BOARD OF VISITORS
- March 2015 -

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

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BOARD OF VISITORS
March 2015

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BOARD OF VISITORS
March 2015

Schedule of Events and Public Meeting Agenda
Lancaster Hall
Stallard Board Room
(unless otherwise noted)

Thursday, March 26

7:00pm – 8:30pm	Optional Board Dinner, *Longwood House*

Friday, March 27

8:30am – 9:00am	Continental Breakfast
9:00am – 9:30am	Rector's Welcome and Consent Agenda
9:30am – 10:00am	President's Report and Officer Briefing on Missing Student Anjelica "AJ" Hadsell
10:00am – 12:00pm	Task Force Meetings and Preview Tours of Maugans Alumni Center
12:00pm – 2:00pm	Working Lunch and Master Planning Discussion – Cooper, Robertson & Partners
2:00pm – 3:30pm	Reports of Representatives to the Board
3:30pm – 4:00pm	Faculty Salary Report, Dr. Abrams
4:00pm – 5:00pm	Discussion and Deliberation
– Break –	
5:00pm – 6:00pm	Reception with LCVA Advisory Board, *LCVA*
6:00pm – 8:30pm	Board Dinner with Faculty Engaged in General Education Renewal Process, *Longwood House*

Saturday, March 28

8:30am – 9:00am	Continental Breakfast
9:00am – 10:00am	Executive Session
10:00am – 11:30am	Discussion and Deliberation
11:30am	Adjourn
11:45am – 12:00pm	Ceremonial Groundbreaking for Upchurch University Center
12:00pm – 1:30 pm	Luncheon in Rowe Gallery in honor of Mrs. Elsie Upchurch '43

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Overview Message from the President

copy follows in this tab, as distributed March 19, 2015

From: Reveley IV, Taylor
Sent: Thursday, March 19, 2015 11:25 AM
To: Reveley IV, Taylor
Subject: Longwood --- March BOV Meeting

Friends,

As spring comes after a hard winter, it will be wonderful to have you on campus next week, as well as to have several of you on campus in the immediate days ahead for Foundation and Alumni Board meetings and events. Your briefing materials will arrive tomorrow. Campus struggles right now with the fact that our student AJ Hadsell continues to be missing. As you know, I travelled to meet personally with Norfolk officials this week --- and we all hold out hope, as I mentioned in my message to the campus community last week, pasted in again below.

We also give the utmost thought to the guidance and spirit of Title IX, deeply true to our roots as a pioneer in women's education (counting so many of my own family as women alumni) and deeply true to constitutional prerogatives and due process, as particularly appropriate and necessary for a public institution.

And we celebrate our new provost --- the University of Richmond's Dr. Joan Neff, who will join us for a portion of the time you are here next week. Dr. David Lehr, chair of the Faculty Senate, led the search process truly splendidly.

We also look to the future across the entire University. At the upcoming meeting, we will give continued attention to the master planning process, to the process of renewing general education, and to the perpetual good work of welcoming students to Longwood and nurturing them through, among many other key subjects.

See you soon --- and thanks, as always,

Taylor

From: Reveley IV, Taylor
Sent: Tuesday, March 10, 2015 4:02 PM
To: All Faculty; All Faculty, Staff & Contract Employees
Subject: A Message about Our Missing Student

Dear all ---

Our tight-knit community is bearing grave thoughts on the return from spring break. As many of you know from campus updates and media, one of our fellow Lancers is missing. Freshman student Anjelica "AJ" Hadsell went home to Norfolk over break and then was reported missing there. We had hoped she might return to school with the resumption of classes --- but the start of classes now is passing by. We remain hopeful.

Norfolk police are leading the investigation, and we are cooperating actively and closely. We will be giving updates whenever appropriate, mindful always not to do so in a way that would interfere with the police's work. You can help by spreading the word, and if you have information on AJ's whereabouts please immediately contact Norfolk police at 757-664-7026.

Please keep AJ and her family in your thoughts and prayers. What makes Longwood so deeply special is the care we have for one another.

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LONGWOOD UNIVERSITY
BOARD OF VISITORS
December 4-5, 2014
Minutes

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

Thursday, December 5, 2014

Call to Order

The Longwood University Board of Visitors met on Thursday, December 4 in the Stallard Board Room in Lancaster Hall. From approximately 10:30 a.m. until noon some members attended an optional financial overview session on university finance and budgeting lead by Vice President Ken Copeland.

The meeting was called to order shortly after 1 p.m. by Rector Colleen Margiloff.

Members present:

Mr. Stephen Mobley
Mr. Brad Schwartz
Mrs. Shelby Jones Walker
Mr. David Hallock
Mrs. Katherine Busser
Mrs. Marianne M. Radcliff
Mrs. Eileen Anderson
Mrs. Colleen McCrink Margiloff
The Hon. Robert S. Wertz, Jr.
Mr. Eric Hansen
Mr. Thomas Johnson
Mrs. Pia Trigiani

Also present:

President W. Taylor Reveley IV
Dr. Kenneth Perkins, Provost and Vice President for Academic Affairs
Mr. Kenneth Copeland, Vice President for Administration and Finance
Ms. Victoria Kindon, Vice President for Strategic Operations
Dr. Tim Pierson, Vice President for Student Affairs
Mr. Troy Austin, Director of Athletics
Ms. Courtney Hodges, Interim Vice President for Commonwealth Relations
Mr. Justin Pope, Chief of Staff
Mrs. Kay Stokes, Executive Assistant to the President
Dr. Audrey Church, Faculty Representative
Mr. Joe Gills, Student Representative

Mr. Bart Mitchell, Longwood University Foundation
Ms. Ella Maokhamphiou, Internal Auditor
Mr. Cameron O'Brion, Office of the Attorney General

Rector's Welcome and Approval of Minutes and Consent Agenda

Mrs. Margiloff welcomed the Board and requested a motion to approve minutes of the September meeting. Mrs. Walker moved to approve the motion, Mr. Hansen seconded and the motion was approved unanimously.

Mrs. Margiloff requested a motion to approve the consent agenda, including standard edits, updates, and amendments to University policy, procedure and planning, specifically regarding: acquisition of property; financing of student housing through the Real Estate Foundation, including the new residence halls approved for ARC Quad; ARMICs internal control; SWaM procurement; internal audit; the policy regarding operation of golf carts; and the clarification in definitions in the policy on weapons on campus. Mrs. Busser moved to approve the motion, Mr. Mobley seconded and the motion was approved unanimously.

President's Report and Discussion

President Reveley reported positive news on enrollment, with Longwood unusual among Virginia public universities in reporting enrollment increases this fall. He noted new software to help with retention efforts made possible by a gift from Colleen and Will Margiloff. He also expressed the university community's enthusiasm following the previous night's come-from-behind men's basketball win, and a national honor received by the campus police department.

The president led a discussion of Title IX issues and reminded the Board that, despite its challenges, the law requiring a campus response remains an important supplement to the criminal justice system. Tim Pierson provided an update on Title IX education and enforcement issues, saying he believes there has been a substantially increased level of understanding and conversation about the issue on campus. Overall, he believes that conversation has been healthy. He emphasized that there is constant communication and interaction between his office, campus police and town police. Title IX coordinator Jen Fraley also spoke briefly, emphasizing that one effect of the law has been to provide more resources to a broader number of students, which has been positive.

Mrs. Busser brought up recent events at the University of Virginia and the importance of a strong statement from university leadership that sexual assault will be handled firmly. President Reveley said he believes current policies are strong. Ms. Trigiani said the goal should be continued education and effort, and to encourage reporting, and that an increase in Title IX reports is a sign of progress. Mr. Gills said he believes President Reveley has been communicating with students well over the course of the semester and that he believes students

feel comfortable availing themselves of the resources on campus. President Reveley suggested a statement to the campus community on behalf of himself and the rector.

Victoria Kindon provided an update on admissions trends, including an increase in fall deposits, visits to campus (up 10 percent) and applications (up 17 percent). She discussed how the software made possible by the Margiloffs' gift will be deployed to identify factors that affect student retention.

Dick Bratcher provided an update on campus construction and the master planning process, summarizing some of the themes that have emerged from community and constituency meetings thus far. He said there has been a call for Longwood to take a leadership role downtown. Most of the hundreds of comments about Longwood and the direction it is moving have been positive.

Ken Copeland gave an overview of the proposed dining and housing fees for the coming years; the proposed increase is 2 percent and the housing increase 4 percent, necessitated by the loss of revenue from the Cunninghams. Housing costs will remain below average for Virginia public universities. He also discussed proposed course fees. Mrs. Margiloff asked for a motion to approve the proposed fee schedule. Mrs. Busser moved to approve the motion, Mr. Mobley seconded and the motion was approved unanimously (a copy of the fee schedule is attached as Appendix 1).

Nancy Shelton provided a brief update on behalf of Alumni Relations and the Alumni Association.

Courtney Hodges provided an update on ongoing advancement efforts in conjunction with Royall & Co., particularly the focus on annual giving, which is up 16 percent year-to-date, and on gift stewardship to ensure donors remain engaged.

Ella Maokhamphiou provided an update on internal audit operations. Five audits are nearing completion, and she is moving forward with a network vulnerabilities audit which she expects to take place in the first quarter of calendar 2015.

Reports of Representatives to the Board

Joe Gills provided an update on voter registration drives, a visit by himself and other students to the White House to discuss campus safety, and Title IX and bystander intervention training efforts.

Audrey Church provided a brief faculty update on issues including the provost search and campus master plan. She said the faculty wished to convey from the faculty the importance of a proper balance between athletics and academics, and encouragement wherever possible not to remove trees. She said faculty would be pleased to see that faculty and staff compensation will be used as a principal metric in assessing the strategic goals of the university, and is appreciative

of President Reveley's leadership style. "We've transitioned from him being the 'new' president to being 'our' president," she said.

Bart Mitchell offered a brief report on behalf of the Longwood University Foundation, noting spending is up roughly 11 percent and total assets remain about $75 million.

The meeting broke from approximately 3 p.m. until 3:20 p.m.

Courtney Hodges and Victoria Kindon offered further perspective on efforts to drive advancement efforts, and the work with Royall. Emily O'Brion was introduced as new director of government relations.

Troy Austin provided an update on athletics, including his own appointment on the NCAA Division 1 Council, the success of the benefit auction, and some recent personnel changes related to compliance.

President Reveley addressed the issue of Centra Hospital and its forensic nurse staffing. He emphasized that the issue is common to many smaller communities and that Centra has reasonable concerns for wishing to continue to offer its complete forensic exams only in Lynchburg, but that he would continue to advocate for some kind of on-call system so that Longwood students would not have to travel to Lynchburg. There was a discussion among Board members, with suggestions made including looking to Richmond-area options. Mr. Ward emphasized the importance of the issue to broader rural communities, not just Longwood and other universities. At the close of the afternoon session, Board members discussed with Ms. Maokhamphiou the substance of current work by the office of internal audit and planning for audit committee activities going forward.

There being no further business, the meeting was adjourned at 4:07 p.m.

Friday, Dec. 5, 2014

The Board assembled on Friday at 9 a.m. in Stallard Board Room. All members from the previous day were present except Mrs. Busser, as were all the vice presidents, Audrey Church, Joe Gills and Ella Maokhamphiou.

Welcome

President Reveley praised the Longwood police for their recognition as the No. 16 national ranking among university police departments in a recent magazine report. Chief Robert Beach offered comments.

Town Matters

Mayor David Whitus '83 and Town Manager Gerry Spates were introduced and addressed the Board. Mr. Whitus praised his relationship with Mr. Spates, who noted he has worked with Longwood staff since the time of President Willett and has found President Reveley particularly easy to work with. They addressed questions concerning capital improvements, joint participation in the Master Plan, and parking issues. Mr. Spates noted there has been substantial improvement in the off-campus behavior of Longwood students and praised the work of Tim Pierson and Chief Beach.

Composite Financial Index

Ken Copeland made a presentation on the Composite Financial Index and its use as a metric in the strategic plan (a copy of the briefing materials on the CFI is included as Appendix 2).

General Education

Sharon Emerson-Stonnell, professor of mathematics, and Lara Ferguson, professor of history, presented an overview of the process for renewing and revising general education, and an update on the progress of the committee, and answered questions. The faculty committee will continue with its work through the current academic year and next, with a timetable to begin piloting new general education courses in the fall of 2016.

Strategic Priorities Task Force meetings

After President Reveley reviewed the purpose behind small tasks forces comprised of BOV members and vice presidents, the task forces met for the first time (the roster of each group is included as Appendix 3):

Retention

Regional prosperity:

Governance

Foot Traffic

Strengthening the University

National Marketing

When the Board reconvened, each group briefly summarized its initial discussions, including the prospect of creating a broader system of supporting entities for various parts and areas of the university. There was a brief update from Victoria Kindon on Longwood's work with the branding firm Free Range, and from President Reveley on the provost search.

There being no further business, the meeting was adjourned at 1:45 p.m.

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

The items that follow concern regular updates anticipated since the beginning of the calendar year to the university Timely Warning and Missing Student policies, per regulatory guidance under the Campus Crime Act (Clery); planning and enrollment projection materials for the MBA program, as required by SCHEV; as well as resolutions approved by the BOV Executive Committee at its February meeting in honor of Nancy Shelton and Gerald Spates; and the updates then approved to the University Sexual Misconduct Policy. Included here also is the update on Internal Audit activity.

Policy

TIMELY WARNING POLICY

I. PURPOSE

It is the responsibility of the Longwood University Police Department (LUPD) to notify the University community in a timely manner when a reported crime or incidents occurs on or near the University campus which represents an ongoing or serious threat to the University community.

This policy seeks to ensure that the university community is notified promptly with accurate information in the event of a reported crime in which there could be an ongoing or serious threat to the community or additional incidents in the future.

II. TIMELY WARNING/ CRIME ALERT INCIDENTS

The university shall issue a timely warning when the Longwood University Police Department identifies a reported crime or incidents in the core campus geography or areas immediately adjacent to the campus that poses an ongoing threat to students, faculty and staff and guests. The decision to inform the university community shall be based upon known facts of an incident. A map of the core campus geography can be found at http://www.longwood.edu/about.htm then click on maps and directions.

The Vice-President of Student Affairs, in consultation with the Chief of Police or designee, shall decide whether to issue a timely warning.

The university shall notify the university community of crimes that represent an ongoing threat to students, faculty and staff and guests unless issuing a notification will, in the professional judgment of responsible authorities, compromise efforts to assist a victim or to contain, respond to or otherwise mitigate the emergency. They may stem from reports to university police or other state or local agencies. Those crimes that prompt a timely notification include, but are not limited to:

a. Murder
b. Non-Negligent Manslaughter
c. Forcible sexual Offenses
d. Robbery
e. Aggravated Assault
f. Arson
h. Burglary
i. any emergency situation that may pose a threat to the health and safety of the students, faculty, staff and visitors of the Longwood community.

Notification Process

1. The Chief of Police and/or designee will inform the Vice-President of Student Affairs of any crime that may pose an ongoing threat to the personal safety of students, faculty, staff or visitors.

2. The Chief of Police and/or designee will contact the Longwood University Public Information Officer and draft the message that will be sent out and coordinate any updates as needed.

3. Timely warning notices shall include the following information:

a. nature of the crime or immediate threat;
b. location, date and time of crime or immediate threat;
c. description of any suspect(s);
d. action recommended for university community;
e. Crime prevention information, and;
f. Contact number for the Longwood University Police Department and the Farmville Police Department.

4. When issuing a timely warning one or more of the following communication channels may be used as appropriate:

- An email message sent to everyone with a university e-mail account.
- Posting on the university emergency communications website at http://alerts.longwood.edu/ which will be updated with information and instructions about how to respond in an emergency situation.
- Text messaging, which is also the primary communications channel for any closings and delays for inclement weather.
- Social media such as Twitter and Facebook.

Policy

MISSING STUDENT NOTIFICATION POLICY

I. PURPOSE

To establish guidelines which describe the investigation of missing persons and making appropriate entries into VCIN and NCIC and to the Residential Education Coordinator (REC) on-call.

II. PROCEDURES

Student registration Process

Students are encouraged to utilize forms prepared and made available by the university to provide emergency contact information. The University will ensure that all students are able to update their contact information when needed. These procedures and forms are communicated routinely to students during: new student orientation, residence hall meetings and the start of fall and spring semesters. Notification of this policy is referenced in the annual Campus Security report and the Longwood University website.

Students must be reassured that their emergency contact information will be:

1) Registered confidentially
2) Accessible only to authorized campus officials
3) Disclosed only to law enforcement personnel for the sole purpose of their investigation.

Missing Student Notification

All students will have the opportunity and means to identify an individual or individuals to be contacted in an emergency, when the university determines that a student is missing. Upon receipt of a complaint, report or expression of concern about a missing student, the Longwood University Police Department (LUPD) will undertake all reasonable efforts and attempts to contact the student. A student will be deemed missing when contact has not been made for more than 24 hours but the time period may be accelerated and appropriate intervention will occur sooner when:

- There is evidence of possible criminal activity in connection with the student's disappearance;
- The student, regardless of age, has known or suspected physical/mental disability or condition or is otherwise compromised and there is thought to exist risk of an immediate

danger to his/her safety or the safety of others. The student, regardless of age, is believed to be in the company, voluntarily or involuntarily, of another.

When the missing student is located, LUPD will contact the student to offer any appropriate support, as well the emergency contacts and/or parents to confirm the student has been located.

If the investigation is unsuccessful in locating the missing student, LUPD will continue to investigate according to established police procedures.

MBA Program (CIP 52.0201)

Analysis of the Enrollment

The Longwood MBA program was converted from a face-to-face program to an on-line program in 2010. Since its conversion, the program's enrollment has demonstrated three trends: (1) the program is experiencing a steady increase in headcount enrollment for the recent two years, (2) an overwhelming large number of part-time students enrolled in the program (see Table 1 below); and (3) a diverse enrollment pattern indicated by various types of enrollment status. For instance, we have students enrolled in spring, enrolled as "degree seeker", "non-degree seeker", or enrolled for one credit to maintain "graduate student" status without taking any course for a semester.

Table 1: Longwood MBA Headcount Enrollment for Fall Semester 2012 & 2013

Year	Fall Headcount (total admitted students)	Sub-Total by Type	
12-13	12	Full-Time	0
		Part-Time	12
13-14	16	Full-Time	0
		Part-Time	16
14-15	18*	Full-Time	0
		Part-Time	18

* Includes two students maintaining continuous enrollment with GRAD 698.

While recognizing the fact that increases in the program's headcount enrollment indicates a continuous market need for the program, we also realize that the diverse enrollment pattern constitutes a challenge to our enrollment reporting. Specifically, the overwhelmingly large portion of part-time students has had and will continue to have a decisive impact on the program's FTE enrollment, and SCHEV-HC and SCHEV-CE files cannot capture all types of students who enroll in the program at various points of time and under various circumstances. Table 2 below illustrates the headcount enrollment for spring semester 2014 by type. Between spring 2013 and spring 2014, the total headcount enrollment increased by 5 students to a total of 21 students.

Table 2: Longwood MBA Student Headcounts by Type for Spring 2013 and 2014

Type of Student	Spring 2013	Spring 2014
Degree Seeker	16	16
Enrolled for 1-credit to maintain continuous enrollment status	0	2
Non-Degree Seeker	0	3
Total Headcount	**16**	**21**

Historically, the College of Business and Economics has gone through several administration changes since the original proposal for the MBA program was submitted in 2005. Between 2005 and 2008, there were three deans in the position. Stability in the college's administration and the program coordination

did not come until 2008 when our current Dean and MBA program coordinator were hired. Likewise, leadership in Longwood's College of Graduate and Professional Studies has been in flux until recently.

The original proposal for the MBA program projected reaching a fall headcount enrollment of 30 and an annual full-time equated student enrollment of 20 in Year 1 (2006-07), with growth to 60 in fall headcount enrollment and 40 in annual full-time equated enrollment by Year 2 (2007-08) and forward. Since then, the economy has seen the worst downturn since the Great Depression, and MBA programs have felt the pinch in two ways – full-time students do not want to put their careers on hold while they pursue graduate degrees and part-time students who had enjoyed the financial support of their employers found that many companies were no longer willing to pay for their graduate education. For a new program just getting started, these factors have adversely affected our growth.

As mentioned above, in the two quantitative measures used by SCHEV for this productivity study, the numbers presented in the enrollment measure appear to be insufficient in terms of capturing the complete picture of the enrollment of the Longwood MBA program. This program was originally designed for working-adults. We often have students who take classes in the fall as a non-degree seeking student and do not enroll in the MBA program until the spring semester. The fall headcount enrollment does not capture these students until the following year which tends to delay growth reported in a 5-year rolling average. In addition, the course enrollment number does not capture a student who is enrolled in the MBA program, is currently not taking classes, but is maintaining continuous enrollment through a one-credit hour continuous enrollment course.

For the degree production, we graduated 13 students in 2013 and five in 2014. For 2015, there will be eight graduates. Thus, two of the last three years, this program exceeded the SCHEV standard for a five-year average of seven MBA graduates.

Populations Served

Although the MBA program is delivered online, we primarily serve students in the Commonwealth, particularly the Southside Virginia area. Currently, six of our students live in Southside Virginia, five in the Richmond area, two in Southwest Virginia, one each in Charlottesville, Northern Virginia, and Tidewater and one out-of-state.

All of our students are earning their degrees on a part-time basis while they work full-time jobs. This program provides them with the opportunity to fit their studies into their already busy personal and professional lives. It also allows them to continue their careers while they earn their MBA degrees.

Serving working adults is consistent with Longwood's mission, especially serving those in underserved areas of the Commonwealth (Southside and Southwest Virginia). At the same time, serving primarily part-time students has a negative impact on our full-time equivalent enrollment headcounts.

Quality of the Program

Longwood's online MBA is a quality program and is publicly recognized as such:

- The program is accredited by AACSB International. Fewer than five percent of the schools of business worldwide have earned and maintained this designation.

- In January 2014, the program was ranked #62 on *US News & World Report's* ranking of online graduate business programs. Of the 239 online graduate business programs that are on that list, only one other Virginia university ranked higher than Longwood – JMU ranked #9, George Mason ranked #75, Regent ranked #102, and Liberty #122. This program was ranked very high on three out of the five measures that make up the ranking: ranked #5 on the measure "Faculty Credentials and Training," #16 on "Admission Selectivity," and #31 on "Student Engagement."

- The program is recognized as a good value. Longwood MBA is ranked #31 on GetEducated.com's "Best Buy" list of AACSB Online MBA Programs. This list recognizes programs that are accredited by AACSB, but cost less than the median cost of those MBA programs. There were no other Virginia schools that ranked above us on this list.

- Table 3 below illustrates the difference in degree production for the similar programs that are offered by Longwood and other selected peer institutions in the Commonwealth. When we
    - Use the same set of data provided by SCHEV-Research, the five year average FTE enrollment and the number of degree awarded,
    - Measure the ratio of the number of degrees awarded to the number of FTE enrolled in the program,

  Longwood's MBA has better performance.

Table 3: Comparison of the Ratio of Degree Awarded to FTE enrollment

School	MBA (520101)
Longwood University	5.8/9.5=66.4%
University of Mary Washington	71.6/134.2=53.3%
Radford University	39.2/60.3=65.0%
Virginia Commonwealth University	126.2/226.1=55.8%
Old Dominion University	85/156.3=54.4%
James Madison University	28.8/52.3=55.1%

After a lengthy and thorough discussion among our faculty, professional staff and administration, we reached the following conclusions:

- This program is productive and has a great potential to grow.
- To sustain, the leadership of the program needs to develop a reasonable action plan and take measures to improve our current practice in marketing and recruitment.

Our Plan for Improving Enrollment

Our action plan for addressing the enrollment issue consists of four components: (1) adding a real estate concentration, (2) offering a five-year and full-time dual degree (BA-to-MBA) option to current business and non-business majors, (3) intensifying the marketing efforts to increase public awareness of the program, and (4) employing new strategies in recruitment practice.

(1) Adding a Real Estate Concentration

In the current MBA marketplace, there is a trend toward specialization. A December 2013 article on the AACSB Data and Research Blog, "Significant Strides in Specialized Master's Enrollment," reports that over the past five years (2008-09 to 2012-13), for all AACSB accredited schools in North America, MBA enrollment has decreased somewhat (-3%) while enrollment in specialized Master's programs has seen a 38% increase.

When deciding to add a concentration in real estate area, we looked at three factors, 1) the importance of the real estate industry, 2) the market need for professionals with advanced training in the field, and 3) the strength of our curriculum and faculty.

The Importance Real estate is one of the biggest industries in our economy and it continues to be a major part of business. In Virginia, the real estate industry is the third largest contributor to the state's economy, after the government and professional and business services (Regional Perspectives: Virginia Economic Outlook, JPMorgan Chase, December 26, 2013).

The Market Need There is general acceptance today that more technical expertise in real estate is necessary in order to succeed in the industry and graduate education is commonly a prerequisite to advancing in many aspects of real estate. Like many industries, real estate is moving in the direction of "big data," particularly in the commercial sector. To deal with the complexity of the field, today's real estate professionals require advanced training to prepare them to operate in increasingly technical and interrelated areas. Business degrees with real estate concentrations generally provide students with the opportunity to pursue a general management degree, but to also specialize in some segment of the real estate industry. This sentiment is supported by the January 17, 2013 *Business Week* article, "Real Estate Training is Hot for MBAs," which notes that real estate is a hot new growth area for business schools.

In addition, according to Deloitte's 2014 Commercial Real Estate Outlook (Deloitte Center for Financial Services), talent is becoming a key concern for commercial real estate executives and boards. Deloitte points to an age gap in the industry. With the average age of an employee in the real estate industry at 40 – 50 years old, by 2020 over 65% of senior leaders will have retired and the next level of employees is not prepared to fill the gap. Deloitte's report states that developing the next generation of leaders should be a top priority for the industry and points out that the increase in graduate real estate programs is important to filling this gap.

Further, as part of our due diligence, in the summer of 2013, Dr. Bennie Waller, Dr. Scott Wentland, and Mr. Bill Baxter visited executives at several commercial real estate firms (Thalhimer/Cushman & Wakefield, Colliers International, Porter Realty, CB Richard Ellis, and Highwoods Properties) in the Richmond area to discuss our plans and collect their input. During these discussions, these executives confirmed our analysis that there was a need for a program for real estate professionals that would provide:

- a broad business foundation to prepare real estate professionals for leadership positions,
- a focus on ethics and values-based leadership,
- the development of business "soft skills" (non-technical skills such as critical thinking, communications, etc.)

Based on this input, it was clear that there was a market for an MBA with a concentration in real estate, which would be more aligned with the type of product executives in the industry described.

Our Strength The strength of this program is especially evident in both its curriculum and faculty's credentials and expertise. Like many other industries, there are various licensing requirements and industry designations for real estate professionals that require specialized education (such as a broker's license or the Certified Commercial Investment Member designation). Based on the courses that we have developed, with completion of the necessary filings to ensure these courses meet the educational requirements for the certifications, we can provide an opportunity for our students to achieve their goals for maintaining the credentials for their business practice while at the same time advancing their professional career. Our recent conversations with the commercial real estate professionals in the Richmond area, as well as conversations with the executive directors of the Virginia Association of Realtors and the Richmond Association of Realtors confirm the idea that this newly added concentration will enable Longwood's online MBA to offer an attractive incentive to people looking to move up their career ladders.

A real estate concentration leverages our faculty strength in the real estate industry. Several of our faculty members are nationally recognized and highly visible in the field of real estate. Dr. Bennie Waller, Dr. Xun Bian, Dr. Ray Brastow, and Dr. Scott Wentland have published extensively and successfully in the top journals in the academic real estate literature. Their work has been recognized numerous times by the American Real Estate Society (ARES), the leading real estate research and education organization globally. In addition, Dr. Waller's research has been reported on extensively by leading publications and media such as *The Wall Street Journal*, and Dr. Wentland and Dr. Brastow's work has been featured in numerous other media outlets, creating greater visibility for Longwood and our expertise in real estate.

Finally, with the newly added concentration in real estate, our MBA program will be the first online MBA program offering a real estate concentration in the Commonwealth of Virginia. As mentioned in above sections, our extensive discussion with industry professionals confirmed that this program will generate the most interest and allow us to serve a wide market of working professionals, as well as underserved populations in rural areas of Virginia who do not have easy access to the few residential programs now being offered within the state.

The real estate concentration was implemented in fall 2014, after receiving approval from Longwood's EPC and faculty senate in late 2013. Two students are currently in the program.

(2) Offering a Five-Year and Full-Time Dual Degree Option to both Business and Non-Business Majors

As part of Longwood's effort to offer more five-year dual degree options to its students, a five-year dual degree in Business Administration will open another opportunity for our program to reach a broader population and recruit more students into our program.

