth providing additional funding to four institutions to enroll more Virginia students, we are extremely concerned that our in-state student enrollment could decline from its current numbers, which would be counter to our own enrollment projections and meeting the Governor's goals of educating more Virginians. Additionally, a recent survey conducted by a public relations firm revealed that a large number of Virginians have limited, if any, knowledge of the University. We are currently revising our marketing plan to increase the public's understanding of the University, its academic programs and the benefits associated with our smaller class sizes and faculty and staff interactions with students.	E. 1: Increased Enrollment of Virginia Students	Incremental:	\$100,000	\$100,000	\$100,000	\$100,000	NOTE: Longwood's current student population is 95-96 percent Virginia students. The University plans to keep its Virginia student enrollment at 90 percent or higher. The University will develop incentives to enroll more students from under-represented populations. Longwood will enhance its recruiting efforts in areas of the Commonwealth not currently widely represented in the student body.	NOTE: Longwood's current student population is 95-96 percent Virginia students. The University plans to keep its Virginia student enrollment at 90 percent or higher. Longwood will initiate new programs that emerge from the Academic Strategic Plan.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		

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Priority Ranking	Within Tuition Increase	ACADEMIC AND SUPPORT SERVICE STRATEGIES FOR SIX-YEAR PERIOD (2012-2018)								
		Strategies	TJ21 Objectives	Biennium 2012-2014 (7/1/12-6/30/14)				Biennium 2014-2016 (7/1/14-6/30/16)	Biennium 2016-2018 (7/1/16-6/30/18)	
				Cost: Incremental, Savings, Reallocation						
				2012-2013		2013-2014				
Amount	Within Increase	Amount	Within Increase							
27	Yes	Identify and seek to re-enroll undergraduate students who have "stopped out" with partial credit, thus increasing the number of Virginians with a degree. To accomplish this, Longwood will become more flexible in acceptance of credit from prior years' academic requirements.	E. 2: Increased Completion for Residents with Partial Credit	Incremental:	\$0	\$0	\$37,295	\$37,295	Assess and likely restructure the Bachelor's of General Studies degree, that is now offered off-site, as a possible on-line program for degree completion for students with partial credit.	Develop an "academic bankruptcy" degree completion program to attract students who have been separated 5 years or longer from Longwood and other institutions due to academic suspension.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
17	Yes	Add new faculty [2 in FY 2013 and 3 additional in FY 2014] to increase the number of sections and class offerings to facilitate students' time to graduation.	E. 3: Increased Completion in Timely or Expedited Manner	Incremental:	\$181,086	\$181,086	\$454,041	\$454,041	Longwood will explore a "Mini-mester" or "May-mester" and determine what programs may be added or expanded to provide the opportunity for students to graduate in an expedited manner.	Develop alternative delivery and alternative terms for degree completion in three years for selected programs.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
37	No	Develop a 3+2 Program with VCU in which students receive B.S. in Physics from Longwood and M.S. in Mechanical Engineering (w/Nuclear Engineering concentration) from VCU.	E. 4: Enhanced Community College, Transfer, and Degree Paths	Incremental:	\$0	\$0	\$0	\$0	Design more flexible degree options for adult students.	Seek financial incentives for transfer students.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
33	Yes	Place admissions counselors on-site at local community colleges to advise and facilitate recruitment of transfer students. The admissions counselors will work with students from rural areas, many of whom are first generation college students, who may not know or understand the options that are available to them through the transfer program.	E. 4: Enhanced Community College, Transfer, and Degree Paths	Incremental:	\$60,528	\$60,528	\$121,056	\$121,056		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
38	No	Assess the feasibility of articulation agreements that allow community college students studying human services in the Associate of Applied Science degree track to transfer into Longwood's social work program.	E. 4: Enhanced Community College, Transfer, and Degree Paths	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
19	Yes	Add 4 positions to the Student Success program to increase retention rates. Student Success is a major initiative at Longwood to increase institutional performance in the areas of student retention and graduation rates by assisting students as they transition from high school or other institutions to Longwood and as they progress toward graduation.	E. 5: Improved Retention and Graduation Rates	Incremental:	\$125,859	\$125,859	\$285,621	\$285,621	Develop a plan for incentives for academic departments to increase student retention and graduation.	Review the success of retention and graduation strategies and modify as needed.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
11	No	Reallocate a senior administrative position to the Academic Affairs division to be responsible for enrollment management, especially retention. This position will work in concert with the Division of Student Affairs toward increasing student engagement and will be responsible for gathering data on retention and assisting with the implementation of the Academic Strategic Plan.	E. 5: Improved Retention and Graduation Rates	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$128,880	\$0	\$128,880	\$0		
1	No	Expand faculty resources in Bachelor of Science in Nursing program (1 FTE) to enroll more students and to meet accreditation needs.	E. 6: Increased Stem Degrees	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$146,001	\$0	\$221,001	\$0		