A May 2013 report by Hanover Research, "Trends in Accelerated MBA Programs," indicates that accelerated degrees are increasing in popularity and notes that this is especially true for graduate degrees, with one-year MBA programs becoming more popular in the US. The report goes on to say that students are interested in these degrees for both the cost and time savings that they provide,

particularly for students eager to begin work, but who realize the competitive edge in the marketplace that an advanced degree provides.

In fall 2013, the MBA coordinator began to work with the Liberal Studies program to promote this option to those Liberal Studies majors who decided not to pursue teaching licensure. Working with the director of liberal studies, we've outlined a curriculum path for these students that will prepare them for admission to the MBA program. We should see increase in enrollment from these students over the next three to four years. In addition, efforts to recruit Longwood business majors and minors have also been made.

(3) Intensify the Marketing Efforts to Increase Public Awareness of the Program

Longwood serves the nation and the commonwealth as a regional comprehensive university. Because of the relatively young age of the program, it is expected that the level of its visibility and public awareness of the program is low. It will take time and effort to get where we want to be. As we seek to increase enrollment in the MBA, we must first intensify our marketing effort for the program.

Application volumes hinge on the success of school efforts to build a pipeline of future students. The timeline from when a prospect starts to consider an MBA until when he/she applies can be up to two years long. We continue to refine our marketing and recruiting efforts to build a stronger pipeline. During the 2013-14 year we spent over $53,000 on PR, marketing, and recruiting. In addition, $8,750 was donated by our corporate advisory board members to support advertising of the new real estate MBA. This level of spending is beyond that of the original MBA proposal.

As a state institution with a regional focus of serving Southside Virginia, most of our advertising is focused in the Commonwealth. In 2014, we added the latest technologies to our mix of media, applying strong digital marketing tactics (targeted display, site retargeting, a landing page, and pay-per-click) to our marketing program. As a result, the number of inquiries about the MBA program have almost doubled last year, 117/2014 vs 59/2013. And inquiries continue to increase -- as of November 20, 2014, we've received 101.

Marketing efforts in 2014 included the following tactics:

- Digital tactics including two months (September and October 2013) of targeted display, site retargeting and the creation of a landing page. Pay-per-click advertising (October 2013 – April 2014).
- Development and implementation of a marketing video on YouTube that is also used on our website and with other digital media.
- Advertising in the Education section of the September 2013 issue of United Hemisphere.
- Advertising in the Tuesday and Thursday editions of the Richmond BizSense e-letter during the months of September, October, November 2013 and January, February, and March 2014.
- Advertising in the print (November 2013, January and March 2014) and online (February, April, May, June 2014) editions of Virginia Business magazine.
- Advertising on Web Talk Radio's "Surviving the Credit Crisis" (January – June 2014).
- Advertising on the "Beat the GMAT" website (September – November 2013).

- Direct mail to Longwood business majors and minors, GMAT takers, and Longwood alumni. Direct mail to members of the American Real Estate Society.
- Several PR releases prepared by Longwood's Public Relations department.
- Informational visits with major commercial real estate firms and the Richmond and Virginia Associations of Realtors.
- Representing Longwood during the College programs at the NRF's 2013 Shop.org (online retailing) and 2014 Big Show conferences.
- A networking breakfast for Longwood alumni working in real estate in the Richmond area.
- Participation in college/program ranking surveys hosted by reputable agencies such as *US News & World Report* and GetEducated.com's "Best Buy" Online AACSB MBA programs. These nationally recognized ranking reports bring great visibility to our program.

In terms of recruiting in 2014, we attended a graduate school fair in southwest Virginia, meeting with students and career center staff at UVA –Wise. In addition, the MBA Coordinator visited Emory and Henry and Roanoke College. We also participated in two Longwood graduate school fairs.

A full list of planned 2014-15 marketing tactics is attached as Appendix A.

(4) Employing New Strategies to Enhance our Recruitment Practice

While continuing our marketing efforts to build a visible presence in the nation, region, and Commonwealth, we plan to employ new strategies to enhance our recruitment practice. The actions to be taken include, but are not limited to,

- Expanding on last year's efforts to participate in graduate school fairs at other colleges throughout Virginia;
- Actively recruiting at the various commercial real estate and realtor associations where we have developed relationships, setting up information tables in their offices and hosting coffees during their professional gatherings and sales meetings;
- Continuing to work with Longwood's Office of Alumni Relations to host/attend additional networking breakfasts and events for alumni and real estate professionals;
- Reach out to those undergraduates who are currently majoring in business administration and liberal studies and encourage them to consider the new degree advancement options before they leave Longwood.

New Enrollment Projection

We expect that the efforts mentioned above will have a positive impact on our enrollment. Table 4 below presents our projection of the headcounts for the next five years.

Table 4: Projected Enrollment for 2014-2019

Fall Semester	Total Headcount
2014	18*

2015	35
2016	55
2017	86
2018	106
2019	106

* includes 2 students maintaining continuous enrollment in GRAD 698.

APPENDIX A

MBA Marketing Plan -- 2014-15

Funded Activities

Tactic	Media	Goal	Date	Cost	Notes
Surviving the Credit Crisis WebTalk Radio show sponsorship	Online	Inquiry generation	7/1/2014 - 6/31/2015	1,625.00	includes 4 interviews of our real estate faculty members per year
VA Business E-News (daily skyscraper ad)	Daily VA Business E-News	Inquiry generation	08/01/14	900.00	
VA Business E-News (daily skyscraper ad)	Daily VA Business E-News	Inquiry generation	09/01/14	900.00	
Summit Media Online Advertising Services (outreach display, landing page creation and conversion optimization, display retargeting, facebook retargeting, search engine marketing/paid search)	Online	Inquiry generation	09/01/14	5,000.00	
VA Business E-News (daily skyscraper ad)	Daily VA Business E-News	Inquiry generation	10/01/14	900.00	
Longwood Career Fairs	Face-to-Face	Inquiry generation	10/01/14	158.40	cost for 20 of each brochure and card for two fairs, Spring Fair Feb. 11, 2015
Summit Media Online Advertising Services (outreach display, landing page creation and conversion optimization, display retargeting, facebook retargeting, search engine marketing/paid search)	Online	Inquiry generation	10/01/14	5,000.00	
Richmond BizSense Daily Newsfeed (sidebar ad)	Online	Inquiry generation	10/01/14	1,350.00	skyscraper ad runs every Tuesday and Thursday
Longwood Alumni Event in VA Beach	Face-to-Face	Inquiry generation	10/22/14	225.41	cost for travel and brochures
Summit Media Online Advertising Services (outreach display, landing page creation and conversion optimization, display retargeting, facebook retargeting, search engine marketing/paid search)	Online	Inquiry generation	11/01/14	5,000.00	
Summit Media Online Advertising (IP targeting -- Longwood, VCU, ODU)	Online	Convert inquiries to applications	11/01/14	2,500.00	offer no application fee to students at these schools if they apply before January 31, 2015
Richmond BizSense Daily Newsfeed (sidebar ad)	Online	Inquiry generation	11/01/14	1,350.00	

Virginia Business magazine (1/3 p. print ad - Higher Ed issue)	Virginia Business	Inquiry generation	11/01/14	2,150.00	
Direct mail to BSBA seniors	Email	Inquiry generation	11/12/14	0.00	
Direct mail to BSBA minors	Email	Inquiry generation	11/12/14	0.00	
Send direct mail and brochures to feeder schools undergrad business programs and career centers	Letters and brochures	Inquiry generation	11/20/14	455.40	23 schools, sent 15 brochures each - postage not yet included
Brochures in Longwood UCC	Brochures	Inquiry generation	11/21/14	39.60	sent 30 brochures and cards
Summit Media Online Advertising Service (search engine marketing/paid search)	Online	Inquiry generation	12/01/14	315.00	
Direct mail to GMASS names	Email	Inquiry generation	01/01/15	600.00	target GMAT takers interested in online programs and real estate programs
Summit Media Online Advertising Service (search engine marketing/paid search)	Online	Inquiry generation	01/01/15	370.00	
Summit Media Online Advertising (IP targeting -- Longwood, VCU, ODU)	Online	Convert inquiries to applications	01/01/15	2,500.00	offer no application fee to students at these schools if they apply before January 31, 2015
Richmond BizSense Daily Newsfeed (sidebar ad)	Online	Inquiry generation	01/01/15	1,450.00	
Virginia Business magazine (1/6 p. print ad - VA Business School issue)	Virginia Business	Inquiry generation	01/01/15	1,690.00	Business School Directory and Real Estate issue
Direct mail to alumni	Email	Inquiry generation	01/15/15	0.00	attach PDF of brochure
Direct mail to Real Estate undergraduate programs at other schools	Letters and brochures	Inquiry generation	01/15/15	600.00	letter to include Bennie Waller's signature, 43 schools from IREM list, 10 brochures each
Direct mail to ARES members	Email	Inquiry generation	02/01/15	0.00	attach PDF of brochure and Real Estate rack card
Open House/Information Session	Face-to-Face	Inquiry generation	02/01/15	300.00	promote to CBE majors and minors, people who've inquired about the program, and other contacts, cost estimate for food and 50 of each brochure
Sales visits to real estate company offices	Face-to-Face	Inquiry generation	02/01/15	TBD	
Direct mail to Real Estate industry contacts in VA	Letters and brochures	Inquiry generation	02/01/15	200.00	initially send to Real Estate contacts in Richmond, 7 companies x 20 brochures and real estate cards, plus postage

Summit Media Online Advertising Services (outreach display, landing page creation and conversion optimization, display retargeting, facebook retargeting, search engine marketing/paid search)	Online	Inquiry generation	02/01/15	5,000.00	
Richmond BizSense Daily Newsfeed (sidebar ad)	Online	Inquiry generation	02/01/15	1,450.00	
Summit Media Online Advertising Services (outreach display, landing page creation and conversion optimization, display retargeting, facebook retargeting, search engine marketing/paid search)	Online	Inquiry generation	03/01/15	5,000.00	
Richmond BizSense Daily Newsfeed (sidebar ad)	Online	Inquiry generation	03/01/15	1,450.00	
Summit Media Online Advertising Services (outreach display, landing page creation and conversion optimization, display retargeting, facebook retargeting, search engine marketing/paid search)	Online	Inquiry generation	04/01/15	5,000.00	
Richmond BizSense Daily Newsfeed (sidebar ad)	Online	Inquiry generation	04/01/15	1,450.00	
Summit Media Online Advertising Service (search engine marketing/paid search)	Online	Inquiry generation	05/01/15	262.00	
Emails to inquiries for information	Email	Convert inquiries to applications	ongoing	0.00	
Emails to GMAT score submitters	Email	Convert inquiries to applications	ongoing	0.00	
Provide speakers for Real Estate industry meetings	Face-to-Face	Inquiry generation	ongoing	TBD	work with Scott and Bennie on some topics of interest
Letter from A. O'Connor/P. Barrett to accepted students	Letters	Yield	ongoing	13.50	cost based on 30 letters @$0.45 each
				53,579.31	**Total Cost**

MBA Enrollment Projections, Fall 2014 - Fall 2019									
Admitted Students, Fall 2014	16								
Students in GRAD 698, Fall 2014	2								
Total Students, Fall 2014		**18**							
Students graduating Dec. 2014	(1)		Remington						
Withdrawal, Dec. 2014	(1)		Conn						
Students admitted Spring 2015	6		These will graduate August 2016						
Total Students, Spring 2015		**22**							
Students graduating May 2015	(1)		Overstreet						
Students admitted Summer 2015	5		These will graduate August 2016						
Total Students, Summer 2015		**26**							
Students graduating August 2015	(6)		Akers, Bird, King, Mabe, Maupin, Moore						
Students admitted Fall 2015	15		These will graduate August 2017						
Total Students, Fall 2015		**35**							
Students graduating Dec. 2015	0								
Students admitted Spring 2016	5		These will graduate August 2017						
Total Students, Spring 2016		**40**							
Students graduating May 2016	0								
Students admitted Summer 2016	8		These will graduate August 2017						
Total Students, Summer 2016		**48**							
Students graduating August 2016	(18)		includes students who entered in Fall 2014, Spring 2015, and Summer 2015						
Students admitted Fall 2016	25		These will graduate August 2018						
Total Students, Fall 2016		**55**							
Students graduating Dec. 2016	(1)		Kennedy						
Students admitted Spring 2017	5		These will graduate August 2018						
Total Students, Spring 2017		**59**							
Students graduating May 2017	0								
Students admitted Summer 2017	15		These will graduate August 2018, includes 10 from Anhui						
Total Students, Summer 2017		**74**							
Students graduating August 2017	(28)								
Students admitted Fall 2017	40		These will graduate August 2019, assumes 20 PT GB, 20 PT RE						
Total Students, Fall 2017		**86**							
Students graduating Dec. 2017	0								

Students admitted Spring 2018	5		These will graduate August 2019						
Total Students, Spring 2018		**91**							
Students graduating May 2018	0								
Students admitted Summer 2018	20		These will graduate August 2019, includes 10 from Anhui						
Total Students, Summer 2018		**111**							
Students graduating August 2018	(45)								
Students admitted Fall 2018	40		These will graduate August 2020, assumes 20 PT GB, 20 PT RE						
Total Students, Fall 2018		**106**							
Students graduating Dec. 2018	0								
Students admitted Spring 2019	5		These will graduate August 2020						
Total Students, Spring 2019		**111**							
Students graduating May 2019	0								
Students admitted Summer 2019	20		These will graduate August 2020, includes 10 from Anhui						
Total Students, Summer 2019		**131**							
Students graduating August 2019	(65)								
Students admitted Fall 2019	40		These will graduate August 2021, assumes 20 PT GB, 20 PT RE						
Total Students, Fall 2019		**106**							

[Longwood Seal/Graphic Logo]

Longwood University

Honors

Nancy B. Shelton

RESOLUTION OF APPRECIATION

WHEREAS, Nancy B. Shelton began her career with Longwood University in 1972, holding positions within the Sociology Department and then dedicated forty two of service to the alumni of Longwood University; and

WHEREAS, Nancy B. Shelton has served as Executive Director of the Alumni Relations Office since 1974; and

WHEREAS, Nancy B. Shelton has been an outstandingly true and loyal employee;

NOW, THEREFORE, BE IT RESOLVED

That we, personally and on behalf of the Longwood University Board of Visitors and Alumni Association Board of Directors, recognize and thank Nancy B. Shelton for her dedication and service to Longwood University, and wish her every blessing in her well-earned retirement.

[Date]

[University Seal]

Colleen Margiloff
Rector, Board of Visitors

Kathleen Early
President, Alumni Association

W. Taylor Reveley, IV
President, Longwood University

A RESOLUTION HONORING

TOWN MANAGER GERALD SPATES

LONGWOOD UNIVERSITY

WHEREAS, Gerald Spates has served Farmville as town manager for 40 years, beginning during the presidency of W. Taylor Reveley II at Hampden-Sydney College and continuing into the presidency of his grandson at Longwood, and worked with professionalism, vision and dedication to the community; and

WHEREAS, Longwood recognizes its own prosperity and vibrancy are inextricably connected with that of our home community, and that the palpable energy and momentum in Farmville today are attributable to a considerable degree to Mr. Spates' hard work and vision; and

WHEREAS, he has been a good friend and supporter of Longwood University, and worked with faculty, staff and students over four decades, including seven Longwood presidents, playing an instrumental role in creating and nurturing the positive relationship that today exists between the institution and the town; and

WHEREAS, Longwood is deeply grateful for his friendship and help as we have thrived and grown;

NOW, THEREFORE, BE IT RESOLVED that Board of Visitors commends Gerald Spates and expresses our deep gratitude for his 40 years of service to our community.

This the 25th day of February, 2015.

Colleen M. Margiloff, *Rector*	W. Taylor Reveley IV, *President*

Longwood University Sexual Misconduct Policy

Longwood University is committed to providing a healthy living, learning and working environment; an atmosphere that emphasizes the dignity and worth of the individual, which promotes personal integrity, civility and mutual respect, and creates an environment that is free from sexual misconduct and discrimination. Sexual misconduct, sexual discrimination and sexual harassment, are incompatible with Longwood's commitment to diversity and educational equity. Educational training and prevention programs will be provided along with appropriate resources and reporting options. This policy includes all forms of sexual misconduct, including sexual discrimination, sexual harassment, sexual assault, sexual violence, intimate partner violence and stalking by employees, students, or third parties. This policy addresses any sexual misconduct that involves members of the Longwood community regardless of whether the incident occurs during working hours and regardless of whether the incident occurs on or off campus. The intent of this policy is to provide the campus community with information, common definitions, and strategies to report and manage incidents that occur.

Eligibility for Assistance

This policy applies to all Longwood students, staff and faculty in all university programs and activities regardless of location of the incident(s). This policy also applies to individuals who join our community as an affiliate or part of an affiliated program. The University will conduct investigations to the best of their ability that may lead to appropriate criminal, personnel, and Student Conduct actions. All Longwood students, staff and faculty shall be offered immediate resources which may include counseling, medical assistance and living, learning and/or appropriate working environment accommodations.

If the complainant is a Longwood student, staff or faculty member and the accused respondent has no affiliation to Longwood, the complainant shall be offered available resources as appropriate. To the extent possible, the University will address the behaviors defined below towards any member of the Longwood community by non-members, including contractors, alumni, visitors, and any others identified as non-employees or non-students of the University.

If the complainant is a Longwood student, staff or faculty member and the accused respondent is affiliated with Longwood, both the complainant and accused respondent shall be offered available resources as appropriate.

If the complainant is not a Longwood student, staff or faculty member but the accused respondent is affiliated with Longwood, the respondent shall be offered counseling, medical and other resources as appropriate.

Definitions

Sexual Misconduct is a term that encompasses any sexual behaviors that violate Longwood University's Code of Conduct and University Policies. In general, any non-consensual contact of a sexual nature may constitute Sexual Misconduct. Sexual Misconduct may vary in its severity and consists of a range of behaviors or attempted behaviors that may be grounds for student conduct action under University policy. The following policy definitions apply:

1. **Consent:** Effective consent is the basis of the analysis applied to unwelcome sexual contact. Lack of consent is the critical factor in any incident of sexual misconduct and sexual violence. Consent is informed, freely and actively given and requires clear communication between all persons involved in the sexual encounter. Consent is active, not passive. Consent can be communicated verbally or by actions. But in whatever way consent is communicated, it must be mutually understandable. Silence, in and of itself, cannot be interpreted as consent. It is the responsibility of the initiator of sexual contact to make sure they understand fully what the person with whom they are involved wants and does not want sexually. Consent to one form of sexual activity does not imply consent to other forms of sexual activity. Previous relationships or consent does not imply consent to future sexual acts.

   Consent cannot be procured by use of physical force, compelling threats, intimidating behavior, or coercion. Coercion is unreasonable pressure for sexual activity. Coercive behavior differs from seductive behavior based on the type of pressure someone uses to get consent from another. Effective consent cannot be given by minors, mentally disabled individuals or persons incapacitated as a result of drugs or alcohol. If a person is mentally or physically incapacitated or impaired so that such person cannot understand the fact, nature or extent of the sexual situation or activity, there is no consent; this includes impairment or incapacitation due to voluntary alcohol or drug consumption by the alleged victim, or being asleep or unconscious. Incapacitation is a state where one cannot make a rational, reasonable decision because they lack the ability to understand the who, what, when, where, why or how of their sexual interaction. Use of alcohol or other drugs will never function to excuse behavior that violates this policy.

   This policy also covers someone whose incapacity results from mental disability, sleep, involuntary physical restraint, or from the taking of a so-called "date-rape" drug. Possession, use and/or distribution of any of these substances, including Rohypnol, Ketomine, GHB, Burundanga, etc. is prohibited, and administering one of these drugs to another student for the purpose of inducing incapacity is a violation of this policy.

2. **Sexual activity**: includes intentional contact with the breasts, buttock, groin, or genitals, or touching another with any of these body parts, or making another touch oneself or themselves with or on any of these body parts; any intentional bodily contact in a sexual manner, though not involving contact with/of/by breasts, buttocks, groin, genitals, mouth or other orifice. Intercourse however slight, meaning vaginal penetration by a penis, object, tongue or finger; anal penetration by a penis, object, tongue; or finger, and oral copulation (mouth to genital contact or genital to mouth contact).

3. **Sexual Discrimination:** includes all forms of: sexual harassment, sexual assault, and sexual violence by employees, students, or third parties against employees, students, or third parties. Students, University employees, and third parties are prohibited from harassing other students and/or employees whether or not the incidents of harassment occur on the Longwood campus and whether or not the incidents occur during working hours.

4. **Unwelcome sexual contact**: includes touching either of the complainant or when the complainant is forced to touch another person's body, directly or through clothing.

5. **Coerced sexual intercourse**: includes rape, attempted rape, sodomy, or other sexual acts or misconduct; or when the complainant is incapable of consent by reason of age, mental incapacity (including unwitting consumption of drugs), or physical helplessness.

6. **Sexual Exploitation:** Sexual Exploitation occurs when an individual takes non-consensual or abusive sexual advantage of another for his/her own advantage or benefit, or to benefit or advantage anyone other than the one being exploited, and that behavior does not otherwise constitute one of the other sexual misconduct offenses. Examples of sexual exploitation include, but are not limited to:

   a. prostituting another student;
   b. non-consensual video or audio-taping of sexual activity;
   c. going beyond the boundaries of consent (such as allowing friends to hide in a closet to watch you having consensual sex);
   d. engaging in voyeuristic behavior;
   e. knowingly transmitting an STD or HIV to another.

7. **Sexual Harassment:** Sexual harassment is unwanted sexual advances, requests for sexual favors, or visual, verbal, or physical conduct of a sexual nature when: (1) submission to such conduct is made a term or condition of employment or the educational relationship; (2) submission to or rejection of such conduct is used as a basis for employment or education decisions affecting the individual; or (3) such conduct has the effect of unreasonably interfering with a student's or employee's work performance or creating an intimidating, hostile, or offensive working, educational, or living environment. While sexual harassment encompasses a wide range of conduct, some examples of specifically prohibited conduct include:

   a. Promising, directly or indirectly, a student or employee a reward, if the student or employee complies with a sexually oriented request.
   b. Threatening, directly or indirectly, retaliation against a student or an employee, if the student or employee refuses to comply with a sexually oriented request.
   c. Denying, directly or indirectly, a student or employee an employment or education related opportunity, if the student or employee refuses to comply with a sexually oriented request. Engaging in sexually suggestive conversation or physical contact or touching another student or employee.
   d. Displaying pornographic or sexually oriented materials.
   e. Engaging in indecent exposure.
   f. Making sexual or romantic advances toward a student or employee and persisting despite the student or employee's rejection of the advances.
   g. Physical conduct such as assault, touching, or blocking normal movement.
   h. Retaliation for making harassment reports or threatening to report harassment.

   Sexual harassment can involve males or females being harassed by members of either sex. Although sexual harassment sometimes involves a person in a greater position of authority as the harasser, individuals in positions of lesser or equal authority also can be found responsible for engaging in prohibited harassment.

   Sexual harassment can be physical and/or psychological in nature. The accumulative effect of a series of incidents can constitute sexual harassment even if one of the incidents considered separately would not rise to the level of harassment.

8. **Intimate Partner Violence:** Intimate partners are individuals in, or formerly in, an intimate relationship with each other. An intimate relationship involves physical or emotional intimacy. Physical intimacy is characterized by romantic or passionate attachment or sexual activity. Intimate partner violence is abuse or violence between partners or former partners, characterized by one or more of the following elements:

a. Intentionally causing bodily injury;
b. Purposely or knowingly causing reasonable apprehension of bodily injury;
c. Emotional abuse creating apprehension of bodily injury or property damage;
d. Repeated telephonic, electronic, or other forms of communication -- anonymously or directly -- made with the intent to intimidate, terrify, harass, or threaten;

9. **Stalking:** includes repeatedly following, harassing, threatening, or intimidating another by telephone, mail, electronic communication, social media, or any other action, device or method that purposely or knowingly causes emotional distress or apprehension of bodily injury or death. Stalking is a course of conduct directed at a specific person that would cause a reasonable person to fear for her, his, or others' safety or to suffer substantial emotional distress.

10. **Retaliation**: is action taken by an accused individual or an action taken by a third party or a group of people against any person because that person has opposed any practices prohibited under this policy or because that person has filed a complaint, testified, assisted, or participated in any manner in an investigation or proceeding under this policy. This includes action taken against a bystander who intervened to stop or attempt to stop discrimination, harassment, or sexual misconduct. Retaliation includes intimidating, threatening, coercing, discouraging or in any way discriminating against an individual because of the individual's complaint or participation in in the complaint process. Action is generally deemed retaliatory if it would deter a reasonable person in the same circumstances from opposing practices prohibited by this policy.

Filing a Sexual Misconduct Complaint

All incidents of sexual misconduct and retaliation should be reported. Longwood University's complaint procedures provide for immediate, thorough, and objective investigation of all claims. The University will take appropriate remedial action that is commensurate with the severity of the offense. The University encourages those who have experienced these types of incidents to immediately report them to both the Title IX Coordinator and Longwood Police. An immediate report to the Longwood Police will enable the preservation of evidence necessary for a successful criminal prosecution. Complainants have the right, however, to choose whether or not to provide a statement to Longwood Police and to choose whether or not to pursue criminal prosecution after such a statement has been made. All University employees, except those designated as Confidential Reporting Options, are designated as "responsible employees." Responsible employees are required to promptly report all incidents and/or knowledge of sexual misconduct, including personally identifiable information of the parties involved, to the University Title IX Coordinator. All reports are treated with the maximum possible privacy.

Title IX Coordinator and Role of Title IX Coordinator

Jennifer Fraley, Director of Student Conduct and Integrity and University Title IX Coordinator
Office: Lancaster G-26;
Office Phone (434) 395-2490, Cell Phone (434) 808-9439
Email: fraleyjl@longwood.edu

Students, staff or faculty who believe they have either witnessed or been subjected to sexual discrimination, sexual harassment, sexual misconduct, intimate partner violence, stalking and retaliation should notify the University Title IX Coordinator.

After the university receives notice of sexual misconduct or retaliation, it will conduct an impartial investigation. For specifics regarding investigations, see investigation procedures below. Student reporters of misconduct will not be charged with alcohol offenses or other minor violations of the Student Conduct Code disclosed during the reporting process. Minor violations are defined as those that have a minimum sanction of letter of admonition. Please see the Code of Conduct Standards and Regulations within the Student Handbook for more information.

When the complainant and the respondent participate in the same educational opportunities, work in the same employment area and/or reside in the same University residence or in proximity to one another, the University will take immediate steps to separate the individuals and prevent contact, if appropriate. The applicable Vice President or designee will make the appropriate determination regarding alternative arrangements. Alternative arrangements may include, but are not limited to: temporary suspension (depending on the severity of the allegations), adjustment of schedule or employment, no contact orders, and/or alternative living arrangements.

The University Title IX Coordinator can assist with all aspects of the process and is responsible for:

- Ensuring that both the individual filing the complaint and the individual responding are aware of the seriousness of the complaint.
- Explaining Longwood University's policy and investigation procedures.
- Exploring various means of resolving the complaint.
- Making referrals to the Counseling Center for counseling or other mental health resources, if appropriate.
- Discussing with the complainant the option of notifying the police if criminal activities are alleged.
- Conducting or arranging for an investigation of the alleged prohibited conduct.
- Arranging support services for the complainant, which could include changes in living arrangements, course schedules, assignments, or tests.
- Arranging interim services to prevent reoccurrence of the alleged prohibited conduct, which could include increased monitoring, supervision, or security at locations or activities where the misconduct occurred and no-contact orders, as necessary.
- Preparing or overseeing any reports, recommendations, or remedial action(s) that are needed or warranted to resolve any prohibited conduct and maintaining all information pertaining to an investigation or complaint in a secure file.
- The University Title IX Coordinator and Deputy Title IX Coordinators will participate in ongoing sexual misconduct training and maintain a high level of knowledge of the policy and procedures.

Longwood University strictly prohibits retaliation against any person for using this reporting process, or for reporting, providing witness, assisting or participating in any manner in any investigation or proceeding involving allegations. Any person who violates this policy will be subject to discipline, up to and including termination if they are an employee, and/or expulsion if they are a student.

Employees who believe they have either witnessed or been subjected to sexual discrimination, sexual harassment, sexual misconduct, intimate partner violence, stalking and retaliation notify the Chief Human Resources Officer (Deputy Title IX Coordinator for Employee Issues).

Della Wickizer, Chief Human Resources Officer
Office: Lancaster 212

Phone: (434) 395-2074
Email: wickizerdh@longwood.edu

Reporting Options

1. Title IX Coordinator: Students, staff or faculty who believe they have either witnessed or been subjected to sexual discrimination, sexual harassment, sexual misconduct, intimate partner violence, stalking and retaliation should notify the University Title IX Coordinator:

   Jennifer Fraley, Director of Student Conduct and Integrity and University Title IX Coordinator
   Office: Lancaster G-26;
   Office Phone (434) 395-2490, Cell Phone (434) 808-9439
   Email: fraleyjl@longwood.edu

2. Making a report with Longwood Police: Persons who wish to file a police report may contact Longwood Police at (434) 395-2091. Office: Dorrill Dining Hall, Ground Floor. Online reporting: http://www.longwood.edu/police/reportacrime.htm

3. Making a Limited Report: Persons who wish to report an incident and desire that the University take no action to investigate this incident, may speak to a trained Campus Advocate. This option produces a limited report, which includes no generally identifiable information about the complainant. A complainant may later choose to file a complaint with the University Title IX Coordinator and thus have the incident fully investigated to the best of the University's ability. To speak to a Campus Advocate please visit the Student Conduct and Integrity website to view the list of Campus Advocates available: http://www.longwood.edu/studentconduct

3. Making a Confidential Report: Persons who wish to report an incident or speak to someone about what happened and desire that the details of the incident be kept confidential, they should speak with staff members of the Counseling Center, Student Health & Wellness Center, or off-campus crisis resources, who will maintain confidentiality. Campus counselors and Student Health & Wellness Center staff are available to help students free of charge. In addition, you may go off campus to speak with clergy and chaplains, who will also keep reports made to them confidential.
   - Counseling Center: Office: Health and Fitness Center, Upper Level; Phone: (434) 395-2409.
   - Student Health & Wellness Center: Office Health and Fitness Center, Upper Level; Phone: (434) 395-2102.
   - Piedmont Crisis Center, Center for Violence Prevention: 24-hour hotline: (888) 819-2926.

Confidentiality

If you would like to report an incident or speak to someone about what happened and if you desire that details of the incident be kept confidential, you should speak with staff members of the Counseling Center, Student Health & Wellness Center or off-campus rape crisis resources, who will maintain confidentiality. All inquiries, complaints, and investigations are treated with utmost discretion. Information can be released as law and policy permit. However, the identity of the complainant is usually revealed to the person(s) accused of such conduct and any witnesses. A complainant can decide after s/he talks to the Title IX Coordinator/Investigators, whether or not to pursue a Title IX Complaint. In addition to the choice of whether or not to pursue a Title IX complaint, complainants may also request confidentiality in terms of not

revealing the complainant's name to a respondent. These requests are evaluated on a case by case basis by the University Title IX Coordinator to determine whether that request can be honored while still providing a safe and nondiscriminatory environment for all students, including the complainant.

Many factors are weighed when determining whether or not to honor a request to withhold the complainant's name from the respondent. These factors include, but are not limited to, when there is a clear and present danger of harm to the complainant or others, when there is knowledge or suspicion of abuse or neglect of minor children or elderly persons, reporting obligations under state law and as otherwise required by law. Additionally, these factors also include circumstances that suggest there is an increased risk of the respondent committing additional acts or there is an increased risk of future acts under similar circumstances, as well as whether the University possesses other means to obtain relevant evidence.

Although a complainant's request to have his or her name withheld from the respondent may limit the University's ability to respond fully to an individual allegation of sexual violence, other means may be available to address the sexual violence. There are steps the University can take to limit the effects of the alleged sexual violence and prevent its recurrence without initiating formal action against the alleged perpetrator or revealing the identity of the complainant.

Federal Statistical Reporting Obligations

Certain campus officials (campus security authorities) have a duty to report sexual misconduct for federal statistical reporting purposes. All personally identifiable information is kept private, but statistical information must be passed along to campus law enforcement regarding the type of incident and its general location (on or off-campus, in the surrounding area, but no addresses are given), for publication in the annual Campus Security Report. This report helps to provide the community with a clear picture of the extent and nature of campus crime, in order to ensure greater community safety.

Mandated federal reporters (campus security authorities) include student/conduct affairs, campus law enforcement, local police, coaches, athletic directors, residence life staff, student activities staff, human resources staff, advisors to student organizations and any other official with significant responsibility for student and campus activities.

Federal Timely Warning Reporting Obligations

Victims of sexual misconduct should also be aware that University administrators must issue timely warnings for incidents reported to them that pose a substantial threat of bodily harm or danger to members of the campus community. The University will make every effort to ensure that a victim's name and other identifying information is not disclosed, while still providing enough information for community members to make safe decisions in light of the danger.

Procedures

1. The Title IX Coordinator shall provide for the adequate, reliable, and impartial investigation of all complaints:

   Investigations of student versus student complaints shall be coordinated by the Director of Student Conduct and Integrity and University Title IX Coordinator and/or designee.

Investigations of student versus employee complaints shall be coordinated by the Chief Human Resources Officer (Deputy Title IX Coordinator for Employee Issues) with support from the Director of Student Conduct and Integrity and University Title IX Coordinator and/or designee.

Investigations of employee versus employee complaints shall be coordinated by the Chief Human Resources Officer (Deputy Title IX Coordinator for Employee Issues) and/or designee.

2. Complainant and/or respondent may each select one support person or advisor, who may also be legal counsel, to accompany them during the investigation process, Informal Procedures and Formal Procedures. The support person or advisor may be present with his or her respective party for all meetings, hearings and appeals, but may not actively participate, address the hearing or appeals board, present arguments, question other parties or witnesses.

3. Only trained investigators will conduct an investigation; both parties will have the opportunity to review and provide comments to the investigator about their statements before the investigation report is finalized.

4. The University will conduct an investigation to the extent of the information available. If the University obtains independent corroborating information of the misconduct it may determine it necessary to move forward with the investigation procedures and/or remedial measures without the involvement of a complainant.

5. Criminal investigations, separate from the process outlined in this policy, shall be conducted by the Longwood Police, in parallel with the University's investigation. In cases where students are the subject of a criminal investigation, the University's investigation will commence parallel to or at the conclusion of such investigation.

6. Barring extenuating circumstances the entire process shall be completed within 60 calendar days. Complainants and respondents will be notified if the process cannot be completed within this timeframe.

7. Informal Procedures

   Some complaints can be resolved through informal mediation between the parties. The University Title IX Coordinator and/or designee may arrange for, or facilitate mediation between the involved parties and coordinate other informal problem resolution measures.

   a. Once a report has been made, informal resolution procedures shall be pursued within five business days of the initial report.
   b. Informal Resolution Procedures are optional and may be used when deemed appropriate. Informal procedures are never applied in cases involving violence or non-consensual sexual intercourse.
   c. An investigation into the report shall be conducted by the Title IX Coordinator or designee.
   d. Once the informal resolution procedure is complete, written notification of the agreed upon resolution shall be given to both parties by the Title IX Coordinator or designee.
   e. The involved parties will sign a voluntary agreement specifying the behavioral expectations resulting from the mediation. If re-occurrence takes place, those responsible for such behavior will be subject to additional action, with greater penalties, under this policy.
   f. If either party is unsatisfied with the outcome of the informal resolution procedure, the formal resolution procedure may be pursued.

8. Formal Procedures

   a. Once the university has received notice of sexual discrimination, sexual harassment, sexual misconduct, sexual assault, sexual violence, intimate partner violence, stalking and retaliation, an investigation shall commence within five business days.
   b. To ensure a prompt and thorough investigation, the complainant should provide as much of the following information as possible:
      - The name, department, and position of the person or persons allegedly committing the misconduct.
      - A description of the incident(s), including the date(s), location(s), and the presence of any witnesses.
      - The alleged effect of the incident(s) on the complainant's educational opportunities, living situation, position, salary, benefits, promotional opportunities, or other terms or conditions of employment.
      - The names of other students or employees who might have been subject to the same or similar misconduct.
      - Any steps the complainant has taken to try to stop the misconduct, if appropriate.
      - Any other information the complainant believes to be relevant to the misconduct.
   c. The investigator shall determine, by a preponderance of evidence, whether the respondent violated this policy. Preponderance of evidence means that it is more likely than not that a violation occurred. If the investigator determines that the respondent did not violate this policy, the matter will be closed.
   d. At the completion of the investigation, both the respondent and complainant will be informed within five working days, in writing, of the outcome of the investigation.
   ~~d.~~e. Both the complainant and respondent are entitled to a copy of the investigators' report. The report shall be provided to the complainant or respondent within two working days after the University Title IX Coordinator or designee has received a written request.
   ~~e.~~f. If it is determined by a preponderance of the evidence that a violation did occur, the respondent may accept findings of the investigation and the sanction/measures to prevent the violation's recurrence; or challenge the findings and request a hearing.
   ~~f.~~g. The complainant may decide, subsequent to the filing of formal charges against the respondent, to withdraw the complaint. The university will, however; still proceed based on the investigative findings.

Procedures for Hearings on Violations of the Sexual Misconduct Policy

1. The University Hearing Board will conduct hearings regarding alleged violation(s) of this policy.

2. A University Hearing Board hearing will proceed in the following manner:

   a. Hearings conducted by the University Hearing Board are closed to the public. The only individuals allowed to be present are active participants in the hearing process: the complainant, the respondent, an advisor for each, the University Hearing Board, witnesses, and necessary university administrators. Either the complainant or the respondent may dispute the presence of individuals in the hearing room. The hearing board will make the final decision.
   b. The hearing board members and all aforementioned participants are introduced.
   c. Participants state any questions they have concerning rights or procedures.
   d. The statement of charges is presented.
   e. The respondent enters a plea of responsible, not responsible or no plea.
   f. Testimony phase: During the testimony phase of the hearings, cross-examination will be conducted by the hearing board in the presence of the complainant, the respondent and their respective advisors. Witnesses may only be present when actively giving testimony. Advisors may be present with their

respective parties for all testimony, but may not actively participate, address the hearing board, present arguments or question witnesses.

g. The respondent and the complainant or University, may each present an opening statement and a closing statement before the Board. The respondent and complainant/University may view each other's statements on live video feed.
h. The respondent and complainant or University may present evidence and witnesses. Witnesses may be cross-examined by the hearing board in opposing party's presence. The board will privately cross-examine the respondent, the complainant, and any witnesses they deem necessary. The respondent and complainant may view testimony on live video feed.
i. The respondent and the complainant or University may each submit a list of questions to the board's chairperson for the board to consider. The past sexual history or sexual character of a party to the complaint, complainant or respondent, with anyone other than each other, will not be admissible. Notwithstanding the above, demonstration of pattern, repeated, and/or predatory behavior by the respondent, in the form of previous findings in any University, judicial or student conduct proceeding will be admissible. The parties will be notified in advance of the hearing if any information addressed by this paragraph is deemed admissible.
j. After all of the evidence has been introduced, the parties will be excused from the room so that the board may deliberate.
k. The University Hearing Board shall determine, by a preponderance of evidence, whether the respondent violated this policy. Preponderance of evidence means that it is more likely than not that a violation occurred. If the University Hearing Board determines that the respondent did violate this policy, the complainant will be allowed to submit a statement regarding the impact that the misconduct has had on the educational, living and/or working environment of the complainant.
l. When the board has made a decision regarding responsibility, the parties will be invited back into the room for a reading of the decision and any recommended sanctions.

3. Both the respondent and complainant will be informed within five working days, in writing, of the outcome of the complaint and the appeal (if an appeal is filed).

Composition of the University Hearing Board

1. A five-member University Hearing Board will be appointed by the University Title IX Coordinator, on a per-case basis from a pool of trained members: no less than 6 faculty and 6 staff. The chair of the hearing board is a non-voting member, except in cases of a tie, who leads the hearings and facilitates discussion among board members. The University Title IX Coordinator will serve as a non-voting advisor to the chair. All Board members are appointed annually and serve from October 1 - September 30.

2. The pool of candidates for the University Hearing Board shall be nominated by:
   - Faculty Senate, Executive Committee (faculty members).
   - Vice President for Student Affairs and Vice President for Finance and Administration (staff).

3. In the case of a faculty respondent, at least three members of the University Hearing Board shall be faculty, in the case of a professional staff respondent; at least three members of the University Hearing Board shall be staff (except in cases where there is not sufficient availability in the pool of trained members).

~~3.~~ 4. The complainant and/or respondent can request board members to recuse themselves from the hearing for actual or perceived bias or other conflict of interest. The final decision regarding this request will be made

by the University Title IX Coordinator based on the information provided by the requesting party. Board members may also recuse themselves if they feel they cannot or should not hear a particular case.

~~4.~~5. The University Hearing Board panel will be trained by the University Title IX Coordinator regarding hearing procedures, evaluation of evidence, Title IX requirements and other relevant subjects, as needed.

~~5.~~6. Individuals cannot serve on both the University Hearing Board panel and the University Appeals Board panel during the same academic year.

Appeals

1. Appeals will be heard by the University Appeals Board.

2. Respondents and complainants have the right to one appeal each of the University Hearing Board's decision.

3. Appeals must be filed within three working days of the University Hearing Board's decision. To file an appeal, students and employees must fill out the appeal form provided with written notice of the University Hearing Board's decision.

4. Appeals may only proceed based on one of three reasons:

   a. Failure to follow policy procedures.
   b. Additional evidence has come to light that was not available at the time of the University Hearing Board's hearing.
   c. The sanction received is out of proportion with the offense.

   Eligibility for an appeal hearing based on the above reasons will be determined by the Director of Student Conduct and Integrity and University Title IX Coordinator or designee.

5. The University Appeals Board will convene within five working days of the receipt of the appeal. Both parties will receive notice of the time and place of the appeal.

6. The appeal will be non-adversarial and strict rules of evidence will not be applied.

7. The outcome of the appeal and any recommended sanctions will be forwarded to the applicable Vice President or designee immediately following the appeal: The Director of Student Conduct and Integrity in the case of a student respondent, the Provost and Vice President of Academic Affairs in the case of a faculty respondent, and the Vice President of Administration and Finance in the case of a classified staff or administrative employee.

~~6.~~8. Both the respondent and complainant will be informed within five working days, in writing, of the outcome of the appeal and of any sanctions being recommended to the applicable Vice President or designee.

Composition of the University Appeals Board

1. A three-member University Appeals Board will be appointed by the University Title IX Coordinator, on a per-case basis from a pool of trained members: no less than 6 faculty and 6 staff. All Board members are appointed annually and serve from October 1 - September 30.

2. The pool of candidates for the University Appeals Board shall be nominated by:
   - The Faculty Senate, Executive Committee (faculty members).
   - Vice President for Student Affairs and Vice President for Finance and Administration (staff).

3. In the case of a faculty respondent, at least three members of the University Hearing Board shall be faculty, in the case of a professional staff respondent; at least three members of the University Hearing Board shall be staff (except in cases where there is not sufficient availability in the pool of trained members).

~~3.~~4. The complainant and/or respondent can request board members to recuse themselves from the appeal hearing for actual or perceived bias or other conflict of interest. The final decision regarding this request will be made by the University Title IX Coordinator based on the information provided by the requesting party. Board members may also recuse themselves if they feel they cannot or should not hear a particular case.

~~4.~~5. The University Appeals Board will be trained by the University Title IX Coordinator regarding hearing procedures, evaluation of evidence, Title IX requirements and other relevant subjects, as needed.

~~5.~~6. Individuals cannot serve on both the University Hearing Board and the University Appeals Board during the same academic year.

Rights of the Complainant

1. The right to have a support person or advisor throughout the process, who may also be legal counsel.
2. The right to remain present, either in person or via live feed, throughout the entire hearing (not including the deliberative process).
3. The right to attend a pre-hearing meeting with the Title IX Coordinator or designee.
4. The right to have access to existing campus counseling and support services.
5. The right to interim services to prevent reoccurrence of the behavior.
6. The right to freedom from retaliation by the respondent (or supporters of the respondent).
7. The right to be notified of the time, date and place of the scheduled hearing at least 72 hours prior to the hearing.
8. The right to submit a statement of how the misconduct has impacted the educational, living and/or working environment of the complainant.
9. The right to know the outcome of the investigation, the outcome of the hearing, appeal and the sanctions, remedies and corrective actions taken by the University.
10. The right to be informed of the ability to request changes in academic, employment and living situations.
11. The right to request a single appeal of the outcome of the University Hearing Board's decision and recommended sanctions (if necessary).

Rights of the Respondent

1. The right to a support person or advisor throughout the process, who may also be legal counsel.

2. The right to remain present during the entire hearing either in person or via live video feed (not including the deliberative process).
3. The right to attend a pre-hearing meeting with the Title IX Coordinator or designee.
4. The right to have access to existing campus counseling and support services.
5. The right to freedom from retaliation by the complainant (or supporters of the complainant).
6. The right to notice of allegations and the opportunity to testify.
7. The right to be presumed not responsible unless shown responsible by a preponderance of the evidence.
8. The right to a timely hearing.
9. The right to notification of the charges, the specific rule or policy violated, and the time, date and place of the scheduled hearing at least 72 hours prior to the hearing.
10. The right to notification of any information that may be used in the hearing.
11. The right to request a single appeal of the outcome of the University Hearing Board's decision and recommended sanctions (if necessary).

Sanctions, Remedies and Corrective Actions

Violations of this policy will be addressed through the sanctions, remedies and corrective actions listed below. The severity of sanctions, remedies or corrective action depends on the facts and circumstances of the offense and/or any history of past conduct that violates this policy. Sanctions, remedies and corrective actions could include (but are not limited to):

- A requirement not to repeat or continue the conduct.
- Reprimand.
- Reassignment.
- Suspension.
- Termination of employment.
- Expulsion.

Academic Freedom and Free Speech

This policy does not allow censorship of constitutionally-protected speech, which is valued in higher education and by Longwood University. In addressing all complaints and reports of alleged violations of this policy, Longwood University will take all permissible actions to ensure the safety of students and employees while ensuring free speech rights of students and employees. This policy does not in any way apply to curriculum and curriculum decisions or limit the use of particular textbooks or curricular materials.

Internal Audit

Ella Maokhamphiou, Audit Director

Update on Internal Audit Activity

The status of all carry over, current, annual and quarterly audits is as follows:

Audits and Reviews	Status	Percent Complete
Carry Over from Previous Audit Plan		
Contract Management	On Hold	15%
University Center	Complete	100%
Fraternity and Sorority Life	Complete	100%
Citizen Leadership and Social Justice Education – Leadership & Service Learning	Testwork	75%
Citizen Leadership and Social Justice Education – Diversity & Inclusion	Not Started	
Current Audits		
Risk Based		
Banner Finance	Not Started	0%
Information Technology – General Controls	Planning	20%
Information Technology – Lancer Card	Complete	100%
Environmental Health & Safety	Reporting	90%
Student Government Association	Complete	100%
Facilities – Motor Pool	Testwork	25%
Post Office	Reschedule to FY 17	0%
Advancement	Not Started	0%
Network Vulnerability	Complete	100%

Audits and Reviews	Status	Percent Complete
Assessment		

Annual Audits

Risk Assessment	Complete	100%
NCAA Compliance	Complete	100%

Quarterly Audits

Follow-Ups	September – Completed December – Testwork	35%

Special Projects

Hotline Calls	1 Active Cases 1 Substantiated Case	

FY2016 Audit Plan

The proposed audit plan for fiscal year 2016 is as follows:

Carry Over

Contract Management
Banner – Finance
Diversity and Inclusion
Advancement

Risk Based

Payroll
Lancer Card
Materiel Management
Facilities Administration
Building Security
Athletics – Internal Operations
Marketing and Communications
Lenel
Banner – HR
Information Security
AIM and Kronos

Annual Audits

Risk Assessment
NCAA Compliance –
Financial Aid, Camps and Clinics, Recruiting, and Play and Practice Sessions
Network Vulnerability Assessment

Quarterly Audits

Follow-Ups

Special Projects

Special Projects
Management Requests

5

Academic Affairs

Ken Perkins, Vice President & Provost

Highlights

- Longwood's accreditation by the Southern Association of Colleges and Schools Commission on Colleges has been reaffirmed with no strings attached
- Dr. Joan Neff of the University of Richmond named Provost

Other than some inclement weather, the semester has been proceeding smoothly, and the campus community is delighted with the search process that has resulted in Dr. Joan Neff of the University of Richmond being named our next Provost and Vice President for Academic Affairs beginning this summer. The announcement information is included in this tab.

As noted in the highlights above, Longwood has been fully reaffirmed by SACSOC. This only deserves comment because this one topic has been a staple of the last two years of narratives from Academic Affairs. In forthcoming narratives in the years ahead, there will be updates about the Fifth-Year report due to the Commission at the midway point over the next decade, towards the conclusion of which our next full reaffirmation of accreditation cycle will begin.

Dr. Lara Fergeson, professor of history, has been appointed interim Associate Vice-President for Academic Affairs. Lara's skills, energy, and comprehensive knowledge of Longwood will be of great use as we make a provost transition and move forward with strategic initiatives in Academic Affairs. These include the Quality Enhancement Plan, the creation of a new core curriculum, and the outreach of the LCVA, Hull Springs Farm, and the Moton Museum.

Lara has been the History Program Coordinator, has worked closely with the Moton Museum, and has experience teaching in interdisciplinary settings. She has served on faculty senate for several years in addition to chairing it three times during some challenging situations for the university.

<u>Cormier Honors College</u>

In January the Honors College hosted its annual Preview event, which was the largest to date, attracting 60 prospective students and more than 100 parents and guests. To date more than 130 prospective students have submitted the Honors application portfolio, and that number also is up by more than 30 applications from previous years.

Here are several projects involving students of the Honors College:

- The Honors Student Association is actively fostering community among the Honors students while also connecting them with the local community. That will culminate later this semester with the Eddie Carey, Jr. Day of Service at Hull Springs Farm.
- Four students who completed a Fall Honors seminar with Ms. Ann Bradshaw traveled to the Dominican Republic over the winter break to complete a service project grounded in their academic experience. They were accompanied by Mrs. Ardeania Ward for this week-long academic adventure.
- A multi-disciplinary exhibition of their work, Expresion Creativa, has been on display in the Bedford Gallery since late January. Other coursework connects our students' intellectual energy to their communities, and notable is Ms. Bradshaw's Street to Cell course that engages students in dialog with inmates at the Piedmont Regional Jail.
- A project is underway to honor recently deceased Riley Cole and his contributions to the Honors community. Though a permanent name is yet to be identified, this "Learning Adventures" program will support Honors students who seek to answer this question, "Where would I go and what would I do to really push my intellectual comfort zone?"
- A partnership with International Affairs will promote student participation in the National Student Exchange, a program that allows our students to spend a semester at another institution (and to host students at Longwood).

Finally, the Honors College is home to a National Science Foundation grant to support curricular transformation at life science departments across the country. The important progress of that program was shared in late February with program officers from the National Science Foundation and the Howard Hughes Medical Institute.

Cook-Cole College of Arts and Sciences

Cook Cole has the largest number of faculty and students of all the colleges. Needless to say, in any given semester, there is significant activity within the departments. The following are a few of the highlights.

- The Department of History, Political Science, and Philosophy co-hosted (with Appomattox Court House National Historical Park) our 16th annual Civil war Seminar on March 13-15, in commemoration of the 150th anniversary of the end of the war (it is being televised by C-Span this year).
- The Department of English and Modern Languages will be co-hosting the 9th annual Undergraduate Medieval Conference, "Meeting in the Middle," on March 27-28.
- In Nursing, the RN to BSN program officially started in January. Currently the department is partnering with Southern Virginia Regional Medical Center in Emporia to begin a RN to BSN cohort in the fall in Emporia, Virginia using the Longwood University outreach center located there.

In regard to Longwood's Quality Enhancement Program, R.E.A.L. Inquiry, a number of departments are adjusting courses and curriculum to integrate this initiative.

One such department is Biology and Environmental Sciences. Historically, faculty promoted research opportunities through the internship program by mentoring a small number of students

in their individual research programs. Currently, all sections of Genetics now feature a laboratory project in Synthetic Biology in which students are designing and constructing novel genetic "machines". These courses are also collaborating with nationally recognized programs to bring genomic sciences into multiple courses allowing students to develop marketable skills in multiple interdisciplinary techniques. Together these represent some of the largest growth opportunities in biotechnology and computational biology and the application of "Big Data" to medical and scientific industries.

Continuing the theme of R.E.A.L Inquiry programming, this past fall, fourteen ENGL 150 research-enhanced sections were led by tenured/tenure-track faculty Dr. Chene Heady, Dr. David Magill, Dr. John Miller, and Dr. Derek Taylor and lecturers Dr. Steven Florczyk and Mr. Jeff Spicer. Most of the enhanced course used Eric Link and Steven Frye's *Crosscurrents: Reading in the Disciplines* to engage students in thinking and writing about a single issue through the disciplinary lenses of economics, arts, education, science and history.

College of Education and Human Services

A Longwood alum and lifelong educator from Portsmouth has recently bequeathed about $100,000 to the college. This bequest will be unrestricted for use within the college.

The college is exploring the possibility of bringing a comprehensive early childhood program to Longwood. The program would serve a range of goals: It would offer students an academic track and training in early childhood development; produces graduates in an area of critical need; provide faculty and student research opportunities; and serve Longwood employees and the larger community with child-care services. Dr. Joy Saab of West Virginia University, who has developed such a program, will be a consultant.

The Department of Education and Special Education had initiated an effort to reestablish the education leadership program. Longwood, with its enviable legacy of teacher education, should have a strong educational leadership curricular focus at the graduate level.

The Health, Athletic training, Recreation, and Kinesiology (HARK) department hosted a National Strength and Conditioning workshop with 40 plus attendees.

Finally, Physical Education/Kinesiology has been engaged in an initiative to paint United States maps on local school playgrounds. They have completed five.

College of Business and Economics

The Longwood Online MBA was included the Top 100 Rankings for the second year in a row per US News and World Report. This ranking, along with a step-up in investment in social media marketing/outreach has had the effect of increasing inquiries, applications and acceptances in the MBA. In summer 2014 the MBA residency saw 30 participating students, and the conservative estimate is that 40 students will participate in this year's (2015) MBA residency.

The Longwood Cyber Security Center developed a highly distinctive outreach initiative in its Cyber Security Workshops for Rural High School Students. Dominion Resources has funded the pilot for this program that will introduce basic concepts and career opportunities in the cyber security field to an underserved population of rural high school students. The pilot for the

initiative will be launched with Prince Edward County, and the Superintendent, Dr. David Smith, is collaborating with Longwood in this regard.

The Hybrid-Online Personal Finance Dual Enrollment initiative continues to flourish as it serves high school students around the state. With few exceptions most of the state counties have signed partnership agreements for the program and SCHEV has officially approved Longwood's offering of this distinctive program. This summer 2015 will be the start of the Honors Academy for Personal Finance Dual Enrollment and it will increase an already rigorous curriculum and bring high school students to the Longwood campus for a full week. The expectation of enrollment in both the standard and Honors Academy courses is approximately 250 high school students. This program is a unique offering that introduces our campus to top GPA high school students to help drive our overall university enrollment objectives.

The SNVC Institute for Leadership and Innovation hosts the 7 Habits of Highly Effective People Signature program. The institute partnered with Longwood's Dr. Jennifer Green on an experiment to test for positive impact of the 7 Habits program on retention of at risk freshmen at Longwood. The experiment is underway this Spring Semester 2015 and results will be shared as they become available.

Greenwood Library

The Library welcomed two new librarians in January that filled vacancies in existing lines. Dorothy Lockaby was appointed as Reference Services Coordinator and Vicki Palmer is the new Research Services, Marketing and Outreach Librarian.

Ms. Lockaby will schedule and coordinate reference services, arrange reference training for library faculty and staff, provide library instruction and liaison services to designate university departments including English, and collaborate with other librarians and staff to plan and assess the reference and instructional needs of students and faculty.

Ms. Palmer will coordinate and implement programming opportunities with other campus departments and the local community, assist in the planning and promoting of Library events and speaker, manage the social media presence of the library, and serve as a subject liaison to other academic departments including Communication Studies. She will also collaborate with Library faculty and staff on social media efforts, and Friends of the Greenwood Library events.

College of Graduate and Professional Studies

By the end of this academic year, the Graduate College will have helped support 86 graduate students from 7 different graduate programs with their travel to professional conferences.

The Office of Continuing and Professional Education, in partnership with Longwood's Small Business Development Center, has been contracted to develop and offer the Hopewell Community Business Launch (CBL) program for the City of Hopewell. The program will consist of an 8-week intensive business training course culminating in a business plan competition where participants will vie for $70,000+ in grants and additional prizes to help start or expand their ideas. A similar initiative for high school students, BizVenture, is being implemented in Mecklenburg and Greensville County schools helping teachers there take high

school students through the process of developing a business model and explore entrepreneurial ideas.

Two 3D printers in the Digital Den (a collaborative instructional technology workspace in Ruffner) have been used for a variety of projects by both students and faculty. The Biology Department is exploring ways to replicate actual human remains for study and research. Communication Sciences and Disorders is creating nasal cavity models for instructional use.