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		Strategies	TJ21 Objectives	Cost: Incremental, Savings, Reallocation				Strategies	Strategies	
				2012-2013		2013-2014				
Amount	Within Increase			Amount	Within Increase					
5	No	Expand faculty resources (1 FTE) in Communication Sciences and Disorders to accommodate more students in a program currently capped because of accreditation restrictions related to number of students per faculty member.	E. 6: Increased Stem Degrees	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$103,749	\$0	\$103,749	\$0		
6	No	Expand faculty resources (1 FTE) in Athletic Training to accommodate more students in a program currently capped because of accreditation restrictions related to number of students per faculty member.	E. 6: Increased Stem Degrees	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$103,749	\$0	\$103,749	\$0		
7	No	Expand faculty resources (1 FTE) in Exercise Science to accommodate more students in a program currently capped because of accreditation restrictions related to number of students per faculty member.	E. 6: Increased Stem Degrees	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$103,749	\$0	\$103,749	\$0		
25	Yes	Expand faculty resources (1 FTE) in Therapeutic Recreation to accommodate more students in a program currently capped because of accreditation restrictions related to number of students per faculty member.	E. 6: Increased Stem Degrees	Incremental:	\$0	\$0	\$90,246	\$90,246		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
20	Yes	Develop 5-year Bachelors/Master's in Math and Science Secondary Teaching Program. This program will be both time and cost effective for students by saving one year of schooling and one year's cost of tuition. For those graduates that go into the teaching profession, the benefit of the Master's degree would include an additional \$2,000-\$5,000 salary increase upon employment in the public schools.	E. 7: New Programs for Commonwealth's Objectives	Incremental:	\$0	\$0	\$210,000	\$210,000	Implement the M.Ed. program and the Laboratory School. Explore adding additional 2+2 programs with community colleges.	Expand the Laboratory School to reach more middle school students in rural areas.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
24	Yes	Develop 5-year BS/M. Ed program in Liberal Studies (pre-k-8 certification). This program will be both time and cost effective for students by saving one year of schooling and one year's cost of tuition.	E. 7: New Programs for Commonwealth's Objectives	Incremental:	\$171,480	\$171,480	\$257,220	\$257,220		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
32	No	Develop 5-year Physical/Health Education Teacher Education BS/MS degree. This program will be both time and cost effective for students by saving one year of schooling and one year's cost of tuition.	E. 7: New Programs for Commonwealth's Objectives	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
39	No	Develop a summer residential "Early College Preparatory Laboratory School for Middle Grades (grades 6-8)" that would target low socio-economic/free and reduced lunch middle school students in rural Southside Virginia. Southside Virginia has the highest percentage of adults without a high school diploma and the lowest percentage of adults with a bachelor's degree or higher in Virginia, thus, many families may not encourage their children to stay in school and go to college. This program will expose the students to a college environment and campus.	E. 7: New Programs for Commonwealth's Objectives	Incremental:	\$218,955	\$0	\$238,388	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		