Office of Assessment and Institutional Research

The Office of Assessment and Institutional Research (OAIR) serves the University primarily in two areas: coordinating the campus-wide annual assessment and preparing institutional/program level reports in response to the requests from federal, state, and other external agencies.

By the end of February2015,in the assessment area, the OAIR team has:

- Completed a revision of the OAIR website to improve and provide access to information and resources, such as using SCHEV reports
- Continued to sustain Longwood Assessment Mini-grant Program (LAMP). It is anticipated that, in 2015, LAMP will award 10 assessment proposals.
- Hosted the 5th annual Longwood Assessment Conference (virtually). Ten faculty and two AP staff, recipients of the 2014 LAMP awards, presented their findings about best practices in assessment.

International Affairs

The most important initiative this spring has been the ongoing recruitment of a full-time study abroad director. In the past, this position was held by a faculty member with a reduced load and stipend. The full-time director will be able to provide year-round services to students and faculty and market the study abroad program to increase faculty and student participation.

The English as Second Language program is developing a "bridge" initiative to help students that graduate from the program better integrate into academic life at Longwood.

Hull Springs Farm

Overall reservations for facilities at the Farm have increased for the coming year, including--Longwood research projects in coordination with VIMS (Virginia Institute of Marine Science), ornithology and sustainability classes, and three weddings scheduled for the Fall.

Construction of the stream restoration and planting of associated buffer areas, along with a portion of the wetland enhancement work, have been completed.

Other projects in the works for Hull Springs include:

- Potential broadband service expansion in partnership with Mid-Atlantic Broadband
- Presentation by HSF Director and 3 LU faculty members to Hampden-Sydney student body regarding Hull Springs research opportunities

- Consideration of a folk art summer program at HSF in coordination with LCVA
- LU student intern project focusing on study of hops production at HSF and development of a craft brewery.

Office of Sponsored Programs and Research

OSPR assisted in the development and submission of six applications for external funding in the period between December 2014 and February 2015. Total funds requested was $667,556

The Center for Faculty Enrichment (Café)

Cafe is in the process of planning the 3rd Annual Teaching and Learning Institute at Longwood; about 100 faculty, from a variety of colleges/universities in Virginia, come together for a day-long program. In coordination with Longwood's REAL Inquiry, this year's theme is Integrating Undergraduate Research into Pedagogical Practice. In early March, Café will launch the New Faculty @ Longwood blog site as part of a revised New Faculty first year program.

Longwood Center for the Visual Arts

On February 6th, LCVA welcomed almost 200 to the opening of *Artificial/Life*, a pair of exhibitions – *On the Road* and *Electric Sheep* – born of digital art experimentation and collaboration. It invites viewers to explore concepts of authentic experience and what it means to be "alive" as technology becomes more deeply integrated in our daily human existence. These exhibitions are interdisciplinary in nature and united in their exploration of technology, literary allusion, and conceptual collaboration. They are on view through March 29, 2015.

On Wednesday, February 18, the LCVA debuted its newest program, Art after Dark Creative Gatherings, with a screening of *Blade Runner*, a dystopian thriller that examines questions of reality and what it means to be human.

Office of Accreditation and Compliance

On December 7, 2014, the Board of Trustees of the Southern Association of Colleges and Schools Commission on Colleges (SACSCOC) voted to reaffirm Longwood's accreditation. The next full reaffirmation will take place in 2024, with the abbreviated Fifth-Year Interim Report due in 2020.

Office of Student Research

The purpose of the Office of Student Research is to increase campus-wide awareness of and participation in student research and inquiries across disciplines and facilitate student-faculty collaborations. The OSR will provide campus-wide oversight of student research activities, coordinate current undergraduate and graduate programs as well as develop and manage new programs, facilitate the development of research-related skills training, and provide professional development and peer-mentoring support for students and faculty. In addition, the OSR will coordinate and promote the annual Longwood University Student Research Showcase. Two graduate assistants will assist the Director. The OSR will be located in the Greenwood Library for now.

Dr. Crystal Anderson will officially assume responsibility for the Office of Student Research in late June. Dr. Anderson will attend Longwood's Teaching and Learning Institute *on Integrating Undergraduate Research into Pedagogical Practice* on May 21 and is working with Dr. Pam Tracy on program planning through the spring while she completes her commitments at Elon University.

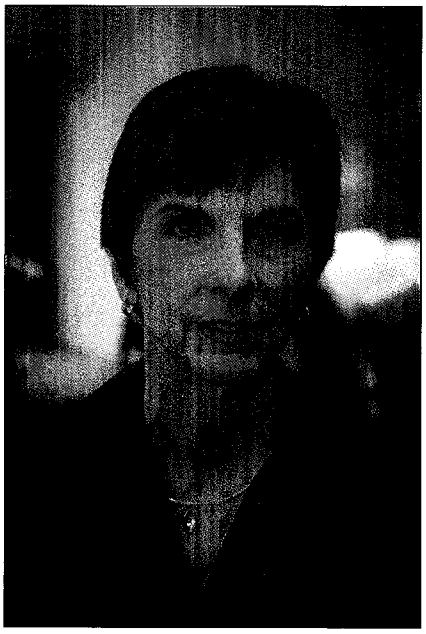
Longwood University

175 years 1839-2014

2015 News Releases

Dr. Joan Neff, key leader at University of Richmond, named Longwood's Provost

March 12, 2015


Dr. Joan Neff

During her more than three decades at the University of Richmond, Joan Neff has played an instrumental role in that institution's ascent from regional to national prominence. As a professor, department chair, and since 2009 associate provost, she has been front and center as Richmond broadened its reach and impact without sacrificing its sense of community and committed teaching culture.

Getting to know Longwood closely in recent months, she came to see much the same potential – and wanted to be a part of it.

In an email to campus earlier today March 10, President W. Taylor Reveley IV introduced Neff as Longwood's next provost and vice president for academic affairs – the university's chief academic officer. A national search for the position began this past fall, led by the chair of Longwood's Faculty Senate, David Lehr. This summer, Neff will succeed Ken Perkins, who announced at the beginning of this academic year he planned to step down as provost after the spring semester.

"The remarkable quality of our applicant pool is a tremendous testament to Longwood and our momentum here. But as I have gotten to know Joan, she has stood out, and deeply impressed me as someone with the values, vision and experience to lead the academic enterprise at Longwood, building on the great work of Ken Perkins," Reveley said. "What Joan has helped Richmond to accomplish is remarkable, and her enthusiasm for Longwood and its public mission is palpable and invigorating."

Neff said that in visiting campus during the search process, she discovered a place whose spirit resonated with her own commitment to student-centered teaching, but also an institution with the drive to be a leader in American higher education.

"Longwood's reputation in Virginia, its long history, its strong traditions and core strengths are what caught my eye, along with its sense of purpose and mission," Neff said. "As a graduate of two public universities myself, I feel a deep connection to the concept of a public comprehensive university strongly rooted in the liberal arts, firmly committed to affordability and accessibility."

Neff, who received her undergraduate degree from the University of Delaware and her M.A. and doctorate in sociology from The Ohio State University, is a widely noted scholar in the field of criminology and the author of numerous publications. Among her most recent honors, she was a nominee for the American Society of Criminology Teaching Award in 2014, and recipient of the Crime Victims' Rights Award from the Virginia Department of Criminal Justice Services. She also has an extensive record of community service, advising organizations and public bodies on matters such as incarceration policy and victim assistance.

Neff said she is thrilled to be joining the tight-knit Longwood community. She has three children – Jennifer, 31, Patrick, 28, and Samantha, 24 – and four grandchildren, all under the age of five. Her husband, Mike Banks, is a photographer.

In her spare time, she has two main hobbies, each using hands and feet, though in very distinct ways. A longtime musician, she is an accomplished church organist.

And she is a fourth-degree black belt in Tae Kwan Do.

"There's a lot of discipline involved in being a musician, too," she said with a modest laugh. "They actually work pretty well together."

[See: On liberal arts, fine arts and martial arts—10 questions for Longwood's next provost, Joan Neff]

As associate provost at the University of Richmond, Neff has worked in nearly all facets of its academic enterprise, in particular faculty enrichment, budgeting and curriculum revision. From 2009-2011, she served as the provost's liaison to Richmond's curriculum revision task force.

"In her distinguished career here, Joan has earned the respect and admiration of the entire University of Richmond community," said University of Richmond President Ed Ayers. "She is a strong leader, and a kind, delightful colleague. She has been involved deeply in virtually every aspect of academic life on our campus.

"We are sorry to lose her, but Longwood is a perfect fit for her next challenge," Ayers continued. "Having moved between public and private institutions myself, I am confident Joan will make this transition seamlessly and thrive. She is as prepared as one could be for the challenges and opportunities we all face in higher education – ensuring student success, nurturing faculty, and building financial strength for the future."

Neff's appointment concludes an extensive national search that attracted more than 90 applicants for the position. Six finalists visited campus in recent weeks for meetings with the search committee, President Reveley, faculty, staff and students. The search committee, consisting of nine faculty members and all six of Longwood's academic deans, as well as representatives for students and staff, recommended a pool of three finalists to President Reveley, who made his decision after spending extensive time with each and deliberating with the Board of Visitors.

"We are so excited to welcome Dr. Neff to Longwood," said Lehr, the university's Faculty Senate chair who led the search committee. "The search committee worked with such dedication and camaraderie throughout this process. Her dynamic leadership will help the university navigate the significant changes ahead in higher education, while strengthening the core values that distinguish us as a public university with a broad liberal arts focus."

Neff said a substantial part of the draw of Longwood was its size – a place with a scale suited to stability and prosperity, but also the human-scale interaction that is difficult at the many public universities that have pursued

rapid growth.

"My first love, my first commitment, has been teaching and working with students. I picked that up as a primary focus at Longwood," she said. "Longwood is a place where you find teaching on a human scale, while at the same time providing faculty and students with an opportunity to do research, and in very meaningful collaborative ways that larger institutions may not be able to accomplish.

Because of its size, she said, "Longwood's core mission can be defined and integrated and cohesive in a way other institutions' cannot, and continuing to build that culture will be my own focus as I continue to get to know the campus and get to work."

Reveley said Neff will be visiting campus regularly over the rest of the semester, and will officially assume office July 1.

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Longwood University

175 years 1839-2014

2015 News Releases

On liberal arts, fine arts and martial arts—10 questions for Longwood's next provost, Joan Neff

March 17, 2015


Joan Neff

Joan Neff—distinguished teacher and scholar, accomplished musician and martial arts black belt—**was introduced last week** during a reception in The Rotunda as Longwood's next provost and vice president for academic affairs. Currently associate provost at the University of Richmond, she will assume office at Longwood this summer, succeeding Ken Perkins.

First things first: you're a fourth-degree black belt in tae kwon do? How did you get into that?

When my children were teenagers we decided to try it as a family for recreation and fitness. After a few years, everyone else dropped out. I kept at it.

You're also an accomplished church organist. Are your musical and martial arts hobbies complementary?

Yes! Both require self-discipline and practice, as well as coordinating the movements of hands and feet to develop muscle memory. They also both have a rhythmic structure and a sense of harmony. The only time they aren't complementary is when you break a finger blocking a kick, which happened to me a few years ago. Fortunately the break was minor, and it healed quickly and completely.

Does tae kwon do ever come in handy as an academic administrator?

Yes, but not in the way you might imagine. It's a great stress reliever. When I walk into the dojang I have to leave work concerns or issues outside the door. I need to focus on what I will learn that day and make certain that my sparring partner and I don't get injured. At the end of class I feel relaxed and ready to go back to work with a fresh perspective.

Provost is an odd academic title. How would you explain the job description?

The provost oversees the core mission of the university – educating the students. It's the provost's responsibility

to make sure the curricula are of the highest quality, and to ensure the integrity of all academic programs. He or she is also a leader of the faculty, charged with recruiting, nurturing and retaining the best teachers and scholars in the field, and exciting them about the institution's mission.

What attracted you about Longwood?

Longwood's focus on providing students with a strong foundation in the liberal arts and sciences while preserving access and affordability was very appealing to me. I also have a great affinity for the concept of educating "citizen-leaders." Longwood's vision of citizen leadership, represented by the intersection of education, values and service, is the bedrock on which our society is built and can continue to prosper.

But I actually think there's something even more distinctive and special about Longwood. As I talked with President Reveley and others over the last few months, I really picked up on the wonderful and vibrant sense of tradition and continuity that energizes Longwood. The sense of history and place here really complement the mission in a way that you don't find in many institutions.

Finally, I have been impressed from the beginning by the excitement and enthusiasm of the faculty, staff, and students for Longwood's future, and their confidence in the value of the educational experience Longwood provides.

How do you envision your first few months on the job? Do you have a sense already of your big goals, or will there be more of a listening and learning phase?

Several themes have started to emerge as I have met with folks over the past couple of months, but before announcing any big goals, I want to learn more. I have just begun to scratch the surface in those areas, and what I really need is to take some deep dives. My analytical side is very data-driven, and at this point, I need more detailed data – both quantitative and qualitative.

We're in an era of constant talk about transformational change in higher education. Where do you think Longwood should be looking to change - and where should it be resisting change?

A lot of the talk about higher education involves the value proposition; i.e., whether the expense of a college education is worth the money in the long run. Some institutions will be trying to deliver education less expensively by increasing student populations, increasing class sizes, or developing more online courses and programs. The question is whether those changes will diminish the quality of the educational experience. Longwood has a strong tradition of providing students with a high quality affordable education in a residential college setting, and I believe that model is of extraordinary value to society, and will prove resilient. Although it may be possible to adopt certain changes, such as judiciously using online classes or hybrid classes at the graduate level, Longwood should not lose sight of the value of educating undergraduates in a residential setting that focuses on a holistic understanding of what it means to educate citizen-leaders.

You're a sociologist by training, with a long record of scholarly expertise and research. How has that perspective influenced you as a leader?

Being a sociologist allows me to understand the relationship between the individual and the larger social whole to which he or she belongs. That really does help when you're working to unite people of diverse backgrounds and viewpoints in the service of the common good.

What are you looking forward to about living in Farmville?

The thing I am most looking forward to is being a member of a community rather than a resident of subdivision. Don't get me wrong – I have enjoyed living in Richmond, but as the metropolitan area has grown, it has become more difficult to get to know people. I like going to the grocery store and seeing people I know and stopping to chat. It takes longer to shop when that happens, but it makes life much more enjoyable.

Longwood University

175 years 1839-2014

2015 News Releases

Celebrating a lifelong Lancer

February 13, 2015


Nancy Shelton '68

If anyone's blood runs Longwood blue, it is Nancy Shelton '68. Daughter and granddaughter of Longwood graduates, Shelton has made her alma mater her professional home, returning to teach in 1972 and in 1974 being named Longwood's first full-time alumni director—a position she has held ever since.

"For generations of alumni, Nancy has nurtured connections and encouraged thousands to remain engaged in the life of the institution," said Rector Colleen Margiloff '97. "For graduates—many of them multigeneration Longwood families—she has been the welcoming voice and familiar friendly face of their alma mater. Nancy is often the first person people think of when they think of Longwood."

Shelton's 40-plus years as alumni director will come to a close with her retirement this spring, to be followed by a move to Ohio and more time with her husband, Bob; daughters, Jessica and Meredith; and five grandchildren. She made the announcement in a Jan. 9 email to the alumni community.

"One of the most enjoyable aspects has been seeing new high-school graduates as they enter Longwood and watching them becoming young adults preparing for their future life, developing lifelong friendships, beginning their careers and families, and working with them as they re-engage with Longwood," Shelton wrote. Particularly gratifying, she added, is to see many of those graduates re-engage with the university as parents when their own children come to Longwood.

In his own email to campus, President W. Taylor Reveley IV called Shelton's contributions to the Longwood family immeasurable and noted his personal gratitude for the warm welcome she extended to him when he became president in 2013. The president's grandmother, Marie Eason Reveley '40, was a close friend of Shelton's, and his great aunt, Caroline Eason Roberts '42, was an early president of the Alumni Association.

"Longwood has certainly moved through changes during Nancy's 40 years here," President Reveley said. "And her passion, institutional knowledge and commitment to the mission of citizen leadership have played such a fundamental role in what I believe is one of our great institutional accomplishments—maintaining all along our inspiring traditions and identity."

Shelton will officially step down April 1 but will remain in an advisory role until the opening of the new Maugans Alumni Center later in the year. "That building will be a tribute to Nancy's work and the vibrant community of alumni she has been instrumental in creating," the president said. "We will honor her at that time, as well as feting her in the months ahead."

The search for the next head of alumni relations is under way. Members of the search committee are:

- Eileen Anderson '83 – Board of Visitors
- Scott Bacon – Associate Athletics Director for External Relations
- Paul Barrett – Dean of the College of Business and Economics
- Jennifer Conkwright – Administrative Assistant to the Vice President for Commonwealth Relations
- Kathleen Early '92 – President of the Alumni Association Board
- Jim Jordan – Board of Visitors Distinguished Professor
- Bart Mitchell '90 – President of the University Foundation
- Tim Pierson – Vice President for Student Affairs
- Justin Pope – Chief of Staff, Search Committee Chair

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Administration & Finance

Ken Copeland, Vice President

Highlights

- PCI Compliance attained
- Continued progress in conversion to CARDINAL from CARS
- Salary increases take effect on January 15th payday
- Lancer Card Center expanding its reach
- New Residence Hall construction to begin in April

Longwood achieved its first-ever institutional Self-Assessment Questionnaire and Attestation of PCI (Payment Card Industry) Compliance in December 2014. Standards are more stringent beginning in 2015 and we are excited to have laid a great foundation to ensure continued compliance in the future.

Both Finance and Information Technology continue to work very closely together on the conversion from CARS to CARDINAL. The Commonwealth is converting from a 1970's accounting and reporting system to a PeopleSoft system, which requires us to transition our existing interfaces and to learn how entries are to be directly posted into the new system. The CARDINAL go-live date is February 1, 2016. Finance staff have attended numerous meetings conducted by the Department of Accounts, and have already begun to complete required tasks and we are confident that we'll be ready to meet the go-live date early next year.

Our Accounts Payable office recently completed a Department of Accounts Compliance Review for the period of October 1, 2013, through September 30, 2014. Based on this review, Longwood University generally complies with applicable sections of the CAPP Manual (Commonwealth Accounting Policies and Procedures) and no corrective action plan is required.

Longwood's Intercollegiate Athletics Programs report for the year ended June 30, 2014, was issued and the Office of the Virginia Auditor of Public Accounts has begun its audit of the University's FY 2013-2014 financial statements.

Attached is a Statement of Revenues and Expenditures which depicts E&G and Auxiliary budget and actual data as of January 31, 2015. Also attached is an Auxiliary Reserve Analysis as of January 31. Tuition and Fees (including new and amended course fees) for the coming academic year are being proposed for Board approval and will be distributed for discussion at the meeting in March.

Our HR Office continues to work diligently to provide quality service to our campus employees. Late last year, oversight of the payroll office was transferred to HR and the merger paid quick dividends in the implementation and processing of salary increases as of 12/25/14. Our Payroll office staff has been notified by DOA that the current payroll processing system will be replaced and leave reporting will not be part of the new system. An alternative system for leave reporting is currently being contemplated.

In addition to the day-to-day course of business, HR also assisted in completing the CUPA Administrators, Professional, and Non-exempt Positions in Higher Education Surveys. HR employees Frances Huddleston and Daphne Norton diligently braved the bad weather on snow days to ensure payroll was processed timely so our employees were paid on time. Kim Witcher also is to be commended for going above and beyond the ordinary course of business to keep the benefits area going while Fletia Lewis has been out on FMLA leave.

Student employment services works each year with between 500 and 600 students who seek employment through College or Federal Work Study. At the beginning of each semester, the assistance afforded to various departments across campus who are interested in hiring students is quite time consuming. To that end we are preparing a training manual for the student employment area which will provide instructions for co-workers and or management for coverage of this area if the need arises. We are also training a backup Human Resources Employee, Kristy Elliott, to fulfill the duties required in Student employment if needed.

Our HR office, working alongside Cindy Wilson and Brenda Ferguson, was instrumental in orchestrating a great Faculty/Staff Service Awards Program and Banquet on February 13, 2015. Longwood honored 98 Faculty/Staff members and 20 retirees for their years of service to Longwood University and the Commonwealth of Virginia.

The Lancer Card Center is working with Dining and IT to upgrade the current cash registers in the dining hall and other Aramark locations. We are also hoping to install point-to-point encrypted (P2PE) devices to accept credit cards at the new registers. With these new devices, we will be PCI compliant under the new 2015 standards and ready for Chip and Pin. In addition, they will also accept Apple Pay and Google Wallet! This upgrade is scheduled for May.

In addition, we have installed attendance readers in various auditorium-style classrooms around campus. They are a huge hit! Faculty and staff are using them for tracking attendance for everything from music recitals to internship seminars. We hope to continue to grow this piece of the program.

The Card office also continually looks to increase our availability and convenience. We have added a new web platform that allows students and staff to access their Lancer Card information by using their LancerNet ID. We can also expand this to offices that use the system so they can log in and run reports. Campus Police are using this technology to log in and see a student's photo or get information on students that they need to contact. This is a platform that will continue to expand as there is more development in progress. We also continue to sign up local businesses to accept LancerCash. The most recent addition to the LancerCash family is the Uptown Coffee Café – a new and very popular business on North Main Street.

The Real Estate Foundation (LUREF) continues to work closely with WM Jordan, the Architecture team of Little and Franck & Lohsen, and LU staff to develop the new residence halls by ARC. The plan is to construct two 25,000 square foot buildings with four floors each. The facilities will provide approximately 220 beds for main campus. The construction fence is anticipated to go up right after Spring Weekend (4/10-4/11) and is on schedule to be completed by summer of 2016. This is a $16 million project and is the first residence hall that Longwood has built on the main campus since 1992.

The Environmental Education Center, constructed last year at Lancer Park by the LUREF, is actively supporting faculty and student research.

- Dr. Sujan Henkanaththegedar and Longwood Grounds are installing a mesocosm station in the spring. The plan involves setting 12 - 360 gal tanks in March, stock crayfish by early April and run the experiment at least until early June. The study will identify potential impacts of invasive crayfish on native aquatic animals including native Piedmont crayfish and Mountain redbelly dace (a native minnow). This research involves two Longwood PRISM students, and collaborations with Dr. Zachary Loughman at West Liberty University, WV and Dr. Pierter deHart at Virginia Military Institute.
- Dr. Kathy Gee of the Biological & Environmental Science department has teamed up with Dr. Robert Marmorstein to develop a "smart" rainwater harvesting system at the Environmental Education Center. The team will develop a non-proprietary real-time control device that uses weather forecasts from the National Weather Service (NWS) to trigger the release of stored water that then allows the system to capture the forecasted amount of rainfall. This project is working with students through the PRISM program.
- Dr. Chuck Ross will be working with Longwood Facilities and an Environmental Science major Matt Doxey on two alternative energy installations at the Environmental Science building. The first will be a roof-mounted solar energy system that will power lighting for the new mesocosm array and will provide power for the pumping system associated with the cistern project. The second project will be a wind monitoring station to assess the

viability of the site for future wind power. Dr. Ross and his student will be collaborating with students at Grand Turk Community College who will be performing similar installations there under Dr. Ross's supervision. Dr. Ross and Mr. Doxey will also be installing a similar solar energy system in Ecuador in June at a UNESCO site outside of Quito. Assisting with these projects is Zak Dowell, a Longwood alumnus who is co-owner of Sustainable Technology Institute in Richmond.

Finally, in accordance with the Governor's Executive Order 33, 110 designated faculty/staff members submitted Statements of Economic Interest and 13 Board Members completed the Financial Disclosure Statement for the period of January-October 31, 2014 and met the filing deadline of December 15, 2014. The next semiannual filing will be due on June 15, 2015 and will include the period of November 1, 2014-April 30, 2015.

LONGWOOD UNIVERSITY
Statement of Revenues and Expenditures
For Period Ending January 31, 2015

	BOARD APPROVED ORIGINAL BUDGET	YEAR TO DATE ADJUSTMENT	REVISED BUDGET FORECAST 2014-2015		ACTUAL TO DATE 2014-2015	ACTUAL AS PERCENT OF BUDGET	PRIOR YEAR COMPARATIVE ACTUAL TO DATE	PRIOR YEAR COMPARATIVE ACTUAL AS PERCENT OF BUDGET
EDUCATIONAL AND GENERAL								
REVENUES:								
Tuition	34,670,138	890,527	35,560,665		27,700,731	77.90%	24,566,650	76.34%
Fees	1,296,876	(30,000)	1,266,876	1	1,492,412	117.80%	1,634,382	85.41%
State General Fund Appropriation	26,479,817	(1,456,656)	25,023,161	2	15,727,918	62.85%	15,194,138	61.07%
Other Sources	290,500	39,283	329,783	3	318,159	96.48%	179,947	99.67%
Federal Work Study	50,000	-	50,000		-	0.00%		0.00%
TOTAL REVENUES	62,787,331	(556,846)	62,230,485		45,239,220	72.70%	41,575,117	70.22%
EXPENDITURES:								
Instruction	31,000,671	(250,155)	30,750,516		18,745,577	60.96%	17,917,638	62.52%
Public Service	548,574	19,430	568,004		289,095	50.90%	254,080	47.97%
Academic Support	10,539,028	279,255	10,818,282		5,717,106	52.85%	5,980,541	58.33%
Student Services	4,491,285	29,011	4,520,296		2,676,558	59.21%	2,465,993	57.57%
Institutional Support	10,033,635	(504,012)	9,529,623		6,024,997	63.22%	5,611,307	58.05%
Operation and Maintenance of Plant	6,574,139	(531,614)	6,042,525		3,787,045	62.67%	3,734,408	62.23%
Salary Savings	(400,000)	-	(400,000)		(378,012)	94.50%	(445,199)	111.30%
TOTAL EXPENDITURES	62,787,331	(958,085)	61,829,246	4	36,862,365	59.62%	35,518,768	60.21%
Revenues Over/(Under) Expenditures	-		401,239		8,376,855		6,056,349	
AUXILIARY ENTERPRISE								
REVENUES:								
Housing Fee and Sales	19,535,244	285,000	19,820,244		19,965,762	100.73%	19,116,478	99.55%
Dining Fee and Sales	9,321,757	(168,676)	9,153,081		8,902,689	97.26%	8,309,364	96.43%
Comprehensive Fee/Other	21,333,784	296,994	21,630,778		20,052,709	92.70%	20,270,914	94.50%
Federal Work Study	154,300	-	154,300		-	0.00%		0.00%
TOTAL REVENUES	50,345,085	413,318	50,758,403		48,921,160	96.38%	47,696,756	96.50%
EXPENDITURES:								
Housing Services	19,026,153	478,749	19,504,902		9,980,437	51.17%	9,274,136	50.01%
Dining Services	8,746,702	-	8,746,702		7,282,131	83.26%	6,138,743	78.05%
Athletics	8,463,002	697,844	9,160,846		6,390,816	69.76%	6,083,725	68.43%
Other Services	11,103,636	235,755	11,339,391		7,618,719	67.19%	6,872,466	65.95%
Salary Savings	-	-	-		(92,066)	0.00%	8,904	0.00%
TOTAL EXPENDITURES	47,339,493	1,412,348	48,751,841	5	31,180,038	63.96%	28,377,974	62.07%
Revenues Over/(Under) Expenditures	3,005,592		2,006,562		17,741,122		19,318,782	

[1] Includes application fees, course fees, internship fees, ESL program fees, and out-of-state capital fees
[2] Includes $542,707 budget reduction
[3] Includes facility rentals, library fines, payment plan fees, post office income, administrative fees and indirect cost recoveries
[4] YTD adjustments reflect reductions, transfers between programs and insurance pre-payment
[5] YTD adjustments reflect additions or transfers between programs

One-time surplus available for reallocation

Anticipated addition to reserves

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Commonwealth Relations

Courtney Hodges, Interim Vice President

Highlights

- Alumni support continues to increase
- General Assembly update
- Campus prepares for busy summer conference season

University Advancement

Advancement has been busy over these winter months. The end-of-calendar-year campaigns were successful bringing year-to-date cash giving slightly above average for the past decade. Unrestricted annual giving is up 14.25% YTD --- with an especially encouraging 10% increase in the number of alumni donors.

Advancement recently welcomed two new faces to the team, Amy Harris '14 and Katherine Bulifant '13. Amy is overseeing our business operations as Director of University Engagement. Katherine, Director of Campus Philanthropy, coordinates and executes philanthropic efforts across campus, including telefund, Longwood's Campus Community Campaign (faculty/staff giving), and student philanthropy programs. Advancement is also preparing to welcome four additional teammates this spring and summer. Dr. Ken Perkins will be joining the ranks as the Director of Development for Academic Priorities and Provost Emeritus. Recruitment will soon be underway for a Director of Development for University Programs as well as regional leadership giving officers.