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		Strategies	TJ21 Objectives	Biennium 2012-2014 (7/1/12-6/30/14)				Biennium 2014-2016 (7/1/14-6/30/16)	Biennium 2016-2018 (7/1/16-6/30/18)	
				Cost: Incremental, Savings, Reallocation						
				2012-2013		2013-2014				
Amount	Within Increase	Amount	Within Increase							
21	Yes	Expand an Office of Sponsored Programs and Research within the Academic Affairs division to facilitate faculty research and the awarding of grants for research and development. This position would be a compliance officer.	E. 8: Increased Research	Incremental:	\$0	\$0	\$78,537	\$78,537	Enhance undergraduate research opportunities.	Increase the number of selected undergraduate students to present research papers at state and national conferences.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
9	No	Conduct an assessment of productivity and marketability of majors, both current and planned majors, including exploring developing a RN to BSN program and a Master's in Nursing.	E. 9: Efficiency	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$85,000	\$0	\$10,000	\$0		
23	Yes	Increase use of distance learning (including hybrid, online, and video streaming) to off-campus sites, including underserved Southside Virginia locations of Emporia, South Boston, and Martinsville.	E. 10: Technology-enhanced instruction	Incremental:	\$90,000	\$90,000	\$90,000	\$90,000	(1) Explore and develop increased opportunities for online instruction, particularly to off-campus sites. (2) Evaluate the feasibility of e-text books. (3) develop a new instructional teaching unit to support distributed learning.	Implement e-text books for courses where appropriate.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
			E. 11: Economic opportunity initiatives	Incremental:	\$0	\$0	\$0	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
35	No	Continue to refine internal assessment procedures and use the data gathered to improve academic programs. Ensure that programs gain or maintain external program accreditation. Develop the Quality Enhancement Program (QEP) as required by the Southern Association of Schools and Colleges.	E. 12: Innovation and continuous improvement	Incremental:	\$0	\$0	\$0	\$0	Implement the QEP and have SACS accreditation reaffirmed. Continue to monitor internal and external assessment data and implement changes as needed.	Continue to monitor internal and external assessment data and implement changes as needed.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		
10	No	Establish a secure Lab to focus on Cyber-Security technology. Since 2001, cyber-security has been a serious economic and national security challenge. The threat that internet based, digital highway terrorists pose on our energy, commercial, and government computer systems and infrastructure are real. Cyber-security technology is the combination of IT human capital and its associated expertise to protect the hardware, software, and communications equipment critical to the nation.	E. 13: Other initiatives	Incremental:	\$0	\$0	\$0	\$0	Facilitate training for "first responders" and degree programs along with a best practices internship program for high-tech workforce development.	Research projects, led by world renowned experts, will develop new inbound/outbound cyber-war technology. Graduates will take products/services from research into respective businesses and become new recruits for US Defense Intelligence community.
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$100,000	\$0	\$100,000	\$0		
34	No	15 Additional Faculty -- 7 in FY 2013 and 8 additional in FY 2014. These additional faculty positions are required to maintain our medium class sizes and provide the quality of education we provide our students. To fill the gap, we have hired lecturers, some of whom do not have their terminal degrees, thus causing accreditation issues with the Southern Association of Colleges and Schools (SACS), our accrediting body.	E. 13: Other initiatives	Incremental:	\$633,801	\$0	\$1,358,145	\$0		
				Savings:	\$0	\$0	\$0	\$0		
				Reallocation:	\$0	\$0	\$0	\$0		

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		Strategies	TJ21 Objectives	Cost: Incremental, Savings, Reallocation				Strategies	Strategies
				2012-2013		2013-2014			
Amount	Within Increase			Amount	Within Increase				
Total 2012-2014 Costs									
Incremental (Included in Financial Plan line 17)		\$1,581,709	\$728,953	\$3,320,549	\$1,724,016				
Savings		\$0	\$0	\$0	\$0				
Reallocation		\$1,114,680	\$0	\$1,114,680	\$0				

**Six-Year Financial Plan for Educational and General Programs, Incremental Operating Budget Need 2012-2014 Biennium**  
 (Assuming No Additional General Fund)

		Items	2012-2013		2013-2014	
			Amount	Within Increase	Amount	Within Increase
		<b>Total Incremental Cost from Academic Plan<sup>3</sup></b>	\$1,581,709	\$728,953	\$3,320,549	\$1,724,016
		Increase Faculty Salaries <sup>2</sup>	\$0	\$0	\$0	\$0
		Faculty Salary Increase Rate <sup>4</sup>	0.00%	0.00%	0.00%	0.00%
14	Yes	Increase Number of Full-Time Faculty <sup>2</sup> (\$)	\$79,414	\$79,414	\$79,414	\$79,414
	Yes	Increase Number of Full-Time Faculty <sup>2</sup> (FTE)	1.00	1.00	1.00	1.00
		Increase Number of Part-Time Faculty <sup>2</sup> (\$)	\$0	\$0	\$0	\$0
		Increase Number of Part-Time Faculty <sup>2</sup> (FTE)	0.00	0.00	0.00	0.00
29	Yes	Increase Number of Support Staff (\$)	\$97,044	\$97,044	\$194,088	\$194,088
	Yes	Increase Number of Support Staff (FTE)	2.00	2.00	4.00	4.00
22	Yes	Library Enhancement	\$125,000	\$125,000	\$175,000	\$175,000
28	Yes	Technology Enhancement (\$)	\$0	\$0	\$313,832	\$313,832
	Yes	Technology Enhancement (FTE)	0.00	0.00	5.00	5.00
31	Yes	O&M for New Facilities	\$0	\$0	\$167,680	\$167,680
13	Yes	Fixed Cost Increases: Utilities, Fuel, Maintenance Contracts, etc.	\$211,308	\$211,308	\$414,596	\$414,596
18	Yes	Additional In-State Student Financial Aid From Tuition Revenue	\$173,993	\$173,993	\$366,301	\$366,301
		Other:				
12	Yes	Base Budget Shortfall - Replacement of ARRA Stimulus Funds	\$1,500,000	\$1,500,000	\$1,500,000	\$1,500,000
30	Yes	Campus Diversity and Inclusion (\$)	\$0	\$0	\$194,359	\$194,359
	Yes	Campus Diversity (FTE)	0.00	0.00	2.00	2.00
15	Yes	Faculty Equity, Retention and Promotion Pool <sup>5</sup>	\$0	\$0	\$600,000	\$600,000
16	Yes	A/P and Classified Equity and Retention Pool <sup>5</sup>	\$0	\$0	\$250,000	\$250,000
		<b>Total Additional Funding Need</b>	<b>\$3,768,468</b>	<b>\$2,915,712</b>	<b>\$7,575,819</b>	<b>\$5,979,286</b>

Notes:

- (1) Enter staff FTE change over the FY2012 level in appropriate columns.
- (2) If planned, enter the cost of any institution-wide increase.
- (3) Please ensure that these items shall not be double counted if they are already included in the incremental cost of the academic plan.
- (4) Enter planned annual faculty salary increase rate in Cell B22 and D22. Any salary increase entered here will be counted when calculating the gap to reach the 60th percentile in the future.
- (5) Longwood University will establish a pool of money to be used to address salary compression issues, promotion, as well as funds to retain high-quality faculty and staff and who have been offered positions outside of the University. Some employees may receive no increase and others will receive varying amounts - these funds will not be given to faculty or staff across-the-board. Longwood is in the process of having a faculty and staff salary study conducted by an outside firm to determine who would be eligible for the funds. This study is scheduled to be completed in 2012. We know that the funding requirements generated by the study cannot be met in one year, so the recommendations will be phased in over a multi-year period. Using the study, we can pinpoint the most serious salary deficiencies, especially those individuals suffering from salary compression. Each faculty and staff member's salary will be viewed individually. These funds represent "Phase 1" of the project and will address the most egregious salary differences.

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**FINANCIAL AID PLAN**

Instructions: Complete the table for the Actual 2010-11 and Estimated 2011-12 distribution of financial aid by category. The planned distributions for 2012-13 and 2013-14 will be automatically calculated based on the estimated 2011-12 distribution. Adjust the 2012-13 and 2013-14 distributions, as necessary, by entering values instead of using the formulas.