The Campus Community Campaign kicked-off in mid-February with a fair deal of friendly inter-departmental competition and rallying of colleagues, resulting in a total of 16 departments reaching 100% participation. Our spring telefund is in full swing and will conclude in late March. Special recognition efforts are launching this spring for Longwood's consecutive (multi-year donors), leadership donors, as well as new and returning donors.

Our annual Scholarship Luncheon was planned, but canceled due to inclement weather. Ninety-one donors and guests planned to attend. Nonetheless, in 2014-15, Longwood University Foundation distributed 673 awards totaling $1,450,700 to 485 different students.

Government Relations

The General Assembly completed its work on Friday, February 27th, after adopting an amended budget for 2014-16 that incudes additional funding for higher education. Longwood is set to receive about $560,000 to restore budget cuts, support in-state undergraduate enrollment growth and implement faculty salary increases under the plan approved by the House and Senate. Longwood fares very well on the capital side as well; the budget the Governor introduced in December authorized bond funds to undertake the University Center project. The budget amendments approved by the General Assembly provide a supplement to complete the purchase and installation of Longwood's Biomass Boiler – one of only a small number of projects funded in the budget. In addition, Longwood is authorized to proceed to detailed planning for two other important capital projects: the Admissions Office and the New Academic Building. The General Assembly's budget plan also includes language implementing some of the recommendations contained in the JLARC reports on higher education and establishing a Joint Subcommittee on the Future Competitiveness of Virginia Higher Education.

More than 20 bills were filed this session that would change how sexual misconduct is reported and handled on college campuses. Four bills ultimately passed the House and Senate. One bill requires university registrars to place a notation on the transcript of a student who has been suspended or expelled or who has withdrawn while under investigation for a violation of a university's code of conduct. Another requires campus police to notify the Commonwealth's Attorney when conducting an investigation of a felony criminal sexual assault. The remaining two bills require responsible employees to report incidents of sexual violence to the Title IX coordinator, who must then notify a review committee. The review committee is directed to review information and determine whether there is a health or safety risk to an individual or to the campus. Jen Fraley, Longwood's Director of Student Conduct and Integrity and University Title IX Coordinator, was closely involved in the discussions and in providing feedback. She believes many of the new requirements cover practices already in place at Longwood, though there will be some impact on policy and communication between the university, law enforcement and students who report sexual misconduct.

Other high-profile higher education legislation was proposed during the session, including a bill approved by the General Assembly that limits the amount of athletic revenue that universities can collect from student fees. The bill sets student fee subsidy limits for universities depending on division level and whether or not the university has a football program.

Several Longwood students traveled to Richmond on February 4th to participate in Virginia21's annual Lobby Day. Virginia21 is an organization that represents the interests of Virginia public college students. Our students met with legislators about key issues and attended committee

meetings at the General Assembly Building. It was great to have them advocating for higher education and representing Longwood so effectively.

Conference & Event Services

For the past four months the Conference Services staff has been meeting with our returning conferences and marketing for new groups for summer 2015. During these nine weeks in 2014 we hosted over 3,400 conference attendees, including over 1,800 potential Longwood future students. With the assistance of our Admissions office many of these teenagers were given special presentations on the opportunities at Longwood. Our office frequently arranges for special activities and sessions on leadership, etiquette, self-defense, applying for scholarships and student loans, and many other timely topics for these groups, all taught by University and local volunteers. Several of our 2015 conferences have already requested these services again this year. Based on fully executed contracts and others currently in negotiations we anticipate gross revenue in excess of $600,000 in 2015.

Our Event Services department is in the final stages of preparing a wedding package that will be used to attract this very lucrative market. The Blackwell facilities will be used as the primary location for these events. Our plan for release of this information to the public with a focus on our alumni is May 1, 2015.

Our AV Services staff has spent a lot of time and resources this year in production of video recording for students, faculty members, and large groups in our recording studio on the ground floor of Jarman. They are also working closely with local and state media in coordinating and filming for the upcoming Sesquicentennial taking place in Farmville and surrounding areas this spring to celebrate the end of the Civil War 150 years ago.

Year-to-Date Comparison of Cash Giving through February 28

Fiscal Year YTD	Annual Giving/ Unrestricted	Restricted	Endowment/C apital	Bequest	Non-Cash/ Gift-in-Kind	Total Cash Giving	Total Donors
2006 YTD	$506,989.92	$465,051.64	$568,367.51		$37,602.99	$1,578,012.06	4,592
2007 YTD	$491,901.47	$376,619.00	$804,233.87		$138,635.83	$1,811,390.17	3,992
2008 YTD	$576,442.99	$490,464.09	$1,242,813.12		$65,468.89	$2,375,189.09	4,012
2009 YTD	$476,447.22	$290,579.54	$697,404.57		$100,476.80	$1,564,908.13	3,265
2010 YTD	$435,823.88	$636,384.77	$980,587.29		$44,933.38	$2,097,729.32	3,851
2011 YTD	$484,234.49	$393,831.58	$570,486.06	$735,079.26	$65,615.17	$2,249,246.56	3,664
2012 YTD	$316,718.21	$504,629.46	$932,041.54	$132,021.26	$36,895.68	$1,922,306.15	2,964
2013 YTD	$337,633.91	$473,192.26	$627,699.70	$83,711.25	$415,449.78	$1,937,686.90	3,161
2014 YTD	$330,423.57	$523,503.85	$941,435.42	$1,120,474.67	$19,946.82	$2,935,784.33	3,105
2015 YTD	$377,520.79	$682,009.31	$570,292.22	$320,376.65	$256,153.37	$2,206,352.34	3,418

Historical Performance Comparison

Fiscal Yr	Total Contributions (Accrual)*	Total Cash	Annual Giving	Total # of Donors	Alumni Participation	Notes
1996	$1,245,239	$1,139,997.36	$242,337.41	6,469	n/a	
1997	$1,593,319	$1,558,793.81	$244,494.65	6,634	n/a	
1998	$4,708,123	$4,523,155.20	$353,589.97	6,720	**28.56%**	
1999	$1,831,576	$1,565,983.56	$365,821.55	6,369	25.89%	
2000	$7,924,958	$1,978,093.96	$482,530.04	6,681	26.32%	
2001	$4,421,326	$4,664,498.93	$617,950.74	7,485	26.44%	
2002	$4,015,855	$4,708,099.53	$588,388.92	**7,676**	25.63%	
2003	$3,163,952	$4,009,354.80	$634,753.92	7,061	23.13%	*Close of 1st Campaign*
2004	$1,785,005	$3,107,662.50	$731,027.37	6,955	21.18%	
2005	$2,619,624	$2,932,449.26	$809,203.41	7,074	19.96%	
2006	$3,357,761	$3,109,371.22	$846,750.29	6,566	18.86%	
2007	$5,244,501	$2,657,360.43	$834,612.99	6,088	18.00%	
2008	$4,874,413	$2,741,177.62	**$941,561.19**	5,661	16.36%	
2009	$2,589,010	$2,273,453.95	$762,623.50	4,838	13.12%	
2010	$4,285,338	$4,913,388.32	$743,983.86	5,471	13.69%	
2011	$5,467,831	$5,538,744.46	$758,529.94	4,969	11.41%	
2012	$3,413,752	$2,562,474.22	$614,995.65	4,486	10.97%	
2013	**$8,255,002**	**$6,085,191.95**	$552,388.62	4,304	10.15%	*Close of 2nd Campaign*
2014	$2,750,800	$4,622,329.37	$523,079.41	3,962	9.47%	
2015	-----	*$2,206,352.34*	*$377,520.79*	*3,418*		*thru 2/28/15*

**Figures reported in audited financial statements.*

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Intercollegiate Athletics

Troy Austin, Director of Athletics

Highlights

- Longwood Student-Athlete Conduct Standards
- Longwood Athletics Fundraising Events
- Progress in the Big South Tournament
- The passing of Longwood Athletics legend Jerome Kersey

Longwood Student-Athlete Code of Conduct

Longwood has a strong culture and set of policy guidelines regarding the behavior of student-athletes, above and beyond the campus disciplinary system that governs all students. These policies are the product of careful deliberation and review, and reflect both our legal obligations and the educational values we hold for all students. Those values include student safety, accountability, personal growth and development, and fairness to all. Such policies are and should continue to be regularly reviewed in a thoughtful manner, in which their full complexity and implications can be fully explored. In the meantime, they are and shall be fairly and equitably applied.

Longwood Athletics Fundraising Events

Athletics and College of Business and Economics Event Weekend – October 16th & 17th
Following the success of the 2014 Longwood Athletics Benefit Celebration, which raised more than $62,000 for Longwood Athletics – including nearly $12,000 directly for student-athlete scholarship support, the event will make its return for a third edition this fall. The 2015 LABC will take place on Saturday, October 17th at the Omni Hotel in Richmond, VA. The event is returning for a consecutive year in large part due to popular demand.

Trey Eggleston, Director of Athletic Development, noted that the positive feedback we received from attendees this past October really demonstrated the benefits of moving to an annual event. Given the financial success and the level of alumni engagement we were seeing through the LABC, we see real value and opportunity in holding the LABC again in 2015.

While additional details for this year's event will be forthcoming later in the year, Eggleston was excited to announce a partnership between the Department of Athletics and the College of Business and Economics (CBE) for the 2015 LABC, which will include the CBE's Golf Tournament fundraiser in Richmond, also on the 17th. "It presents a strategic opportunity for collaboration across the University that will enable each entity to engage alumni and constituents in exciting new ways. October 17th will be more than a day just for Athletics or just for the CBE, it will be a day for Longwood!

Lancer Club Open – Saturday, May 30th
The Lancer Club Open returned as a signature event of the Lancer Club and Athletics Department in 2014. This year's edition will once again take place at The Manor Golf Club in Farmville on Saturday, May 30th. The golf outing will feature a single flight with a start time at 10am. On course games and contests will feature the opportunity for participants to interact with Longwood student-athletes. There is no better opportunity to join fellow alumni, friends, and coaches in a relaxing and fun environment, all while supporting the student-athletes who proudly don the Lancers uniform.

Progress in the Big South Tournament

The close of the 2014-15 basketball season was highlighted with a signature run by the Longwood men's basketball in the Big South Basketball Championships in Myrtle Beach, SC. The team led by head coach Jayson Gee squad advanced to the semifinal round of the Big South tournament for the first time while also becoming the first 9-seed to do so in Big South history, knocking off the regular season champion and number 1-seed Charleston Southern in the process. Junior, Shaquille Johnson was named to the All-Tournament Team after averaging 17 points and 12 rebounds over the course of the three game Lancer run. The tournament also marked the close of the Longwood careers of seniors Quincy Taylor and Tyler Akers. Taylor, as he did so many times this season for the Lancers, helped to carry the load in the semifinal round, finishing with 23 points. Akers capped off the tournament run with his first career three-point make in the final moments of the loss to Winthrop

The passing of Longwood Athletics legend Jerome Kersey

The passing of one of Longwood's most prominent alumni, Jerome Kersey ('84, '06), was felt across the nation. From Farmville to Portland, Ore., friends, family and fans of the 17-year NBA veteran and former Longwood basketball star expressed their dismay at the sudden passing of a beloved basketball star and community activist. Kersey, who starred at Longwood from 1981-84 and went on to play nearly two decades in the NBA, passed away on Feb. 18 at the age of 52 due to complications related to a blood clot that traveled from his legs to his lungs.

Kersey's impact as a player and community figure was so great that the Portland Trail Blazers, the NBA franchise who Kersey played with for 11 seasons, honored him with a 'Celebration of Life' in Veterans Memorial Coliseum that included speeches from the team's president and CEO, team chaplain and former teammates. The turnout to the event filled the floor of the coliseum and much of the lower level of the arena.

In Farmville, Longwood devoted the following day to a series of remembrances on the university's website, the athletics website and various social media outlets. An obituary, a comprehensive photo gallery and a collection of comments and reactions to Kersey's passing took up the university's news feed for the next several days. The university honored Kersey publicly at the next home men's basketball game on Feb. 21 versus Winthrop, unveiling uniform patches with Kersey's number, 54, that both the men's and women's teams wore for the rest of the season.

Kersey will be highlighted in the upcoming Longwood alumni magazine, partly for his passing but largely for his selection as the recipient of the university's William Henry Ruffner Alumni Award. Kersey was chosen for the award before his death and will be honored posthumously at the alumni award ceremony on March 20. The award recognizes "alumni who have achieved success and national distinction in both their personal and professional lives, embodying the concept of citizen leadership."

Finally, Kersey's family celebrated his life in a moving ceremony March 14 in his hometown of Clarksville. President Reveley attended, and I was deeply honored to speak at this event in honor of a true citizen-leader whose deeply consequential life ended entirely too soon. Longwood will be looking to consider significant and proper lasting ways to memorialize Kersey.

Student Affairs

Tim Pierson, Vice President

Highlights

- Missing student search
- Norovirus Response
- Potomac Healthcare Solutions Contracted
- Title IX
- New Organization of Police Department

Over the last few weeks, our thoughts have weighed heavily with the search for AJ Hadsell, the Longwood first-year student who went missing while home in Norfolk over spring break. We have been in close contact to provide support to her friends and neighbors on campus, and spoken regularly with student leaders, who have organized a ribbon campaign and been active trying to get the word out on social media. The investigation itself is in the hands of Norfolk police, but the Longwood police have put themselves at the service of investigators for anything they may need. We continue to hope and pray for her safe return.

Earlier in the semester, an outbreak of the highly contagious Norovirus closed Hampden-Sydney College for a week in January. Longwood University activated an Incident Command Center to monitor the spread of the virus and the effect on our campus. Various individuals and departments across campus came together to implement protocols to help staff effectively track and contain the spread of the virus. This group played a major role in the containment of the virus and limiting the impact to Longwood University.

Longwood signed a contract with Potomac HealthCare Solutions (PHS) to be Longwood's management partner for Student Health Services. Potomac has broad experience managing and delivering healthcare to organizations including the U.S. Armed Forces, the Department of Health and Human Services, Fairfax County and companies such as Chrysler. The current student health center is staffed with one full-time physician's assistant, one full-time nurse-practitioner, three temporary RNs, and a temporary administrative assistant. The size of that staff is not expected to decrease, and both full-time advanced clinicians will transition to become Potomac employees. The goal of this change in management is to expand offerings, improve turnaround time, and increase appointment hours, including same-day appointments.

One of the most uplifting items to highlight is the record turnout for the Annual MLK Service Challenge. Over 200 students, faculty, and staff engaged in a day of service at seven different sites in the community. Upon conclusion of their service, participants gathered at the Moton Museum to debrief and reflect on their experiences.

A strategic achievement of the semester in Student Affairs is the reorganization of the Police Department staffing structure. The new structure allows the department to schedule officers to 12-hour shifts with adequate supervision. Thus, the driving force behind the reorganization of decreasing response time, increasing police coverage, and ensuring adequate supervision will be addressed.

Student Conduct and Integrity, University Title IX

Student conduct cases of all kinds have increased 12% as compared with this time last year. While the number of Conduct and Honor Board cases has remained fairly constant, administrative hearings under the sexual misconduct policy have increased substantially as awareness regarding the process and resources has grown. The office welcomed the addition of an Assistant Director in January who, in addition to general student conduct work, is spearheading programming efforts and educational initiatives for the office.

So far this year, the Title IX office has received 79 reports of notice. Of those reports of notice, the office has coordinated 22 Title IX inquiries and investigations, and has provided resources and offers of accommodations in the remaining cases where the University does not have jurisdiction or formal complaints. Providing resources and access to accommodations as well as conducting inquiries and investigations are required when the university receives notice of behaviors that fall within the spectrum of behaviors detailed in the Sexual Misconduct Policy.

The General Assembly passed a number of bills regarding response to campus sexual assault. Title IX coordinator Jen Fraley was involved in those discussions. Jen believes many of the new requirements cover practices already in place at Longwood, though there will be some impact on policy and communication between the university, law enforcement and students who report sexual misconduct. Longwood will work with the Attorney General's office to ensure we are in full compliance with these or any other new legal requirements.

Dean of Students Area

The Dean of Students office received and responded to over 2300 incidents during the fall semester and as of 02/20/15, 732 incidents during the spring semester. The Care Team has managed cases involving 564 current students, 20 non-students, and 13 students who wished to be re-admitted or admitted. One of the most involved incidents was the oversight of the

University's response to the December death of student Riley Cole, including the organization of a memorial service that was attended by over 400 people.

Disability Resources

To date, 334 students have registered and are receiving accommodations through the office. The usual "spike" in numbers is expected once Midterm grade estimates are released. Longwood currently provides resources and accommodations to approximately 7-8% of the student population, which is higher than the national average of 5%. Attention deficits and learning disabilities continue to be our most highly populated demographic served.

To be a part of the concentrated retention effort, Disability Resources will implement a program called *ODR Empowers* beginning fall 2015. This two-day orientation, prior to New Lancer Days, is specifically for students who are registering with Disability Resources and will include presentations and workshops focused on helping them and their guardians adjust to the higher education environment, as well as introduce them to all the available resources Longwood has to offer.

Commuter Life

The Off Campus Orientation session has been changed from a campus meeting to an online video. The video was recorded earlier this year and will provide an opportunity for students to reference information throughout the year. The video provides presentations from town officials, Longwood staff members (including campus police, RCL, and Student Conduct and Integrity), and other helpful resources (including Virginia Legal Aid).

Occupancy Management

Mercury, the new online housing assignment software, has been successfully implemented. This software offers the ability to further streamline all housing processes including continuing student housing registration, room change request, new student application collection, register to stay, and off-campus intent. Over 1,300 continuing students utilized Mercury to register for a Longwood managed apartment space for the 2015-2016 academic year. In March 2015, Mercury will be utilized by students to register for a main campus residence hall.

Residence Life

During the annual Winter Training and Leadership Workshop, the Residence Life trained 146 (Desk Aides, Desk Supervisors, and Resident Assistants) student staff members on a variety of residential issues. Two new Resident Assistants and 17 new Desk Aides were welcomed.

The six professional staff supervisors worked to address student concerns in living areas through 1680 activities, entitled Community Connections, and numerous hall specific programming efforts. Residence Life staff organized numerous traditional Campus Connection events (Sand Soccer, Only Love, Longwood's Got Talent) due to a demand from students. RCL will continue

to program throughout the year with more traditional events expected to reoccur thanks to strong support.

The Residence Education Coordinators and other supervisors have responded to 823 incident reports for issues ranging from facilities concerns to suicidal thoughts/ideation.

Residential Operations
Student interest in staying in residence during closings has continued to increase. The Winter Break registration process produced over 300 responses.

With respective residence community focus, Residential Operations joined the Incident Command Center in the addressing of the Norovirus. In partnership with various campus and community representatives, many worked closely with students and staff members to effectively take precautionary measures to address this highly contagious virus. Preventative efforts, coupled with good communication, helped to minimize the campus community threat.

Student Engagement Unit

The Citizen Leadership and Social Justice Education area coordinated several major programs and events:

Joan of Arc Leadership Program continues restructure and growth. 61 students participated in the program fall semester 2014, and 56 students are enrolled this spring. Joan of Arc has seen increased numbers in the Emerging Leaders, the first tier of the program, as well as increased enrollment of men, a targeted subpopulation of students.

Alternative Break Program, a student organization, is offering two trips this spring break for students to engage in service learning while exploring social issues and discovering new things about themselves through education and purposeful action. 48 students applied to participate in an environmental conservation trip to the Grand Canyon and 13 have been selected to attend, while 18 applied to participate in a refugee empowerment trip to Jacksonville, FL, and 13 were selected to attend.

MLK Challenge—Over 200 students, faculty, and staff engaged in community service projects/activities in an effort to give back to the community at seven service sites that included Clean Virginia Waterways, FACES, Friends of High Bridge Trail, Habitat for Humanity, Keysville Nursing Home, New Life Church, and Zephyr Stables and Riding Rescue. The day culminated with an afternoon debrief and reflection at the Moton Museum.

MLK Oratorical Competition—Students from Prince Edward County High School, Longwood University, and Hampden Sydney College took part in an oratorical contest based on the theme, "One Community: Injustice Anywhere is a Threat to Justice Everywhere." A winner was selected from the high school and another from the college level, each presenting his/her winning oratory at a reception at the Moton Museum.

MLK Symposium featuring Tim Wise—Speaker Tim Wise presented a lecture, "Resurrecting Apartheid: From Ferguson to the Voting Booth to the Border—Combating Racism in the Post-Obama Era," to an audience of over 200 students, faculty, staff, and members of the community followed by a spirited question and answer session and a reception in the Rowe Gallery.

Common Ties: A Night of Reflection and Celebration—A reception bringing the Longwood University and Farmville communities together to honor the legacy of the Civil Rights Movement and forge a new bond of cooperation and collaboration was held at the Moton Museum and attended by 50 guests. The event featured a silent auction to help raise money for future social justice programs and activities, presentations from the oratorical winners, and entertainment from the BASIC gospel choir and the Longwood Jazz Ensemble.

MLK Bus Trip—An interactive experiential program attended by 28 Longwood and Hampden-Sydney students provided an opportunity to learn about, process, and reflect upon the contributions of Dr. King, the Civil Rights Movement, and African American culture and heritage. The students visited several historic sites in Washington, DC, including the MLK monument, Roosevelt memorial, Lincoln and Jefferson memorials, and the Smithsonian Anacostia Community Museum.

Fraternity and Sorority Life

Preliminary reports indicate another successful new-member recruitment period for the Interfraternity Council, College Panhellenic Council, and National Pan-Hellenic Council chapters. In January of 2015, 117 bids were issued to new members through the CPC recruitment process and currently, 553 women are involved in the CPC sorority community. In February of 2015, 63 bids were distributed to new members yielding 277 members within fraternity community.

Additionally, the National Pan-Hellenic Council has seen a lot of growth in the last year as their membership in fall 2013 of 11 active members, has grown to 29. This growth and stability are critical to the continued success of this community. The FSL staff are pleased to also report that Alpha Beta Psi, a local sorority, was at 13 prior to recruitment, and added 7 new members this semester.

Highlights from the Fall Term 2014 Greek Grade Report, included:

- 753 (17.1% of all LU students) students participate in Fraternity and Sorority life with an average cumulative GPA of 3.0
- 533 (18.46% of all LU Women) Sorority women have a cumulative GPA of 3.0
- 220 (14.67% of all LU Men) Fraternity men have a cumulative GPA of 2.9
- The average GPAs of both men and women in fraternities and sororities exceed the average for their peers who do not participate in Greek life.

University Center and Student Activities

Over 202 student organization presidents and treasurers have participated in mandatory student organization information sessions spring of 2015. To date, 147 student organizations have completed all the required steps to be considered active and in good standing this semester.

Lankford Student Union received a face lift including a fresh coat of paint, some furniture re-upholstery, and new carpet in the main office. Subsequently, use of the Ballroom space has increased, and over 341 unique reservations from August 2014 to date have been received. Of these, over 30% are recurring weekly meetings.

Lancer Productions sponsored a presentation and dining opportunity with Dr. Terrence Brown, which drew over 80 people to Jarman from both the Longwood and local communities and 20 students and 10 faculty/staff to the dining hall for informal conversation over dinner.

Wellness Unit

Counseling Center
The Longwood Parents Council fully funded a grant which will allow the Counseling Center to partner with other campus partners to provide testing for Learning Disabilities and ADHD. The grant provided funding for the start-up costs as revenue from the assessments will allow this initiative to become self-sustaining. The Counseling Center aims to launch the program this summer.

In addition, the Longwood Parents Council fully funded a grant which allowed the Counseling Center to subscribe to a year of online mental health screenings. The Counseling Center has purchased the online screening and initiated this service to the Longwood community. http://screening.mentalhealthscreening.org/longwood

Campus Recreation hosted the Welcome Back Wellness Expo the first week of classes to highlight fitness and wellness programs available to Longwood students this semester. Various wellness partners from across campus promoted their wellness based activities.

Longwood Golf Course
Longwood University continues to discuss the future of the Longwood University Golf Course and the management of The Manor Golf Course. The Master Plan will provide guidance and direction to assist in this decision.

Police Department

Department Reorganization
This quarter saw the fruition of two and a half years of work as the "First Bite" of the process of the re-organization of the Longwood University Police Department. Each year the LUPD faces increasing calls for service and increasing response times to those calls. To help meet these increases, the LUPD is in the first step of overall department reorganization. On February 13, 2015, two officers were promoted to the Rank of Lieutenant (Deputy Chief), Deputy Chief of Operations and Deputy Chief of Administration. In addition, two Longwood Police Department Officers were promoted to the rank of Sergeants.

Operations
Each year the Longwood University Police Department is faced with an increasing number of operational challenges, along with managing the day-to-day functions within the department.

Operations must plan and staff numerous events/incidents. The Operations section must create an Incident Action Plan (IAP) for each event to ensure a definitive plan of action as well as clear communication and staff responsibilities. All events and incidents require multiple officers to be assigned; the Operations Chief must manage these events and staffing while still continuing the presence 24 hours a day, the normal law enforcement presence. In addition the Operations Section must continually coordinate with all outside public safety partners and maintain a cohesive working relationship to allow for the complete of the LUPD mission. As the university grows, so will the needs of the Operations Section.

Administration

Much of the Administration Deputy's time has been spent this quarter managing the many changes in the reporting and response activity required by the Clery Act. A major focus was the writing and vetting of two major University Policies that are now required. In accordance with the Clery Act and the Department of Education requirements, the University must have a Timely Warning Policy and a Missing Student Policy adopted by the University and signed by the Board of Visitors. The Department of Education is focusing on policies this year with the new requirements on sexual assaults, domestic violence, dating violence and stalking. Adoption of the Timely Warning and Missing Student policies will put Longwood University in compliance with the DOE requirements.

Emergency Management continues to build and promote the University's emergency preparedness and response capabilities. In those efforts, we partner with the Town of Farmville, the County of Prince Edward and the Commonwealth of Virginia. During the first quarter of 2015 the office of Emergency Management:

- Coordinated with Facilities Services, the Longwood Health and Wellness Center, the Virginia Department of Health and other partners to respond to the needs of community members who presented with Norovirus-like symptoms. This included providing education about the virus, tracking cases, and dispatching cleaning crews in efforts to limit the spread of the illness.

- Launched the testing phase of the application LiveSafe for students, faculty and staff to use in the case of an emergency. Once fully deployed, this tool will provide users with two way communications between the LU Communications Center and individuals. Student leaders will participate in the marketing of the application as well as the education of community members.

- Developed a standardized curriculum for LU students who desire to serve as interns in the Police Department. Five interns each semester will study emergency communications, emergency management, patrol operations, integrated security services, public safety operations and law enforcement administration. During their internships, students will also have opportunities to attend a Local Emergency Planning Committee meeting and interact with professionals working in the fields of emergency management and public safety services.

A Campus Lockdown Simulation and evaluation program was completed by Integrated Security. An action report was developed that will be used to train on issues identified during simulation.

Parking Services is working on the expansion of faculty and staff parking availability in the Northeast quadrant of the campus. This is a joint project with the Longwood Real Estate Foundation through the signing of a new lease. This will allow the development of a parking facility at 106 Venable Street, property recently purchased by the Real Estate Foundation. Planning and discussions are taking place with the Foundation, Capitol Planning, Town of Farmville, and Parking Services. As all agree this property has potential for adding significant parking space for Longwood University staff.

INFORMATION ITEM

Report on Student Housing

CURRENT OCCUPANCY

As of February 25, 2015, 2853 students are assigned to main campus residence halls, Lancer Park, Longwood Landings, and Longwood Village.

Category		Continuing Students	New First Time Freshman	New Transfer Students	Readmitted Students	Exchange Students	TOTAL RESIDENTS
Spring 2015 (2-25-15)	MC	1505	9	24	5	1	1544
	APTS	1281	0	19	7	2	1309
	TOTAL	2786	9	43	12	3	2853
Spring 2014 (2-26-14)	MC	1586	6	20	8	12	1632
	APTS	1186	0	22	11	1	1220
	TOTAL	2772	6	42	19	13	2852
Spring 2013 (2-25-13)	MC	1830	9	35	21	17	1912
	APTS	799	0	26	11	1	837
	TOTAL	2629	9	61	32	18	2749

STUDENT DISTRIBUTION	Spring 2015	Spring 2014	Spring 2013
On-Campus Residents	1544	1632	1912
Longwood Landings	367	376	383
Lancer Park	624	623	234
Longwood Village	318	221	220
TOTAL	**2853**	**2852**	**2749**

CLASS DISTRIBUTION	Spring 2014	Spring 2014	Spring 2013
Freshman	880	855	813
Sophomore	775	837	797
Junior	659	640	571
Senior	536	507	550
Exchange	3	13	18
TOTAL	**2853**	**2852**	**2749**

GENDER DISTRIBUTION	Spring 2015	Spring 2014	Spring 2013
Females	1898	1880	1826
% Female	66.5%	65.9%	66.4%
Males	955	972	923
% Males	33.5%	34.1%	33.6%
TOTAL	**2853**	**2852**	**2749**

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Facilities Management and Real Property

Richard Bratcher, Vice President

Highlights

- University Master Plan enters Options Development Phase
- Office of Sustainability Update

Longwood University's leap into 2015 saw a successful resumption of classes, the completion of the Cunningham demolition, plans for several capital and renovation projects, some abnormally frigid temperatures, and an atypical amount of snow. Facilities Management and Real Property personnel contributed to all of these successful activities and mitigating the weather-related trials.

Capital Projects

Longwood's capital projects continue to move forward in an orderly fashion with high quality results. Renovation of Blackwell Hall for the Maugans Alumni Center is nearing completion and renovation of Willett Hall is substantially complete with the contractor correcting punch list items.

Cunningham Residence Hall and Upchurch University Center:
Demolition of the Cunninghams is completed, and fine-tuning of the design of the Upchurch University Center is nearing completion. We anticipate awarding a construction contract for an early site package beginning early this fall. We anticipate awarding a construction contract for the building early 2016.

Sophomore Residence Halls:
The A/E is revising the construction documents in response to Building Code Official comments. We anticipate the project to remain on schedule with construction starting this spring

Student Success Center:
Funding for project construction has been approved. With this approval of construction funding, the A/E has started preparation of construction documents. We anticipate construction to start this winter.

Technology Center TV Studio Equipment:
Computers have been purchased and are being installed. A solicitation for the Television Studio equipment has been advertised. We anticipate the equipment to be installed after the end of the spring semester. The goal is to allow faculty to work with the equipment over the summer month and be prepared to teach classes in the studio the fall semester.

Admission Building and New Academic Building:
Based on the status of appropriation bills for the current legislative session, we are anticipating receiving authorization to proceed to the preliminary design phase for both projects. Currently we are working with the projects design team to be prepared to start preparing preliminary design phase documents when funding is available.

See more information on campus construction project at: http://construction.longwood.edu/

Capital Project Schedules

Project	Project Start	Current Status	Completion
Willett Hall HVAC	September 2012	Post-Construction Phase	Spring 2015
Maugans Alumni Center	March 2012	Construction Phase	Spring 2015
Sophomore Residence Halls	September 2013	Design Phase	Summer 2016
Student Success Center	August 2012	Design Phase	Spring 2017
Additional Biomass Boiler	August 2013	Design Phase	Summer 2017
Upchurch University Center (Student Union)	August 2008	Design Phase	Fall 2017
New Academic Building	July 2013	Design Phase	Summer 2018
New Admissions Office	July 2013	Design Phase	Summer 2018

Campus Impact Planning

Upchurch University Center: Demolition of the Cunningham Residence Halls is complete. Preliminary site work is anticipated to commence in early fall 2015, and building construction is anticipated to commence in early 2016. The Jarman parking lot will be closed except to construction vehicles. Safe pedestrian paths created during demolition will remain in place for construction.

Maugans Alumni Center: The construction site is appropriately contained. Redirected pedestrian walkways are working smoothly. Depending on the project completion date, graduation faculty-staff lineup both graduation ceremonies may be relocated from the intended location of the Blackwell Hall exterior stairway.

New Residence Hall: The project, adjacent to the ARC location, will begin after graduation. The construction site will be appropriately contained. There will be a loss of parking in the Vine, Redford, and Race Street area. Parking Services will coordinate parking alternatives and notify the campus.

Willett Hall: This project will be completed in early summer. The building will return to normal access and activity.

Student Success Center: Building construction is anticipated to commence in Winter 2015/2016. Events and student activities impacted by construction have alternate locations. A temporary roadway will be created from Redford Street to Lankford Mall for deliveries. The west access to the garage will be closed during construction; however, the east access will remain open.

Coyner Hall: Coyner will close after graduation for approximately one year to install a new heating, ventilation, and air conditioning system as well as a new roof. The current occupants will be relocated. The construction site will be secured for safety and the work will encumber some or all of the adjacent parking. Parking Services will coordinate alternatives and notify the campus.

Summer Projects: Several minor construction projects will impact the campus this summer: -

- Greenwood Library chiller controls replacement
- Graham Hall roof replacement.
- Installation of the Lankford balustrade.

The Campus Planning and Development Department will coordinate with building users to mitigate potential impacts.

The University Master Plan for 2025

The *Analysis and Discovery* phase of the University Master Plan, which began in September 2014, was concluded in January 2015. The firm of Cooper, Robertson & Partners (CRP) collected data about Longwood's facilities, space utilization, transportation systems, mechanical and civil engineering, athletics programs, and campus infrastructure. The planning team visited all of the University's Farmville facilities and Hull Springs Farm. Nearly 80 interviews and meetings were held with Longwood faculty, students, and staff, as well as with community groups and local government agencies, to gather input and ideas about Longwood's future physical development. A presentation of findings will be presented to the Board of Visitors on March 27th.

The second part of the study - the *Options Development Phase* - commenced in late January. During the next five months, CRP will develop options for how future program elements might most sensibly be arranged on and around Longwood's campuses. The options will be evaluated for program conformance, place-making qualities, cost and benefit, and general adherence to the strategic goals of the university. As this phase progresses, the best aspects of several options will be refined for presentation to the Board of Visitors in June, 2015.

The Office of Sustainability-Update

The Office for Sustainability (OFS) oversees the University's ongoing, campus-wide recycling programs and works with other departments in sustainability initiatives.

For the fiscal year July 2013 through June 2014 OFS recycled:

- 55.98 tons of cardboard from Dining, Facilities, Print Shop, and Material Management operations that were compacted, baled, and sold for paper recycling.
- 2,580 pounds of aluminum cans that were shredded, baled, and sold for scrap value.
- 29,860 pounds of paper, collected in various containers from around campus and shredded, compacted, and sold for paper recycling.
- 4,860 pounds of plastic bottles, shredded, compacted, and sold for recycling.
- 16,931 pounds of steel, 35,460 pounds of tin, 180 pounds of brass, and 118 pounds of copper collected from facilities operations, plumbing, HVAC, steam systems, and other operations and sold for scrap metal.
- Batteries collected from offices across campus and disposed of through a hazardous waste disposal service.
- Used printer cartridges were collected and returned to the manufacturer for recycling.

Other Sustainability initiatives include:

- Landscape and Grounds uses a state certified nutrient management plan to reduce instances of over-fertilizing and to prevent nutrients from impacting water quality in waterways. Full time employees of the department are state certified fertilizer applicators.
- Food waste is collected 5 days a week and turned into pulp which is then added to and blended with organic waste from landscape operations. This waste becomes compost, which produces 55 to 60 yards of organic material a year that is then used in flower and landscape beds.
- The energy-saving lamp post retrofit program re-lamped the existing lamp fixtures to more efficient LEDs and installed wireless radios in each fixture. This enabled us to create a database, monitor the operational status of each fixture, and identify problems quickly. This will reduce labor and bulb replacement in maintenance.
- Willett Gym was entirely re-lamped in LEDs for efficiency during a recent renovation.

10

Strategic Operations

Victoria Kindon, Vice President and CIO

Highlights

- Admissions Applications and Deposits Continue to Trend Well
- Partnership with Academic Chairs for Retention Innovation Challenge

The Division of Strategic Operations advances Longwood's mission by building and strengthening connections with students at every stage of their relationship with the university – as prospective students, current students and active alumni. The division works to nurture lifelong relationships through personal interactions and connections, supplemented by the careful analysis and application of data and state-of-the-art information technology. The division comprises of the offices of University Marketing and Communications, Information Technology Services, Alumni Relations, and Enrollment Management and Student Success.

Retention and Admissions Updates

Retention Update

Freshman-to-sophomore retention held relatively steady for the 2013 cohort as did fall-to-spring retention for the 2014 cohort.

	Freshman Fall Enrollment	Freshman Spring Enrollment	Freshman Fall-to-Spring Retention Rate	Sophomore Fall Enrollment	Freshman-to-Sophomore Retention Rate
2010 Cohort (Class of 2014)	975	*Data not warehoused*	*Data not warehoused*	761	78.70%
2011 Cohort (Class of 2015)	1,055	*Data not warehoused*	*Data not warehoused*	841	80.71%
2012 Cohort (Class of 2016)	1,007	920	91.36%	809	81.55%
2013 Cohort (Class of 2017)	1,091	1,009	92.48%	872	80.89%
2014 Cohort (Class of 2018)	1,074	996	92.74%	*TBD*	*TBD*

Admissions Update

Applications for fall 2015 first-time, full-time freshmen continue to exceed those for fall 2014.

We also expect to receive more interest as we extended our application deadline from March 15 to April 1 due to the disarray the winter weather caused for students in completing applications. The winter weather has also affected the pace of deposits throughout the winter months.

Strategies to yield high-achieving students who have been admitted but have yet to deposit are under way. The deposit deadline is May 1.

We are also seeing promising growth in our ability to attract out-of-state students.

	For Fall 2013 (as of March 15)	For Fall 2014 (as of March 15)	For Fall 2015 (as of March 15)	YOY Comparison
Applications	4133	4414	4551	+3%
Out-of-State Subset	*220*	*440*	*632*	*+44%*
Admitted	2963	3059	3101	+1%
Out-of-State Subset	*136*	*214*	*340*	*+59%*
Deposits	278	293	269	-8%
Out-of-State Subset	*8*	*11*	*20*	*+82%*

Enrollment Management and Student Success

Retention Innovation Challenge

Strategic Operations is facilitating a challenge among academic departments to develop new, innovative and cost-effective approaches to support the academic achievement of students in their first semester. Data analysis indicates that students who are on academic probation (GPA of less than 2.0) after their first semester are much less likely to return to for their sophomore year than those who are not struggling academically after that first semester. Therefore, the goal of the challenge is to increase the number of freshmen in good academic standing at the end of the fall semester. The challenge was presented to department chairs in January, and the due date is July 1, 2015, for the submission of initiatives that can be implemented this fall. The department that implements the most innovative initiative will receive $5,000.

Full-time Writing Center Director Approved

Increased demand for the services provided by the Writing Center has resulted in the allocation of funding to expand the director's position from part time to full time. Housed in the Center for Academic Success, the Writing Center is an integral co-curricular program essential to the academic success of our students. The Writing Center has been in operation for many years, but its role is now growing to support the university's Quality Enhancement Plan, which is focused

on student research. In addition, the center's role in providing students with a strong foundation in the liberal arts and sciences is more critical than ever. The full-time director will annually teach two sections of the introductory writing course that is part of the academic core curriculum (general education). He or she also will serve as a liaison with the stakeholders of writing on campus, ensuring a strong collaboration with academic affairs. Recruitment for the position is under way with an expected start date of July 2015.

University Marketing and Communications

Social Media Engagement Increasing Significantly

One of the key benefits of employing social media platforms is that it gives Longwood and our audiences the ability to engage in dialog more so than non-interactive information sharing. As a result, audience engagement is a key metric in our communications strategy. In fall 2014, we saw huge leaps in our ability to engage with our audiences online, progress that reinforces our brand recognition and alumni involvement.

All Social Activity (FB, Twitter, Instagram, YouTube)	**Fall Semester 2013**	**Fall Semester 2014**	**YOY Comparison**
Brand Posts	1,292	2,033	+57%
Total Engagement	22,521	53,466	+137%
Engagement per Post	17	26	+53%

Website Redesign Project Kicks Off with Research and Discovery Phase

With Longwood's brand strategy work in the final stages, the Website Revitalization Project officially kicked off in early February. After a formal Request for Proposals, our team decided to partner with NewCity Inc, an interactive design agency located in Blacksburg, Va. With a primary focus on higher education, NewCity's client list includes Virginia Tech, University of Virginia and a wide variety of other higher education institutions around the nation. In addition to stellar design work, the agency offers a unique approach to interactive projects with an emphasis on strategic planning and meaningful results. The initial research and discovery phase of the project will run through March and include a review of analytics, a site satisfaction survey, audience interviews and planning workshops—all contributing to a strategy document that will help guide the rest of the project.

Alumni Relations

Associate Vice President for Alumni Relations Retiring

After more than 40 years as Longwood's alumni leader, Nancy Shelton has announced she will retire this spring. Shelton will officially step down April 1 but will remain in an advisory role until the opening of the new Maugans Alumni Center later in the year.

The search for the next head of alumni relations is currently under way. The search committee, which includes members from the Board of Visitors, Alumni Association and University Foundation, as well as faculty and staff, is developing a broad pool of candidates and will begin vetting applicants this spring.

Maugans Alumni Center Update

A three-day celebration for the official opening of the Maugans Alumni Center is being planned for September 10-12. At Convocation, seniors will learn about the role of alumni in the life of the university as well as about the people whose contributions have made the Maugans Alumni Center a reality. On Friday, the Maugans Alumni Center donors will be invited back to campus for VIP tours of the center and to meet the new associate vice president for alumni relations. That evening, these donors will be joined by the other donors at the Lifetime Donor level for a reception and dinner. The dinner will be the first event to be held in the Martinelli Board Room. All alumni will be invited to campus on Saturday for a presentation by Dr. Jim Jordan on the history of the building; a presentation by President Reveley on the vision for the campus over the next five years; tours of the Maugans Alumni Center; a dessert party at Longwood House, where alumni can talk with administrators, faculty, staff and students; and a men's soccer game. Free time with classmates and friends has been allotted so alumni can visit their favorite campus and Farmville locations.

Information Technology Services (ITS)

Associate Vice President of ITS Named

In the summer of 2014 Longwood's associate vice president for ITS and CIO resigned to pursue other employment. Longwood took this opportunity to examine the university's future information technology needs and began planning for how we would be best positioned to meet those needs in the months and years ahead. Rather than appoint a staffer to this position or look outside of Longwood for this role, it was decided that internal interested candidates should apply so that they may be evaluated by a committee of campus leaders.

Based on the interview process with the hiring committee, Mark Kendrick was offered the position and he accepted, effective December 25. Mark has been a loyal and hard-working member of the Longwood ITS staff since 1986. As Director of Communications and Technology Services, Mark is known for his can-do attitude and dedication to customer service.

Educating Faculty and Staff on Phishing

With the latest security breaches reported from Sony, Home Depot and Anthem, ITS, in conjunction with University Marketing and Communications, has launched an awareness campaign regarding phishing. The campaign seeks to educate faculty and staff about what phishing attempts look like and what do if they believe they have succumbed to an attack. In addition to an online presentation, ITS has attended faculty and staff meetings to increase educational awareness to the phishing threat.

Nancy Shelton retiring: Celebrating a lifelong Lancer

February 19th, 2015 Matthew McWilliams

If anyone's blood runs Longwood blue, it is Nancy Shelton '68. Daughter and granddaughter of Longwood graduates, Shelton has made her alma mater her professional home, returning to teach in 1972 and in 1974 being named Longwood's first full-time alumni director—a position she has held ever since.

"For generations of alumni, Nancy has nurtured connections and encouraged thousands to remain engaged in the life of the institution," said Rector Colleen Margiloff '97. "For graduates—many of them multigeneration Longwood families—she has been the welcoming voice and familiar friendly face of their alma mater. Nancy is often the first person people think of when they think of Longwood."

Shelton's 40-plus years as alumni director will come to a close with her retirement this spring, to be followed by a move to Ohio and more time with her husband, Bob; daughters, Jessica and Meredith; and five grandchildren. She made the announcement in a Jan. 9 email to the alumni community.

"One of the most enjoyable aspects has been seeing new high-school graduates as they enter Longwood and watching them becoming young adults preparing for their future life, developing lifelong friendships, beginning their careers and families, and working with them as they re-engage with Longwood," Shelton wrote. Particularly gratifying, she added, is to see many of those graduates re-engage with the university as parents when their own children come to Longwood.

In his own email to campus, President W. Taylor Reveley IV called Shelton's contributions to the Longwood family immeasurable and noted his personal gratitude for the warm welcome she extended to him when he became president in 2013. The president's grandmother, Marie Eason Reveley '40, was a close friend of Shelton's, and his great aunt, Caroline Eason Roberts '42, was an early president of the Alumni Association.

"Longwood has certainly moved through changes during Nancy's 40 years here," President Reveley said. "And her passion, institutional knowledge and commitment to the mission of citizen leadership have played such a fundamental role in what I believe is one of our great institutional accomplishments—maintaining all along our inspiring traditions and identity."

Shelton will officially step down April 1 but will remain in an advisory role until the opening of the new Maugans Alumni Center later in the year. "That building will be a tribute to Nancy's work and the vibrant community of alumni she has been instrumental in creating," the president said. "We will honor her at that time, as well as feting her in the months ahead."

The search for the next head of alumni relations is under way. Members of the search committee are:

Eileen Anderson '83 – Board of Visitors

Scott Bacon – Associate Athletics Director for External Relations

Paul Barrett – Dean of the College of Business and Economics

Jennifer Conkwright – Administrative Assistant to the Vice President for Commonwealth Relations

Kathleen Early '92 – President of the Alumni Association

Jim Jordan – Board of Visitors Distinguished Professor

Bart Mitchell '90 – President of the University Foundation

Tim Pierson – Vice President for Student Affairs

Justin Pope – Chief of Staff, Search Committee Chair

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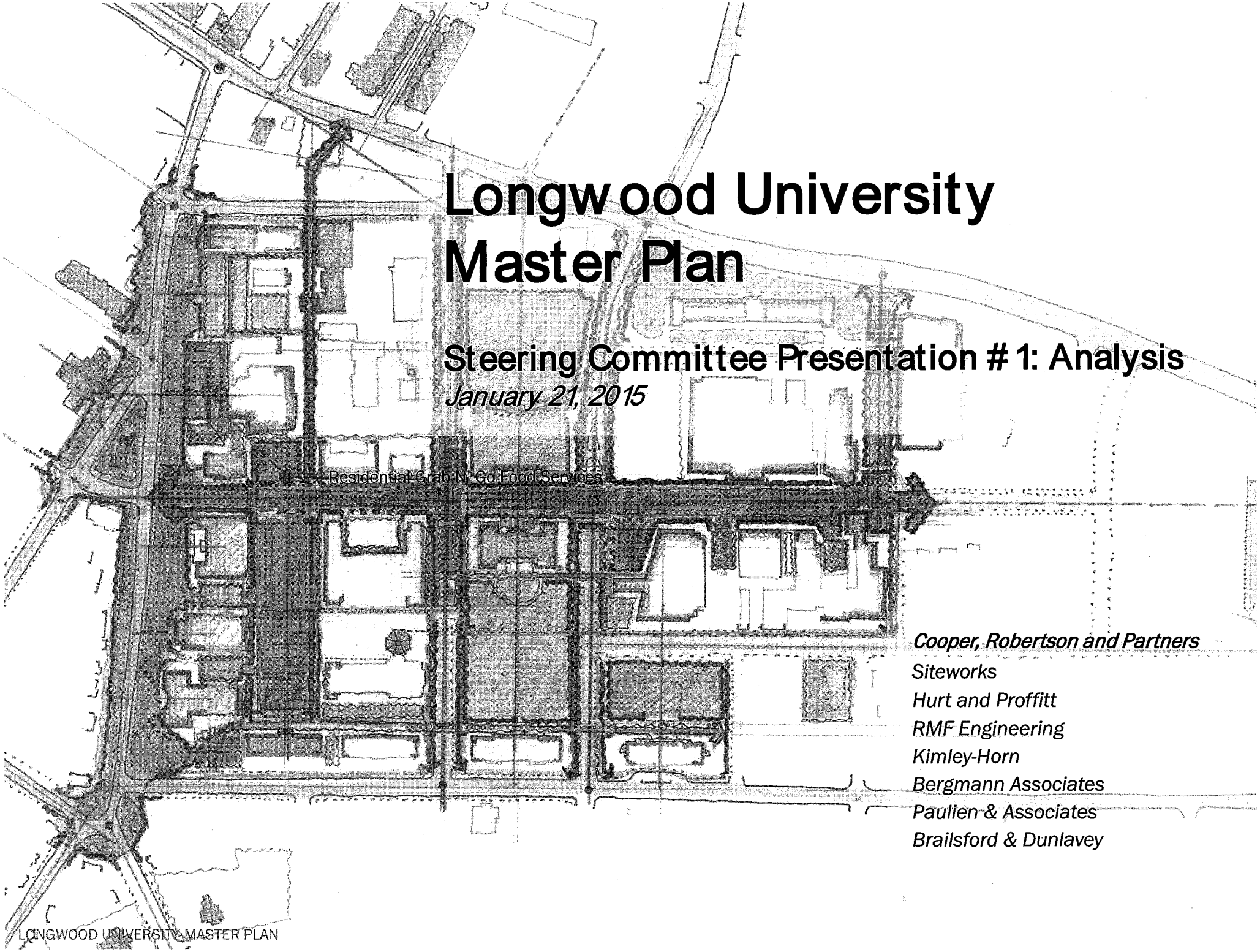
Master Planning Process – January
Staff Presentation by Cooper, Robertson and Partners

John Kirk of Cooper Robertson will be with the Board to talk about progress on the campus master plan. What follows is material from a preliminary presentation to the Master Plan Steering Committee earlier this semester. It summarizes findings from the research stage of the planning process and synthesizes preliminary goals and principles.

Longwood University Master Plan

Steering Committee Presentation # 1: Analysis

January 21, 2015



Cooper, Robertson and Partners

Siteworks

Hurt and Proffitt

RMF Engineering

Kimley-Horn

Bergmann Associates

Paulien & Associates

Brailsford & Dunlavey

STRATEGIC VISION AND DIRECTION

Master Plan should reflect the vision set forth in the **Longwood Strategic Plan:**

- "The **same but better**"
- A strong **residential community**
- A "key node" and an "**engine of prosperity**" for the community
- **Sustainable**
- A **destination**
- An attraction for **alumni**
- Aspiring to **athletic excellence**
- A beautiful place with strong claims to peoples' spirits that will **survive in the long term**

ENHANCING THE HEART OF OUR INSTITUTION

Program Planning and Design Principles

a. **Identify New Building Sites:** that enhance the character and quality of open space on campus, reinforce existing uses and activities, create more informal, unscheduled, Open Spaces and Recreational Amenities.

b. **New Facilities and Open Spaces:** to be flexible, adaptive, and conducive to collaborative learning.

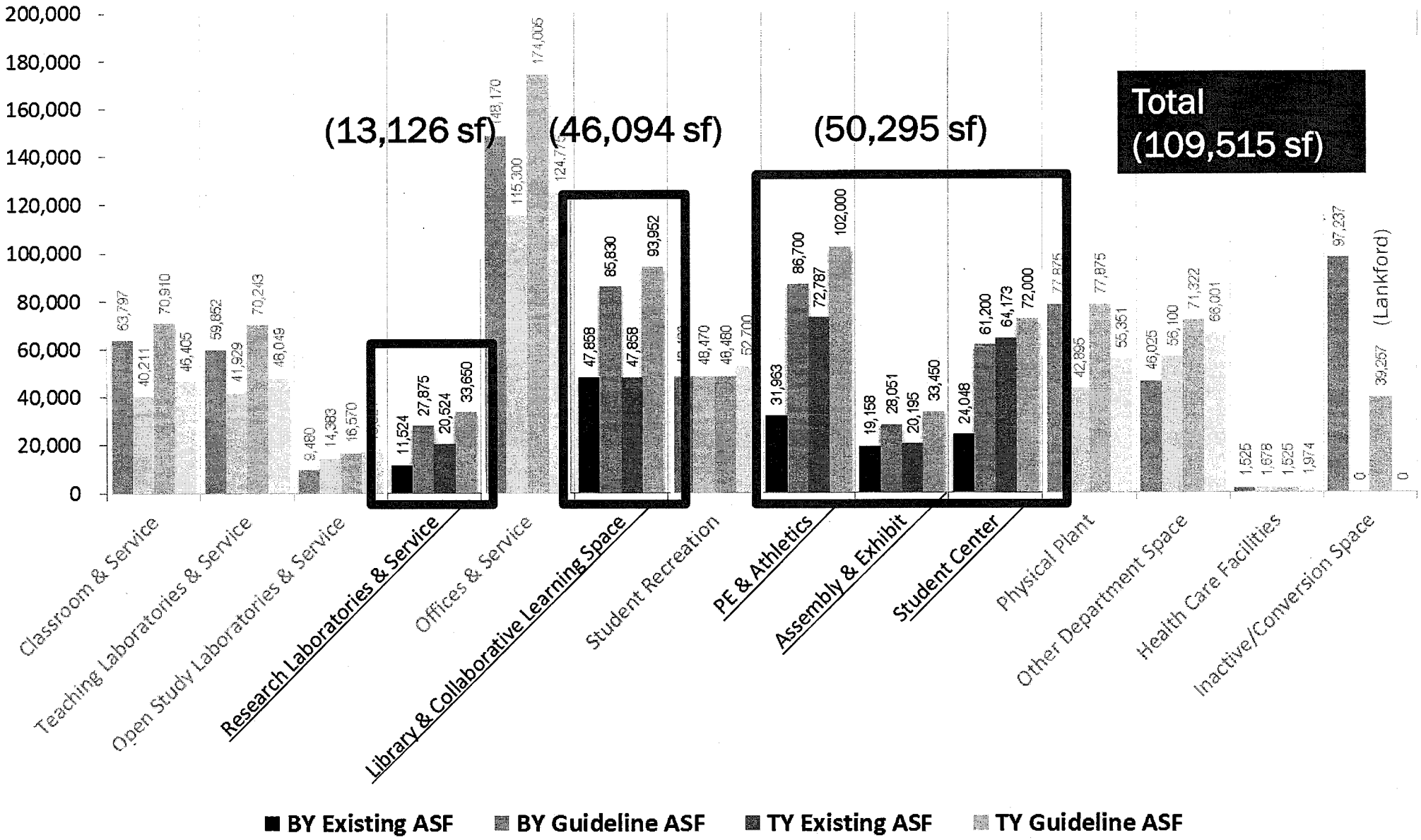
c. **Provide Additional Student Housing** (on the core campus): to further activate existing uses and create a dynamic, mixed-use environment.

d. **Repurpose / Improve Existing Buildings:**

- Willet
- Library
- Lankford
- University Center
- Longwood Housing
- Blackwell Ballroom
- Iler Hall

e. **Enhance and Consolidate the Athletic Facilities**

ACADEMIC PROGRAMMING: SPACE NEEDS ANALYSIS



Physical Planning and Design Principles

a. **Maintain the Scale:** of a modestly scaled University made up of smaller scaled, traditional-styled buildings, generously landscaped grounds and high quality open space.

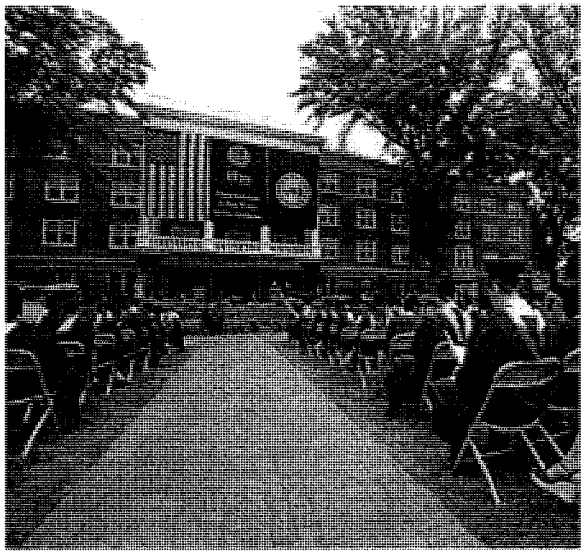
b. **The Historic Campus is the Model:** for the creation of new, memorable open spaces, buildings, streets, right of ways, and view corridors. Redevelopment of the Campus should achieve the quality of:
   a. High Street
   b. Wheeler Hall
   c. North Block Commons
   d. Residence Hall Promenade

c. **Develop the Campus as a Quilt:** of interwoven neighborhoods or precincts that enhance the larger context, while having their own character.

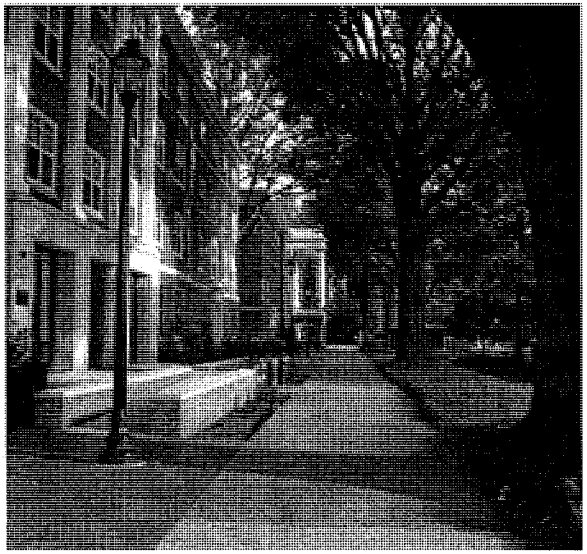
d. **Develop a New Urbanist Campus:** that is about the Public Realm, Connectivity, Walkability, Community and Quality of Life.