<b>Allocation of Tuition Revenue Used for Student Financial Aid</b>			
<b>2010-11 (Actual)</b>			
<b>T&amp;F Used for Financial Aid</b>	<b>Gross Tuition Revenue</b>	<b>Tuition Revenue for Financial Aid</b>	<b>Distribution of Financial Aid</b>
In-State Undergraduate	\$21,227,713	\$1,121,078	\$1,134,589
Out-of-State Undergraduate	\$3,429,807	\$181,136	\$288,614
In-State Graduate	\$2,028,330	\$107,120	
Out-of-State Graduate	\$262,617	\$13,869	
In-State 1st Professional			
Out-of-State 1st Professional			
<b>Total</b>	<b>\$26,948,467</b>	<b>\$1,423,203</b>	<b>\$1,423,203</b>
<b>In-State Sub-Total</b>	<b>\$23,256,043</b>	<b>\$1,228,198</b>	<b>\$1,134,589</b>

**NOTE:** It was decided to utilize out-of-state tuition revenues above those budgeted to fund additional out-of-state scholarships in an attempt to maintain/increase out-of-state enrollment.

<b>2011-12 (Estimated)</b>			
<b>T&amp;F Used for Financial Aid</b>	<b>Gross Tuition Revenue</b>	<b>Tuition Revenue for Financial Aid</b>	<b>Distribution of Financial Aid</b>
In-State Undergraduate	\$22,713,460	\$1,106,502	\$1,241,711
Out-of-State Undergraduate	\$3,663,574	\$178,474	\$150,000
In-State Graduate	\$1,931,160	\$94,078	
Out-of-State Graduate	\$259,816	\$12,657	
In-State 1st Professional	\$0		
Out-of-State 1st Professional	\$0		
<b>Total</b>	<b>\$28,568,010</b>	<b>\$1,391,711</b>	<b>\$1,391,711</b>
<b>In-State Sub-Total</b>	<b>\$24,644,620</b>	<b>\$1,200,580</b>	<b>\$1,241,711</b>

<b>2012-13 (Planned)</b>			
<b>T&amp;F Used for Financial Aid</b>	<b>Gross Tuition Revenue</b>	<b>Tuition Revenue for Financial Aid</b>	<b>Distribution of Financial Aid</b>
In-State Undergraduate	\$24,887,690	\$1,245,592	\$1,415,704
Out-of-State Undergraduate	\$3,999,064	\$200,147	\$150,000
In-State Graduate	\$2,112,660	\$105,736	
Out-of-State Graduate	\$284,308	\$14,229	
In-State 1st Professional	\$0		
Out-of-State 1st Professional	\$0		
<b>Total</b>	<b>\$31,283,722</b>	<b>\$1,565,704</b>	<b>\$1,565,704</b>
In-State Sub-Total	\$27,000,350	\$1,351,328	\$1,415,704
Additional In-State	\$2,355,730	\$150,748	\$173,993
Additional In-State from Fin Plan		<b>\$173,993</b>	

<b>2013-14 (Planned)</b>			
<b>T&amp;F Used for Financial Aid</b>	<b>Gross Tuition Revenue</b>	<b>Tuition Revenue for Financial Aid</b>	<b>Distribution of Financial Aid</b>
In-State Undergraduate	\$27,294,460	\$1,399,060	\$1,608,012
Out-of-State Undergraduate	\$4,374,780	\$224,243	\$150,000
In-State Graduate	\$2,315,940	\$118,711	
Out-of-State Graduate	\$312,116	\$15,998	
In-State 1st Professional	\$0		
Out-of-State 1st Professional	\$0		
<b>Total</b>	<b>\$34,297,296</b>	<b>\$1,758,012</b>	<b>\$1,758,012</b>
In-State Sub-Total	\$29,610,400	\$1,517,771	\$1,608,012
Additional In-State	\$2,610,050	\$166,443	\$192,308
Additional In-State from Fin Plan		<b>\$366,301</b>	

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



# Six-Year Plans (2011) LONGWOOD UNIVERSITY

Approved by Board of Visitors September 10, 2011

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

Items	2011-2012		2012-2013			2013-2014			2014-2015	2015-2016	2016-2017	2017-2018
	Student Charge	Total Revenue	Student Charge	Rate Increase	Total Revenue	Student Charge	Rate Increase	Total Revenue	Total Revenue	Total Revenue	Total Revenue	Total Revenue
<b>E&amp;G Programs</b>												
In-State Undergraduate	\$5,940	\$22,713,460	\$6,510	9.6%	\$24,887,690	\$7,140	9.7%	\$27,294,460				
Out-Of-State Undergraduate	\$17,790	\$3,663,574	\$19,440	9.3%	\$3,999,064	\$21,300	9.6%	\$4,374,780				
In-State Graduate	\$6,384	\$1,931,160	\$6,984	9.4%	\$2,112,660	\$7,656	9.6%	\$2,315,940				
Out-Of-State Graduate	\$18,192	\$259,816	\$19,896	9.4%	\$284,308	\$21,792	9.5%	\$312,116				
Other E&G NGF		\$1,510,200			\$1,710,200			\$1,760,200				
Total E&G Revenue		\$30,078,210			\$32,993,922			\$36,057,496	\$39,406,854	\$43,105,574	\$47,097,338	\$51,518,368
<b>Auxiliary Program</b>												
Undergraduate	\$12,704	\$39,988,692	\$13,316	4.8%	\$41,940,614	\$13,954	4.8%	\$44,306,896				
Graduate	\$2,880	\$333,522	\$2,976	3.3%	\$346,374	\$3,072	3.2%	\$359,226				
Other Auxiliary NGF		\$1,992,610			\$2,023,500			\$2,048,500				
Total Auxiliary Revenue		\$42,314,824			\$44,310,488			\$46,714,622	\$48,875,964	\$51,335,916	\$53,879,835	\$56,513,731
<b>Total Tuition and Fees</b>												
In-State Undergraduate	\$18,644		\$19,826	6.3%		\$21,094	6.4%					
Out-Of-State Undergraduate	\$30,494		\$32,756	7.4%		\$35,254	7.6%					
In-State Graduate	\$9,264		\$9,960	7.5%		\$10,728	7.7%					
Out-Of-State Graduate	\$21,072		\$22,872	8.5%		\$24,864	8.7%					
<b>Student Financial Aid (Program 108)</b>		\$3,784,818			\$3,784,818			\$3,784,818	\$3,784,818	\$3,784,818	\$3,784,818	\$3,784,818
<b>Sponsored Programs (Program 110)</b>		\$3,178,393			\$3,178,393			\$3,178,393	\$3,178,393	\$3,178,393	\$3,178,393	\$3,178,393
<b>Unique Military Activities</b>												
<b>Workforce Development</b>												
<b>Other (Specify)</b>												

# Six-Year Plans (2011) LONGWOOD UNIVERSITY

Approved by Board of Visitors September 10, 2011

## Foregone Tuition Revenue As A Result of Tuition Waivers

### Educational and General Programs

(Please provide information and add programs to the list as appropriate)

Program	2012-13					2013-14				
	In-State Undergraduates	In-State Graduates	Out-of-State Undergraduates	Out-of-State Graduates	Total	In-State Undergraduates	In-State Graduates	Out-of-State Undergraduates	Out-of-State Graduates	Total
Academic Common Market			\$35,000		\$35,000			\$50,000		\$50,000
Out-of-State Graduates				\$7,500	\$7,500				\$7,500	\$7,500
Senior Citizens	\$6,900				\$6,900	\$9,800				\$9,800
Military Dependents	\$58,000				\$58,000	\$62,000				\$62,000
Consortium	\$23,000		\$15,000		\$38,000	\$26,000		\$15,000		\$41,000
1-4-1 Exchanges			\$45,000		\$45,000			\$46,000		\$46,000
Administrative	\$38,000				\$38,000	\$42,000				\$42,000
<b>Total</b>	\$125,900	\$0	\$95,000	\$7,500	\$228,400	\$139,800	\$0	\$111,000	\$7,500	\$258,300

### Explanation of Waivers:

#### Academic Common Market

The **Academic Common Market** program allows out-of-state students to take classes at Virginia institutions because their state does not offer the particular degree program. The Southern Regional Education Board Academic Common Market program enables students to pursue out-of-state college degrees at discounted tuition rates through agreements among States and colleges and universities. Students pay in-state tuition rates; the IS/OS differential is waived.

#### Out-of-State Graduates

The **Out-of-State Graduate** waivers are a result of Longwood waiving out-of-state tuition if the student is working for a Virginia employer. These waivers are predominantly a result of teachers residing in another state but working for a Virginia school system. Students pay in-state tuition rates; the IS/OS differential is waived.