MEMORABLE PLACES

High Street Frontage

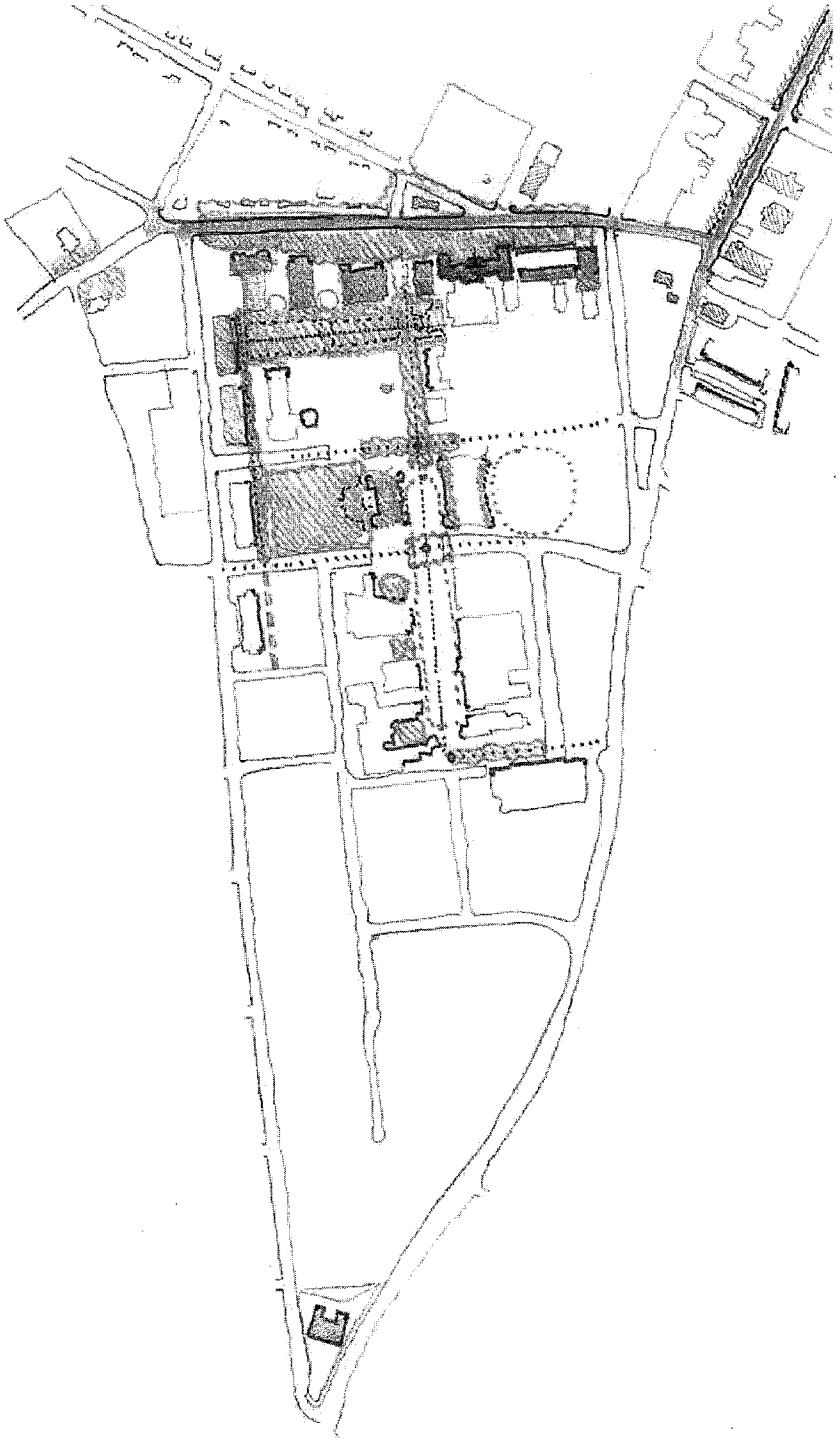


Wheeler Mall



Promenade at Residence Halls

Lankford / Stubbs Mall



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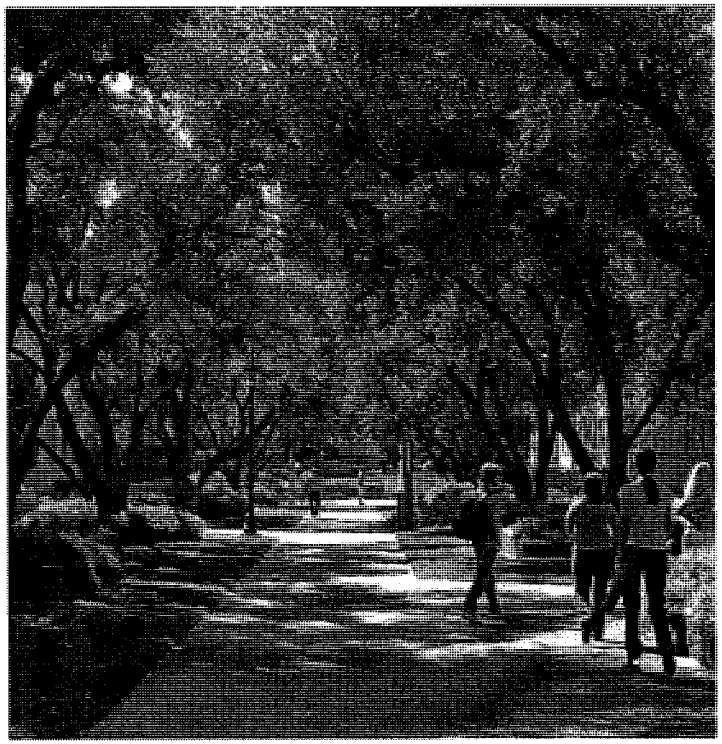
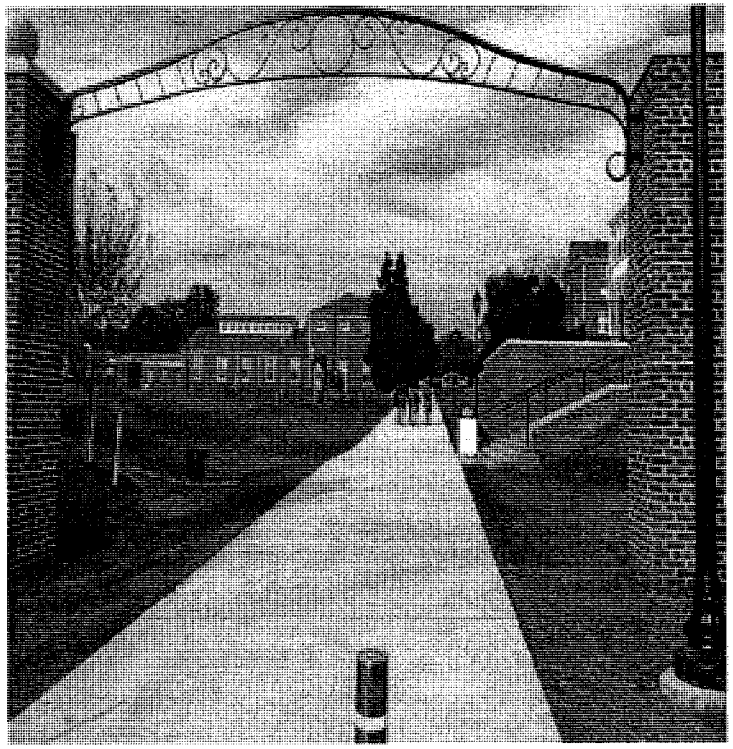
GOALS FOR OPEN SPACES: CREATE OUTDOOR ROOMS

Expand the Longwood garden concept to entire extended campus

- Flexible spaces for teaching and gathering
- Consistent landscape, furnishing and material palette
- Performative and sustainable strategies





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BEYOND LONGWOOD'S BORDERS

Community Planning and Design Principles

1. **Main Campus Edges:**
   - High Street is Longwood's Historic Front Door
   - Reinforce both sides of S. Main Street
   - Develop Seams where the campus and Farmville come together

2. **Griffin Boulevard:** Treat with great sensitivity.

3. **Important Nodes to be Addressed:**
   - Venable, Main & High Streets
   - High, Griffin, Appomattox and Oak Streets
   - Griffin & South Main (at south end of Campus)

4. **Provide New Parking:** for commercial / region-wide uses.

5. **Develop Coordinated Shuttle and Bicycle Networks:** to adequately serve Longwood's and Farmville's various assets.

6. **Envision a Master Plan where the Public Realm is the Highest Priority**

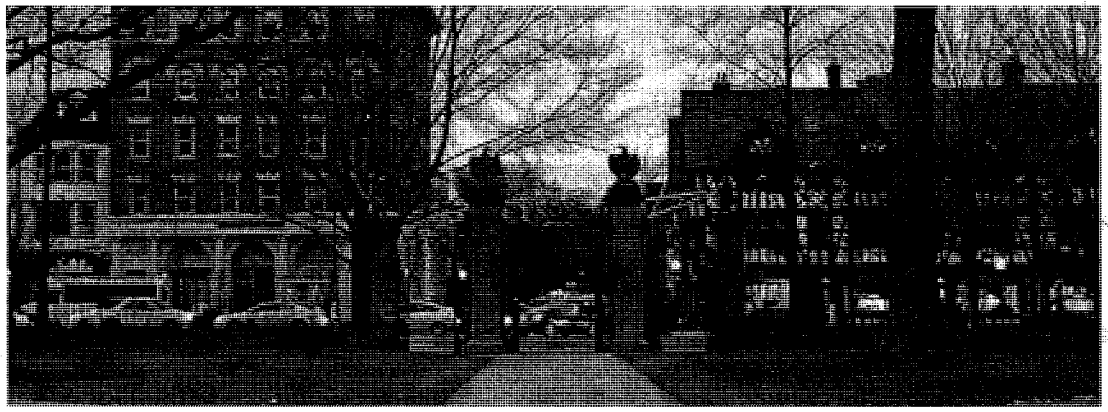
7. **Hull Springs Farms**

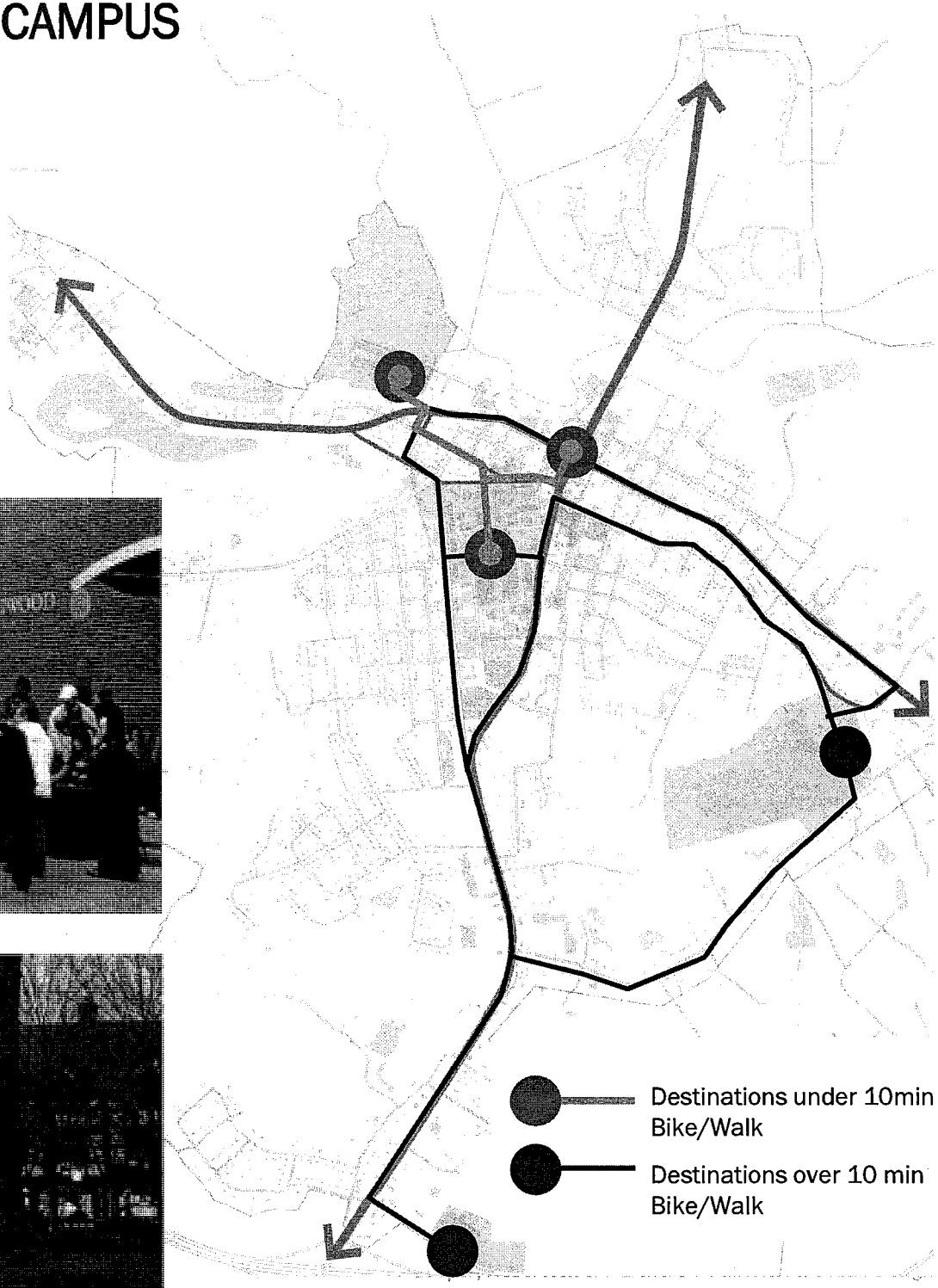
   Develop Conceptual Master Plan for Hull Springs Farms that is exceptionally ecologically and economically sustainable, is in support of the Center for Excellence in Environmental Education Initiatives and addresses Longwood's vision of it as a destination for:
   - Research
   - Teaching / Learning
   - Collaboration
   - Business Retreats / "Think Tanks"
   - Eco, Historic, Cultural and Archeological Tourism

FARMVILLE CONTEXT: EXTENDED CAMPUS

Longwood's Campus should be:

- Accessible to Farmville
- An Amenity for Farmville
- Part of the fabric of Farmville
- Farmville should be part of the fabric of Longwood.

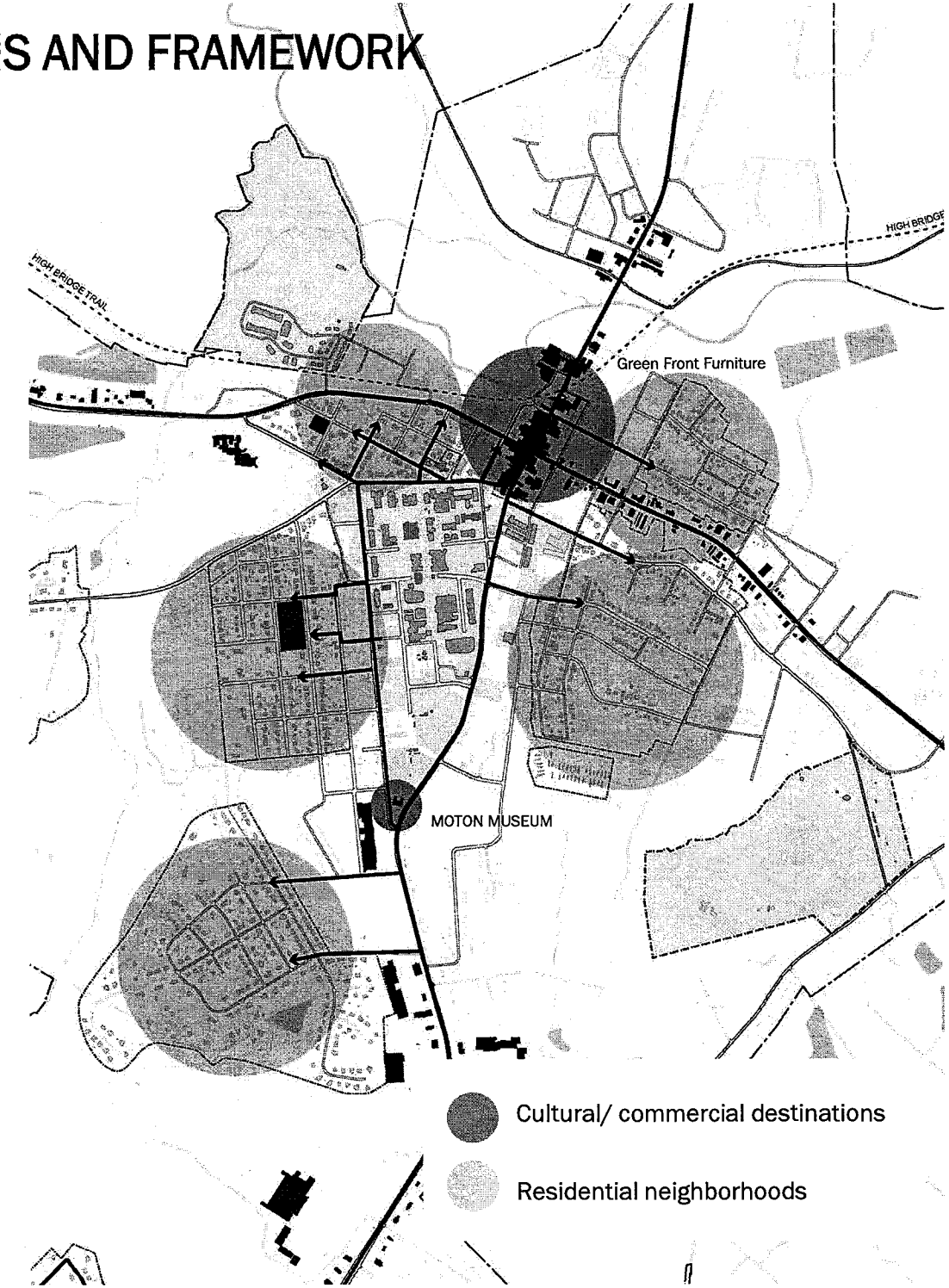




FARMVILLE CONTEXT: CONNECTIONS AND FRAMEWORK

Physical and Programmatic Elements:

- Catalysts: Refurbishment of Downtown
- Development / Smart Growth of Farmville
    - Connectivity
    - Walkability
    - Community
    - Dynamic
    - Mixed Use
    - Quality of Life



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UNITED STATES DEPARTMENT OF EDUCATION

OFFICE FOR CIVIL RIGHTS

THE ASSISTANT SECRETARY

Questions and Answers on Title IX and Sexual Violence[1]

Title IX of the Education Amendments of 1972 ("Title IX")[2] is a federal civil rights law that prohibits discrimination on the basis of sex in federally funded education programs and activities. All public and private elementary and secondary schools, school districts, colleges, and universities receiving any federal financial assistance (hereinafter "schools", "recipients", or "recipient institutions") must comply with Title IX.[3]

On April 4, 2011, the Office for Civil Rights (OCR) in the U.S. Department of Education issued a Dear Colleague Letter on student-on-student sexual harassment and sexual violence ("DCL").[4] The DCL explains a school's responsibility to respond promptly and effectively to sexual violence against students in accordance with the requirements of Title IX.[5] Specifically, the DCL:

- Provides guidance on the unique concerns that arise in sexual violence cases, such as a school's independent responsibility under Title IX to investigate (apart from any separate criminal investigation by local police) and address sexual violence.

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[1] The Department has determined that this document is a "significant guidance document" under the Office of Management and Budget's Final Bulletin for Agency Good Guidance Practices, 72 Fed. Reg. 3432 (Jan. 25, 2007), *available at* www.whitehouse.gov/sites/default/files/omb/fedreg/2007/012507_good_guidance.pdf. The Office for Civil Rights (OCR) issues this and other policy guidance to provide recipients with information to assist them in meeting their obligations, and to provide members of the public with information about their rights, under the civil rights laws and implementing regulations that we enforce. OCR's legal authority is based on those laws and regulations. This guidance does not add requirements to applicable law, but provides information and examples to inform recipients about how OCR evaluates whether covered entities are complying with their legal obligations. If you are interested in commenting on this guidance, please send an e-mail with your comments to OCR@ed.gov, or write to the following address: Office for Civil Rights, U.S. Department of Education, 400 Maryland Avenue, SW, Washington, D.C. 20202.

[2] 20 U.S.C. § 1681 *et seq*.

[3] Throughout this document the term "schools" refers to recipients of federal financial assistance that operate educational programs or activities. For Title IX purposes, at the elementary and secondary school level, the recipient generally is the school district; and at the postsecondary level, the recipient is the individual institution of higher education. An educational institution that is controlled by a religious organization is exempt from Title IX to the extent that the law's requirements conflict with the organization's religious tenets. 20 U.S.C. § 1681(a)(3); 34 C.F.R. § 106.12(a). For application of this provision to a specific institution, please contact the appropriate OCR regional office.

[4] Available at http://www.ed.gov/ocr/letters/colleague-201104.html.

[5] Although this document and the DCL focus on sexual violence, the legal principles generally also apply to other forms of sexual harassment.

- Provides guidance and examples about key Title IX requirements and how they relate to sexual violence, such as the requirements to publish a policy against sex discrimination, designate a Title IX coordinator, and adopt and publish grievance procedures.

- Discusses proactive efforts schools can take to prevent sexual violence.

- Discusses the interplay between Title IX, the Family Educational Rights and Privacy Act ("FERPA"),[6] and the Jeanne Clery Disclosure of Campus Security and Campus Crime Statistics Act ("Clery Act")[7] as it relates to a complainant's right to know the outcome of his or her complaint, including relevant sanctions imposed on the perpetrator.

- Provides examples of remedies and enforcement strategies that schools and OCR may use to respond to sexual violence.

The DCL supplements OCR's *Revised Sexual Harassment Guidance: Harassment of Students by School Employees, Other Students, or Third Parties*, issued in 2001 (*2001 Guidance*).[8] The *2001 Guidance* discusses in detail the Title IX requirements related to sexual harassment of students by school employees, other students, or third parties. The DCL and the *2001 Guidance* remain in full force and we recommend reading these Questions and Answers in conjunction with these documents.

In responding to requests for technical assistance, OCR has determined that elementary and secondary schools and postsecondary institutions would benefit from additional guidance concerning their obligations under Title IX to address sexual violence as a form of sexual harassment. The following questions and answers further clarify the legal requirements and guidance articulated in the DCL and the *2001 Guidance* and include examples of proactive efforts schools can take to prevent sexual violence and remedies schools may use to end such conduct, prevent its recurrence, and address its effects. In order to gain a complete understanding of these legal requirements and recommendations, this document should be read in full.

Authorized by

/s/

Catherine E. Lhamon
Assistant Secretary for Civil Rights

April 29, 2014

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[6] 20 U.S.C. §1232g; 34 C.F.R. Part 99.
[7] 20 U.S.C. §1092(f).
[8] Available at http://www.ed.gov/ocr/docs/shguide.html.

Notice of Language Assistance
Questions and Answers on Title IX and Sexual Violence

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A. A School's Obligation to Respond to Sexual Violence

A-1. What is sexual violence?

Answer: Sexual violence, as that term is used in this document and prior OCR guidance, refers to physical sexual acts perpetrated against a person's will or where a person is incapable of giving consent (*e.g.*, due to the student's age or use of drugs or alcohol, or because an intellectual or other disability prevents the student from having the capacity to give consent). A number of different acts fall into the category of sexual violence, including rape, sexual assault, sexual battery, sexual abuse, and sexual coercion. Sexual violence can be carried out by school employees, other students, or third parties. All such acts of sexual violence are forms of sex discrimination prohibited by Title IX.

A-2. How does Title IX apply to student-on-student sexual violence?

Answer: Under Title IX, federally funded schools must ensure that students of all ages are not denied or limited in their ability to participate in or benefit from the school's educational programs or activities on the basis of sex. A school violates a student's rights under Title IX regarding student-on-student sexual violence when the following conditions are met: (1) the alleged conduct is sufficiently serious to limit or deny a student's ability to participate in or benefit from the school's educational program, *i.e.* creates a hostile environment; and (2) the school, upon notice, fails to take prompt and effective steps reasonably calculated to end the sexual violence, eliminate the hostile environment, prevent its recurrence, and, as appropriate, remedy its effects.[9]

A-3. How does OCR determine if a hostile environment has been created?

Answer: As discussed more fully in OCR's *2001 Guidance*, OCR considers a variety of related factors to determine if a hostile environment has been created; and also considers the conduct in question from both a subjective and an objective perspective. Specifically, OCR's standards require that the conduct be evaluated from the perspective of a reasonable person in the alleged victim's position, considering all the circumstances. The more severe the conduct, the less need there is to show a repetitive series of incidents to prove a hostile environment, particularly if the conduct is physical. Indeed, a single or isolated incident of sexual violence may create a hostile environment.

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[9] This is the standard for administrative enforcement of Title IX and in court cases where plaintiffs are seeking injunctive relief. *See 2001 Guidance* at ii-v, 12-13. The standard in private lawsuits for monetary damages is actual knowledge and deliberate indifference. *See Davis v. Monroe Cnty Bd. of Educ.*, 526 U.S. 629, 643 (1999).

A-4. When does OCR consider a school to have notice of student-on-student sexual violence?

Answer: OCR deems a school to have notice of student-on-student sexual violence if a responsible employee knew, or in the exercise of reasonable care should have known, about the sexual violence. See question D-2 regarding who is a responsible employee.

A school can receive notice of sexual violence in many different ways. Some examples of notice include: a student may have filed a grievance with or otherwise informed the school's Title IX coordinator; a student, parent, friend, or other individual may have reported an incident to a teacher, principal, campus law enforcement, staff in the office of student affairs, or other responsible employee; or a teacher or dean may have witnessed the sexual violence.

The school may also receive notice about sexual violence in an indirect manner, from sources such as a member of the local community, social networking sites, or the media. In some situations, if the school knows of incidents of sexual violence, the exercise of reasonable care should trigger an investigation that would lead to the discovery of additional incidents. For example, if school officials receive a credible report that a student has perpetrated several acts of sexual violence against different students, that pattern of conduct should trigger an inquiry as to whether other students have been subjected to sexual violence by that student. In other cases, the pervasiveness of the sexual violence may be widespread, openly practiced, or well-known among students or employees. In those cases, OCR may conclude that the school should have known of the hostile environment. In other words, if the school would have found out about the sexual violence had it made a proper inquiry, knowledge of the sexual violence will be imputed to the school even if the school failed to make an inquiry. A school's failure to take prompt and effective corrective action in such cases (as described in questions G-1 to G-3 and H-1 to H-3) would violate Title IX even if the student did not use the school's grievance procedures or otherwise inform the school of the sexual violence.

A-5. What are a school's basic responsibilities to address student-on-student sexual violence?

Answer: When a school knows or reasonably should know of possible sexual violence, it must take immediate and appropriate steps to investigate or otherwise determine what occurred (subject to the confidentiality provisions discussed in Section E). If an investigation reveals that sexual violence created a hostile environment, the school must then take prompt and effective steps reasonably calculated to end the sexual violence, eliminate the hostile environment, prevent its recurrence, and, as appropriate, remedy its

effects. But a school should not wait to take steps to protect its students until students have already been deprived of educational opportunities.

Title IX requires a school to protect the complainant and ensure his or her safety as necessary, including taking interim steps before the final outcome of any investigation.[10] The school should take these steps promptly once it has notice of a sexual violence allegation and should provide the complainant with periodic updates on the status of the investigation. If the school determines that the sexual violence occurred, the school must continue to take these steps to protect the complainant and ensure his or her safety, as necessary. The school should also ensure that the complainant is aware of any available resources, such as victim advocacy, housing assistance, academic support, counseling, disability services, health and mental health services, and legal assistance, and the right to report a crime to campus or local law enforcement. For additional information on interim measures, see questions G-1 to G-3.

If a school delays responding to allegations of sexual violence or responds inappropriately, the school's own inaction may subject the student to a hostile environment. If it does, the school will also be required to remedy the effects of the sexual violence that could reasonably have been prevented had the school responded promptly and appropriately. For example, if a school's ignoring of a student's complaints of sexual assault by a fellow student results in the complaining student having to remain in classes with the other student for several weeks and the complaining student's grades suffer because he or she was unable to concentrate in these classes, the school may need to permit the complaining student to retake the classes without an academic or financial penalty (in addition to any other remedies) in order to address the effects of the sexual violence.