#### Senior Citizens

Under the Senior Citizens Higher Education Act, senior citizens aged 60 or over with a federal taxable individual income of less than \$15,000 per year and who have lived in Virginia for one year, can enroll as a full or part-time student in credit courses free of tuition, provided they meet the admissions standards of the University and space is available. Any senior citizen aged 60 or over can enroll in a non-credit course or audit a credit course free of tuition, regardless of taxable income, provided space is available.

#### Military Dependents

The Virginia Military Survivors and Dependents Program (VMSDEP) provides education benefits to spouses and children of military members killed, missing in action, taken prisoner, or who become at least 90% disabled as a result of military service in an armed conflict.

#### Consortium

This is a cooperative agreement between Longwood University, Hampden Sydney, SVCC, and St Paul's College. Southside Higher Education Consortium (SHEC) provides that students may enroll in courses at other "host" schools, in SHEC, while continuing to pay their "home" school. As the "host" school, Longwood waives the tuition/fees of consortium students.

#### 1-4-1 Exchanges

This references Code of Virginia: § 23-7.4:1.D. Tuition and required fees may be waived for a student from a foreign country enrolled in a public institution of higher education through a student exchange program approved by such institution, provided the number of foreign students does not exceed the number of students paying full tuition and required fees to the institution under the provisions of the exchange program for a given three-year period.

#### Administrative

Longwood offers an education benefit to its employees whereby tuition/fees are waived for one 4-credit course per semester.

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LONGWOOD  
UNIVERSITY

201 High Street  
Farmville, Virginia 23909  
tel: 434.395.2001  
fax: 434.395.2821  
trs: 711

September 30, 2011

Mr. Jim Alessio  
Director of Higher Education Restructuring  
State Council of Higher Education for Virginia  
101 N. 14th Street  
Richmond, VA 23219

Dear Mr. Alessio:

Longwood University is pleased to submit its final Six-Year Institutional Plan (2012-2018), which includes initiatives that address the Governor's goals for the Virginia Higher Education Opportunity Act of 2011. The Plan was approved by the Longwood University Board of Visitors at its September 10, 2011 meeting.

The Six-Year Institutional Plan approved by the Board of Visitors was revised from the July 1 submission. In many instances, initiatives have been scaled back or eliminated to ensure that the required tuition increases are more reasonable.

Longwood's Six-Year Institutional Plan will initiate new science, technology, engineering, and math (STEM) programs and expand existing program enrollment capacity; enhance our nursing program; increase in-state undergraduate enrollment and retention; and meet critical University needs.

Several of Longwood University's STEM initiatives have been developed to capitalize on our status as a small comprehensive university with a liberal arts foundation and a history of outstanding teacher preparation. These initiatives are geared toward producing additional STEM teachers in secondary schools and improving the STEM education of our teacher candidates as well as existing Pre-K-12 school teachers, so that they can stimulate interest in STEM programs, from elementary school through high school.

As requested, the Six-Year Institutional Plan initiatives have been priority ranked. The first 11 ranked items are reallocations of internal funds, including the \$885,800 that Longwood received last year from the General Assembly for nursing program renovations, with language in the Appropriations Act requiring that the funds be reallocated into STEM areas. These include initiating a Bachelor's degree in Environmental Science, providing an additional faculty member each for several programs whose enrollments are currently capped because of accreditation restrictions regarding how many students a faculty member can oversee in clinical settings, and two summer programs geared toward teacher candidates, classroom teachers and undergraduate research mentored by math and science faculty. The remaining two reallocations are internal funding reallocations to improve student retention and to establish a secure lab to focus on Cyber-Security technology.

Priorities 12-33 require tuition revenue to fund. The first priority for tuition, priority 12, is to replace the \$1.5 million in ARRA Stimulus Funds that were moved into this year to help off-set budget reductions. The ARRA Stimulus Funds are one-time funds that will no longer be available after this year.



Priorities 15 and 16 are two pools of money that will be used for compression, equity, merit, promotion and retention for faculty and for equity, merit and retention for classified and Administrative Professional Staff. Four years without salary increases and average faculty salaries that rank near the bottom in the Commonwealth have made these problems more acute. The University has contracted with Sibson Consulting to conduct a salary survey of faculty and staff. Their report will be used in determining how to best distribute salary increases for compression, equity, and merit.

Priorities 34-39 would require funding from the Commonwealth to implement. Our top priority in this category is for 15 additional faculty, seven in 2013 and eight in 2014. These additional faculty positions are required to maintain our medium class sizes and continue the quality of education for which we are known. To fill the gap, we have hired lecturers, some of whom do not have their terminal degrees, thus causing accreditation issues with the Southern Association of Colleges and Schools (SACS), our accrediting body. These positions will move Longwood closer to its full staffing goals of the current base adequacy funding model. The last model prepared by SCHEV (October 2010) reflected a total faculty need of 279; the University's FY12 faculty FTE is 221.

As requested, Longwood University is working with the University of Virginia and Virginia State University to provide a separate Six-Year Plan for the Virginia Logistics Research Center. This plan will include a description of each institution's specific strategies and the associated costs.

Additional information responding to "Longwood Specific Comments" is listed below:

- Please provide the methodology used to calculate the \$856,000 for the Faculty Equity, Retention and Promotion Pool.

In reviewing this initiative, the University lowered the dollar amount from \$856,000 to \$600,000. This pool of money will be used to address salary compression issues, merit, promotion, as well as to retain high-quality faculty who have been offered positions outside of the University. Some faculty may receive no increase and others will receive varying amounts – these funds will not be given to faculty across-the-board. Longwood is in the process of having a faculty and staff salary study conducted by an outside firm (Sibson Consulting) to help determine how best to allocate any funds available. The study is scheduled to be completed in 2012. Because we realize that the funding shortfalls identified by the study are unlikely to be remedied in one year, the recommendations will be phased in over a multi-year period. Using the study, we can pinpoint the most serious salary deficiencies, especially those individuals suffering from salary compression. Each faculty member's salary will be viewed individually. These funds represent "Phase I" of the project and will address the most egregious salary differences.

- Please provide the methodology used to calculate cost associated with recruitment and student success initiatives. It appears this initiative would cost approximately \$16,000 per student. Discuss the effectiveness and cost efficiency of this initiative.

The July 1 submitted Six-Year Institutional Plan, called for \$400,000 to increase student recruitment and marketing initiatives. In our final Board approved submission, we have lowered this amount from \$400,000 to \$100,000. This initiative is not intended solely for Longwood to enroll new students, but is also to help us maintain our enrollment levels as four other institutions are receiving new funding specifically to enroll additional Virginia students. Two of those institutions,

Mr. James Alessio  
Page Three  
September 30, 2011

VirginiaTech and James Madison University, have been identified through student surveys as direct competitors. Since these funds are to help sustain existing enrollment levels as well as to meet new enrollment projections, a price per student cannot be assigned to the \$100,000 cost because the exact number of students impacted is unknown.

Historically, Longwood's in-state enrollment has been approximately 95 percent in-state students. With a projected decrease in Virginia high school graduates in the coming years and this new initiative for other institutions to enroll Virginia students, we are concerned about the potential negative impact on Longwood's in-state enrollment. Additionally, an outside marketing firm recently conducted a survey that showed a significant number of people in Virginia are not familiar with Longwood University and our programs. This coupled with the possible threat of a loss of potential students has raised concerns and the Board supports the University embarking on new recruitment and marketing strategies. The \$100,000 that the plan sets aside for this initiative will assist in paying the overall costs for the new strategies.

Currently, Longwood has a task force that is developing an "Academic Strategic Plan," which will be completed in the Spring of 2012. While the Academic Strategic Plan will drive the development of new academic programs in the future, the work that was done by the Vice Presidents and Deans on the Six-Year Institutional Plan has been beneficial to the Academic Strategic Plan process.

If you have further questions or need any additional information related to Longwood University's Six-Year Institutional Plan, please contact me.

Sincerely,

A handwritten signature in blue ink that reads "Patrick Finnegan". The signature is fluid and cursive, with a long horizontal stroke at the end.

Patrick Finnegan  
President