A-6. Does Title IX cover employee-on-student sexual violence, such as sexual abuse of children?

Answer: Yes. Although this document and the DCL focus on student-on-student sexual violence, Title IX also protects students from other forms of sexual harassment (including sexual violence and sexual abuse), such as sexual harassment carried out by school employees. Sexual harassment by school employees can include unwelcome sexual advances; requests for sexual favors; and other verbal, nonverbal, or physical conduct of a sexual nature, including but not limited to sexual activity. Title IX's prohibition against

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[10] Throughout this document, unless otherwise noted, the term "complainant" refers to the student who allegedly experienced the sexual violence.

sexual harassment generally does not extend to legitimate nonsexual touching or other nonsexual conduct. But in some circumstances, nonsexual conduct may take on sexual connotations and rise to the level of sexual harassment. For example, a teacher repeatedly hugging and putting his or her arms around students under inappropriate circumstances could create a hostile environment. Early signs of inappropriate behavior with a child can be the key to identifying and preventing sexual abuse by school personnel.

A school's Title IX obligations regarding sexual harassment by employees can, in some instances, be greater than those described in this document and the DCL. Recipients should refer to OCR's *2001 Guidance* for further information about Title IX obligations regarding harassment of students by school employees. In addition, many state and local laws have mandatory reporting requirements for schools working with minors. Recipients should be careful to satisfy their state and local legal obligations in addition to their Title IX obligations, including training to ensure that school employees are aware of their obligations under such state and local laws and the consequences for failing to satisfy those obligations.

With respect to sexual activity in particular, OCR will always view as unwelcome and nonconsensual sexual activity between an adult school employee and an elementary school student or any student below the legal age of consent in his or her state. In cases involving a student who meets the legal age of consent in his or her state, there will still be a strong presumption that sexual activity between an adult school employee and a student is unwelcome and nonconsensual. When a school is on notice that a school employee has sexually harassed a student, it is responsible for taking prompt and effective steps reasonably calculated to end the sexual harassment, eliminate the hostile environment, prevent its recurrence, and remedy its effects. Indeed, even if a school was not on notice, the school is nonetheless responsible for remedying any effects of the sexual harassment on the student, as well as for ending the sexual harassment and preventing its recurrence, when the employee engaged in the sexual activity in the context of the employee's provision of aid, benefits, or services to students (*e.g.*, teaching, counseling, supervising, advising, or transporting students).

A school should take steps to protect its students from sexual abuse by its employees. It is therefore imperative for a school to develop policies prohibiting inappropriate conduct by school personnel and procedures for identifying and responding to such conduct. For example, this could include implementing codes of conduct, which might address what is commonly known as grooming – a desensitization strategy common in adult educator sexual misconduct. Such policies and procedures can ensure that students, parents, and

school personnel have clear guidelines on what are appropriate and inappropriate interactions between adults and students in a school setting or in school-sponsored activities. Additionally, a school should provide training for administrators, teachers, staff, parents, and age-appropriate classroom information for students to ensure that everyone understands what types of conduct are prohibited and knows how to respond when problems arise.[11]

B. Students Protected by Title IX

B-1. Does Title IX protect all students from sexual violence?

Answer: Yes. Title IX protects all students at recipient institutions from sex discrimination, including sexual violence. Any student can experience sexual violence: from elementary to professional school students; male and female students; straight, gay, lesbian, bisexual and transgender students; part-time and full-time students; students with and without disabilities; and students of different races and national origins.

B-2. How should a school handle sexual violence complaints in which the complainant and the alleged perpetrator are members of the same sex?

Answer: A school's obligation to respond appropriately to sexual violence complaints is the same irrespective of the sex or sexes of the parties involved. Title IX protects all students from sexual violence, regardless of the sex of the alleged perpetrator or complainant, including when they are members of the same sex. A school must investigate and resolve allegations of sexual violence involving parties of the same sex using the same procedures and standards that it uses in all complaints involving sexual violence.

Title IX's sex discrimination prohibition extends to claims of discrimination based on gender identity or failure to conform to stereotypical notions of masculinity or femininity and OCR accepts such complaints for investigation. Similarly, the actual or perceived sexual orientation or gender identity of the parties does not change a school's obligations. Indeed, lesbian, gay, bisexual, and transgender (LGBT) youth report high rates of sexual harassment and sexual violence. A school should investigate and resolve allegations of sexual violence regarding LGBT students using the same procedures and standards that it

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[11] For additional informational on training please see the Department of Education's Resource and Emergency Management for Schools Technical Assistance Center – Adult Sexual Misconduct in Schools: Prevention and Management Training, available at http://rems.ed.gov/Docs/ASM_Marketing_Flyer.pdf.

uses in all complaints involving sexual violence. The fact that incidents of sexual violence may be accompanied by anti-gay comments or be partly based on a student's actual or perceived sexual orientation does not relieve a school of its obligation under Title IX to investigate and remedy those instances of sexual violence.

If a school's policies related to sexual violence include examples of particular types of conduct that violate the school's prohibition on sexual violence, the school should consider including examples of same-sex conduct. In addition, a school should ensure that staff are capable of providing culturally competent counseling to all complainants. Thus, a school should ensure that its counselors and other staff who are responsible for receiving and responding to complaints of sexual violence, including investigators and hearing board members, receive appropriate training about working with LGBT and gender-nonconforming students and same-sex sexual violence. See questions J-1 to J-4 for additional information regarding training.

Gay-straight alliances and similar student-initiated groups can also play an important role in creating safer school environments for LGBT students. On June 14, 2011, the Department issued guidance about the rights of student-initiated groups in public secondary schools under the Equal Access Act. That guidance is available at http://www2.ed.gov/policy/elsec/guid/secletter/110607.html.

B-3. What issues may arise with respect to students with disabilities who experience sexual violence?

Answer: When students with disabilities experience sexual violence, federal civil rights laws other than Title IX may also be relevant to a school's responsibility to investigate and address such incidents.[12] Certain students require additional assistance and support. For example, students with intellectual disabilities may need additional help in learning about sexual violence, including a school's sexual violence education and prevention programs, what constitutes sexual violence and how students can report incidents of sexual

[12] OCR enforces two civil rights laws that prohibit disability discrimination. Section 504 of the Rehabilitation Act of 1973 (Section 504) prohibits disability discrimination by public or private entities that receive federal financial assistance, and Title II of the American with Disabilities Act of 1990 (Title II) prohibits disability discrimination by all state and local public entities, regardless of whether they receive federal funding. *See* 29 U.S.C. § 794 and 34 C.F.R. part 104; 42 U.S.C. § 12131 *et seq.* and 28 C.F.R. part 35. OCR and the U.S. Department of Justice (DOJ) share the responsibility of enforcing Title II in the educational context. The Department of Education's Office of Special Education Programs in the Office of Special Education and Rehabilitative Services administers Part B of the Individuals with Disabilities Education Act (IDEA). 20 U.S.C. 1400 *et seq.* and 34 C.F.R. part 300. IDEA provides financial assistance to states, and through them to local educational agencies, to assist in providing special education and related services to eligible children with disabilities ages three through twenty-one, inclusive.

violence. In addition, students with disabilities who experience sexual violence may require additional services and supports, including psychological services and counseling services. Postsecondary students who need these additional services and supports can seek assistance from the institution's disability resource office.

A student who has not been previously determined to have a disability may, as a result of experiencing sexual violence, develop a mental health-related disability that could cause the student to need special education and related services. At the elementary and secondary education level, this may trigger a school's child find obligations under IDEA and the evaluation and placement requirements under Section 504, which together require a school to evaluate a student suspected of having a disability to determine if he or she has a disability that requires special education or related aids and services.[13]

A school must also ensure that any school reporting forms, information, or training about sexual violence be provided in a manner that is accessible to students and employees with disabilities, for example, by providing electronically-accessible versions of paper forms to individuals with print disabilities, or by providing a sign language interpreter to a deaf individual attending a training. See question J-4 for more detailed information on student training.

B-4. What issues arise with respect to international students and undocumented students who experience sexual violence?

Answer: Title IX protects all students at recipient institutions in the United States regardless of national origin, immigration status, or citizenship status.[14] A school should ensure that all students regardless of their immigration status, including undocumented students and international students, are aware of their rights under Title IX. A school must also ensure that any school reporting forms, information, or training about sexual violence be provided in a manner accessible to students who are English language learners. OCR recommends that a school coordinate with its international office and its undocumented student program coordinator, if applicable, to help communicate information about Title IX in languages that are accessible to these groups of students. OCR also encourages schools to provide foreign national complainants with information about the U nonimmigrant status and the T nonimmigrant status. The U nonimmigrant status is set

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[13] *See* 34 C.F.R. §§ 300.8; 300.111; 300.201; 300.300-300.311 (IDEA); 34 C.F.R. §§ 104.3(j) and 104.35 (Section 504). Schools must comply with applicable consent requirements with respect to evaluations. *See* 34 C.F.R. § 300.300.
[14] OCR enforces Title VI of the Civil Rights Act of 1964, which prohibits discrimination by recipients of federal financial assistance on the basis of race, color, or national origin. 42 U.S.C. § 2000d.

aside for victims of certain crimes who have suffered substantial mental or physical abuse as a result of the crime and are helpful to law enforcement agency in the investigation or prosecution of the qualifying criminal activity.[15] The T nonimmigrant status is available for victims of severe forms of human trafficking who generally comply with a law enforcement agency in the investigation or prosecution of the human trafficking and who would suffer extreme hardship involving unusual and severe harm if they were removed from the United States.[16]

A school should be mindful that unique issues may arise when a foreign student on a student visa experiences sexual violence. For example, certain student visas require the student to maintain a full-time course load (generally at least 12 academic credit hours per term), but a student may need to take a reduced course load while recovering from the immediate effects of the sexual violence. OCR recommends that a school take steps to ensure that international students on student visas understand that they must typically seek prior approval of the designated school official (DSO) for student visas to drop below a full-time course load. A school may also want to encourage its employees involved in handling sexual violence complaints and counseling students who have experienced sexual violence to approach the DSO on the student's behalf if the student wishes to drop below a full-time course load. OCR recommends that a school take steps to ensure that its employees who work with international students, including the school's DSO, are trained on the school's sexual violence policies and that employees involved in handling sexual violence complaints and counseling students who have experienced sexual violence are aware of the special issues that international students may encounter. See questions J-1 to J-4 for additional information regarding training.

A school should also be aware that threatening students with deportation or invoking a student's immigration status in an attempt to intimidate or deter a student from filing a Title IX complaint would violate Title IX's protections against retaliation. For more information on retaliation see question K-1.

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[15] For more information on the U nonimmigrant status, see http://www.uscis.gov/humanitarian/victims-human-trafficking-other-crimes/victims-criminal-activity-u-nonimmigrant-status/questions-answers-victims-criminal-activity-u-nonimmigrant-status.

[16] For more information on the T nonimmigrant status, see http://www.uscis.gov/humanitarian/victims-human-trafficking-other-crimes/victims-human-trafficking-t-nonimmigrant-status.

B-5. How should a school respond to sexual violence when the alleged perpetrator is not affiliated with the school?

Answer: The appropriate response will differ depending on the level of control the school has over the alleged perpetrator. For example, if an athlete or band member from a visiting school sexually assaults a student at the home school, the home school may not be able to discipline or take other direct action against the visiting athlete or band member. However (and subject to the confidentiality provisions discussed in Section E), it should conduct an inquiry into what occurred and should report the incident to the visiting school and encourage the visiting school to take appropriate action to prevent further sexual violence. The home school should also notify the student of any right to file a complaint with the alleged perpetrator's school or local law enforcement. The home school may also decide not to invite the visiting school back to its campus.

Even though a school's ability to take direct action against a particular perpetrator may be limited, the school must still take steps to provide appropriate remedies for the complainant and, where appropriate, the broader school population. This may include providing support services for the complainant, and issuing new policy statements making it clear that the school does not tolerate sexual violence and will respond to any reports about such incidents. For additional information on interim measures see questions G-1 to G-3.

C. Title IX Procedural Requirements

Overview

C-1. What procedures must a school have in place to prevent sexual violence and resolve complaints?

Answer: The Title IX regulations outline three key procedural requirements. Each school must:

(1) disseminate a notice of nondiscrimination (see question C-2);[17]

(2) designate at least one employee to coordinate its efforts to comply with and carry out its responsibilities under Title IX (see questions C-3 to C-4);[18] and

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[17] 34 C.F.R. § 106.9.
[18] *Id.* § 106.8(a).

(3) adopt and publish grievance procedures providing for the prompt and equitable resolution of student and employee sex discrimination complaints (see questions C-5 to C-6).[19]

These requirements apply to all forms of sex discrimination and are particularly important for preventing and effectively responding to sexual violence.

Procedural requirements under other federal laws may also apply to complaints of sexual violence, including the requirements of the Clery Act.[20] For additional information about the procedural requirements in the Clery Act, please see http://www2.ed.gov/admins/lead/safety/campus.html.

Notice of Nondiscrimination

C-2. What information must be included in a school's notice of nondiscrimination?

Answer: The notice of nondiscrimination must state that the school does not discriminate on the basis of sex in its education programs and activities, and that it is required by Title IX not to discriminate in such a manner. The notice must state that questions regarding Title IX may be referred to the school's Title IX coordinator or to OCR. The school must notify all of its students and employees of the name or title, office address, telephone number, and email address of the school's designated Title IX coordinator.[21]

Title IX Coordinator

C-3. What are a Title IX coordinator's responsibilities?

Answer: A Title IX coordinator's core responsibilities include overseeing the school's response to Title IX reports and complaints and identifying and addressing any patterns or systemic problems revealed by such reports and complaints. This means that the Title IX coordinator must have knowledge of the requirements of Title IX, of the school's own policies and procedures on sex discrimination, and of all complaints raising Title IX issues throughout the school. To accomplish this, subject to the exemption for school counseling employees discussed in question E-3, the Title IX coordinator must be informed of all

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[19] *Id.* § 106.8(b).

[20] All postsecondary institutions participating in the Higher Education Act's Title IV student financial assistance programs must comply with the Clery Act.

[21] For more information on notices of nondiscrimination, please see OCR's Notice of Nondiscrimination (August 2010), available at http://www.ed.gov/ocr/docs/nondisc.pdf.

reports and complaints raising Title IX issues, even if the report or complaint was initially filed with another individual or office or if the investigation will be conducted by another individual or office. The school should ensure that the Title IX coordinator is given the training, authority, and visibility necessary to fulfill these responsibilities.

Because the Title IX coordinator must have knowledge of all Title IX reports and complaints at the school, this individual (when properly trained) is generally in the best position to evaluate a student's request for confidentiality in the context of the school's responsibility to provide a safe and nondiscriminatory environment for all students. A school may determine, however, that another individual should perform this role. For additional information on confidentiality requests, see questions E-1 to E-4. If a school relies in part on its disciplinary procedures to meet its Title IX obligations, the Title IX coordinator should review the disciplinary procedures to ensure that the procedures comply with the prompt and equitable requirements of Title IX as discussed in question C-5.

In addition to these core responsibilities, a school may decide to give its Title IX coordinator additional responsibilities, such as: providing training to students, faculty, and staff on Title IX issues; conducting Title IX investigations, including investigating facts relevant to a complaint, and determining appropriate sanctions against the perpetrator and remedies for the complainant; determining appropriate interim measures for a complainant upon learning of a report or complaint of sexual violence; and ensuring that appropriate policies and procedures are in place for working with local law enforcement and coordinating services with local victim advocacy organizations and service providers, including rape crisis centers. A school must ensure that its Title IX coordinator is appropriately trained in all areas over which he or she has responsibility. The Title IX coordinator or designee should also be available to meet with students as needed.

If a school designates more than one Title IX coordinator, the school's notice of nondiscrimination and Title IX grievance procedures should describe each coordinator's responsibilities, and one coordinator should be designated as having ultimate oversight responsibility.

C-4. Are there any employees who should not serve as the Title IX coordinator?

Answer: Title IX does not categorically preclude particular employees from serving as Title IX coordinators. However, Title IX coordinators should not have other job responsibilities that may create a conflict of interest. Because some complaints may raise issues as to whether or how well the school has met its Title IX obligations, designating

the same employee to serve both as the Title IX coordinator and the general counsel (which could include representing the school in legal claims alleging Title IX violations) poses a serious risk of a conflict of interest. Other employees whose job responsibilities may conflict with a Title IX coordinator's responsibilities include Directors of Athletics, Deans of Students, and any employee who serves on the judicial/hearing board or to whom an appeal might be made. Designating a full-time Title IX coordinator will minimize the risk of a conflict of interest.

Grievance Procedures

C-5. Under Title IX, what elements should be included in a school's procedures for responding to complaints of sexual violence?

Answer: Title IX requires that a school adopt and publish grievance procedures providing for prompt and equitable resolution of student and employee complaints of sex discrimination, including sexual violence. In evaluating whether a school's grievance procedures satisfy this requirement, OCR will review all aspects of a school's policies and practices, including the following elements that are critical to achieve compliance with Title IX:

(1) notice to students, parents of elementary and secondary students, and employees of the grievance procedures, including where complaints may be filed;

(2) application of the grievance procedures to complaints filed by students or on their behalf alleging sexual violence carried out by employees, other students, or third parties;

(3) provisions for adequate, reliable, and impartial investigation of complaints, including the opportunity for both the complainant and alleged perpetrator to present witnesses and evidence;

(4) designated and reasonably prompt time frames for the major stages of the complaint process (see question F-8);

(5) written notice to the complainant and alleged perpetrator of the outcome of the complaint (see question H-3); and

(6) assurance that the school will take steps to prevent recurrence of any sexual violence and remedy discriminatory effects on the complainant and others, if appropriate.

To ensure that students and employees have a clear understanding of what constitutes sexual violence, the potential consequences for such conduct, and how the school processes complaints, a school's Title IX grievance procedures should also explicitly include the following in writing, some of which themselves are mandatory obligations under Title IX:

(1) a statement of the school's jurisdiction over Title IX complaints;

(2) adequate definitions of sexual harassment (which includes sexual violence) and an explanation as to when such conduct creates a hostile environment;

(3) reporting policies and protocols, including provisions for confidential reporting;

(4) identification of the employee or employees responsible for evaluating requests for confidentiality;

(5) notice that Title IX prohibits retaliation;

(6) notice of a student's right to file a criminal complaint and a Title IX complaint simultaneously;

(7) notice of available interim measures that may be taken to protect the student in the educational setting;

(8) the evidentiary standard that must be used (preponderance of the evidence) (*i.e.*, more likely than not that sexual violence occurred) in resolving a complaint;

(9) notice of potential remedies for students;

(10) notice of potential sanctions against perpetrators; and

(11) sources of counseling, advocacy, and support.

For more information on interim measures, see questions G-1 to G-3.

The rights established under Title IX must be interpreted consistently with any federally guaranteed due process rights. Procedures that ensure the Title IX rights of the complainant, while at the same time according any federally guaranteed due process to both parties involved, will lead to sound and supportable decisions. Of course, a school should ensure that steps to accord any due process rights do not restrict or unnecessarily delay the protections provided by Title IX to the complainant.

A school's procedures and practices will vary in detail, specificity, and components, reflecting differences in the age of its students, school size and administrative structure, state or local legal requirements (*e.g.*, mandatory reporting requirements for schools working with minors), and what it has learned from past experiences.

C-6. Is a school required to use separate grievance procedures for sexual violence complaints?

Answer: No. Under Title IX, a school may use student disciplinary procedures, general Title IX grievance procedures, sexual harassment procedures, or separate procedures to resolve sexual violence complaints. However, any procedures used for sexual violence complaints, including disciplinary procedures, must meet the Title IX requirement of affording a complainant a prompt and equitable resolution (as discussed in question C-5), including applying the preponderance of the evidence standard of review. As discussed in question C-3, the Title IX coordinator should review any process used to resolve complaints of sexual violence to ensure it complies with requirements for prompt and equitable resolution of these complaints. When using disciplinary procedures, which are often focused on the alleged perpetrator and can take considerable time, a school should be mindful of its obligation to provide interim measures to protect the complainant in the educational setting. For more information on timeframes and interim measures, see questions F-8 and G-1 to G-3.

D. Responsible Employees and Reporting[22]

D-1. Which school employees are obligated to report incidents of possible sexual violence to school officials?

Answer: Under Title IX, whether an individual is obligated to report incidents of alleged sexual violence generally depends on whether the individual is a responsible employee of the school. A responsible employee must report incidents of sexual violence to the Title IX coordinator or other appropriate school designee, subject to the exemption for school counseling employees discussed in question E-3. This is because, as discussed in question A-4, a school is obligated to address sexual violence about which a responsible employee knew or should have known. As explained in question C-3, the Title IX coordinator must be informed of all reports and complaints raising Title IX issues, even if the report or

[22] This document addresses only Title IX's reporting requirements. It does not address requirements under the Clery Act or other federal, state, or local laws, or an individual school's code of conduct.

complaint was initially filed with another individual or office, subject to the exemption for school counseling employees discussed in question E-3.

D-2. Who is a "responsible employee"?

Answer: According to OCR's *2001 Guidance*, a responsible employee includes any employee: who has the authority to take action to redress sexual violence; who has been given the duty of reporting incidents of sexual violence or any other misconduct by students to the Title IX coordinator or other appropriate school designee; or whom a student could reasonably believe has this authority or duty.[23]

A school must make clear to all of its employees and students which staff members are responsible employees so that students can make informed decisions about whether to disclose information to those employees. A school must also inform all employees of their own reporting responsibilities and the importance of informing complainants of: the reporting obligations of responsible employees; complainants' option to request confidentiality and available confidential advocacy, counseling, or other support services; and complainants' right to file a Title IX complaint with the school and to report a crime to campus or local law enforcement.

Whether an employee is a responsible employee will vary depending on factors such as the age and education level of the student, the type of position held by the employee, and consideration of both formal and informal school practices and procedures. For example, while it may be reasonable for an elementary school student to believe that a custodial staff member or cafeteria worker has the authority or responsibility to address student misconduct, it is less reasonable for a college student to believe that a custodial staff member or dining hall employee has this same authority.

As noted in response to question A-4, when a responsible employee knows or reasonably should know of possible sexual violence, OCR deems a school to have notice of the sexual violence. The school must take immediate and appropriate steps to investigate or otherwise determine what occurred (subject to the confidentiality provisions discussed in Section E), and, if the school determines that sexual violence created a hostile environment, the school must then take appropriate steps to address the situation. The

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[23] The Supreme Court held that a school will only be liable for money damages in a private lawsuit where there is actual notice to a school official with the authority to address the alleged discrimination and take corrective action. *Gebser v. Lago Vista Ind. Sch. Dist.*, 524 U.S. 274, 290 (1998), and *Davis*, 524 U.S. at 642. The concept of a "responsible employee" under OCR's guidance for administrative enforcement of Title IX is broader.

school has this obligation regardless of whether the student, student's parent, or a third party files a formal complaint. For additional information on a school's responsibilities to address student-on-student sexual violence, see question A-5. For additional information on training for school employees, see questions J-1 to J-3.

D-3. What information is a responsible employee obligated to report about an incident of possible student-on-student sexual violence?

Answer: Subject to the exemption for school counseling employees discussed in question E-3, a responsible employee must report to the school's Title IX coordinator, or other appropriate school designee, all relevant details about the alleged sexual violence that the student or another person has shared and that the school will need to determine what occurred and to resolve the situation. This includes the names of the alleged perpetrator (if known), the student who experienced the alleged sexual violence, other students involved in the alleged sexual violence, as well as relevant facts, including the date, time, and location. A school must make clear to its responsible employees to whom they should report an incident of alleged sexual violence.

To ensure compliance with these reporting obligations, it is important for a school to train its responsible employees on Title IX and the school's sexual violence policies and procedures. For more information on appropriate training for school employees, see question J-1 to J-3.

D-4. What should a responsible employee tell a student who discloses an incident of sexual violence?

Answer: Before a student reveals information that he or she may wish to keep confidential, a responsible employee should make every effort to ensure that the student understands: (i) the employee's obligation to report the names of the alleged perpetrator and student involved in the alleged sexual violence, as well as relevant facts regarding the alleged incident (including the date, time, and location), to the Title IX coordinator or other appropriate school officials, (ii) the student's option to request that the school maintain his or her confidentiality, which the school (*e.g.*, Title IX coordinator) will consider, and (iii) the student's ability to share the information confidentially with counseling, advocacy, health, mental health, or sexual-assault-related services (*e.g.*, sexual assault resource centers, campus health centers, pastoral counselors, and campus mental health centers). As discussed in questions E-1 and E-2, if the student requests confidentiality, the Title IX coordinator or other appropriate school designee responsible for evaluating requests for confidentiality should make every effort to respect this request

and should evaluate the request in the context of the school's responsibility to provide a safe and nondiscriminatory environment for all students.

D-5. If a student informs a resident assistant/advisor (RA) that he or she was subjected to sexual violence by a fellow student, is the RA obligated under Title IX to report the incident to school officials?

Answer: As discussed in questions D-1 and D-2, for Title IX purposes, whether an individual is obligated under Title IX to report alleged sexual violence to the school's Title IX coordinator or other appropriate school designee generally depends on whether the individual is a responsible employee.

The duties and responsibilities of RAs vary among schools, and, therefore, a school should consider its own policies and procedures to determine whether its RAs are responsible employees who must report incidents of sexual violence to the Title IX coordinator or other appropriate school designee.[24] When making this determination, a school should consider if its RAs have the general authority to take action to redress misconduct or the duty to report misconduct to appropriate school officials, as well as whether students could reasonably believe that RAs have this authority or duty. A school should also consider whether it has determined and clearly informed students that RAs are generally available for confidential discussions and do not have the authority or responsibility to take action to redress any misconduct or to report any misconduct to the Title IX coordinator or other appropriate school officials. A school should pay particular attention to its RAs' obligations to report other student violations of school policy (*e.g.*, drug and alcohol violations or physical assault). If an RA is required to report other misconduct that violates school policy, then the RA would be considered a responsible employee obligated to report incidents of sexual violence that violate school policy.

If an RA is a responsible employee, the RA should make every effort to ensure that *before* the student reveals information that he or she may wish to keep confidential, the student understands the RA's reporting obligation and the student's option to request that the school maintain confidentiality. It is therefore important that schools widely disseminate policies and provide regular training clearly identifying the places where students can seek confidential support services so that students are aware of this information. The RA

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[24] Postsecondary institutions should be aware that, regardless of whether an RA is a responsible employee under Title IX, RAs are considered "campus security authorities" under the Clery Act. A school's responsibilities in regard to crimes reported to campus security authorities are discussed in the Department's regulations on the Clery Act at 34 C.F.R. § 668.46.

should also explain to the student (again, before the student reveals information that he or she may wish to keep confidential) that, although the RA must report the names of the alleged perpetrator (if known), the student who experienced the alleged sexual violence, other students involved in the alleged sexual violence, as well as relevant facts, including the date, time, and location to the Title IX coordinator or other appropriate school designee, the school will protect the student's confidentiality to the greatest extent possible. Prior to providing information about the incident to the Title IX coordinator or other appropriate school designee, the RA should consult with the student about how to protect his or her safety and the details of what will be shared with the Title IX coordinator. The RA should explain to the student that reporting this information to the Title IX coordinator or other appropriate school designee does not necessarily mean that a formal complaint or investigation under the school's Title IX grievance procedure must be initiated if the student requests confidentiality. As discussed in questions E-1 and E-2, if the student requests confidentiality, the Title IX coordinator or other appropriate school designee responsible for evaluating requests for confidentiality should make every effort to respect this request and should evaluate the request in the context of the school's responsibility to provide a safe and nondiscriminatory environment for all students.

Regardless of whether a reporting obligation exists, all RAs should inform students of their right to file a Title IX complaint with the school and report a crime to campus or local law enforcement. If a student discloses sexual violence to an RA who is a responsible employee, the school will be deemed to have notice of the sexual violence even if the student does not file a Title IX complaint. Additionally, all RAs should provide students with information regarding on-campus resources, including victim advocacy, housing assistance, academic support, counseling, disability services, health and mental health services, and legal assistance. RAs should also be familiar with local rape crisis centers or other off-campus resources and provide this information to students.

E. Confidentiality and a School's Obligation to Respond to Sexual Violence

E-1. How should a school respond to a student's request that his or her name not be disclosed to the alleged perpetrator or that no investigation or disciplinary action be pursued to address the alleged sexual violence?

Answer: Students, or parents of minor students, reporting incidents of sexual violence sometimes ask that the students' names not be disclosed to the alleged perpetrators or that no investigation or disciplinary action be pursued to address the alleged sexual violence. OCR strongly supports a student's interest in confidentiality in cases involving sexual violence. There are situations in which a school must override a student's request

for confidentiality in order to meet its Title IX obligations; however, these instances will be limited and the information should only be shared with individuals who are responsible for handling the school's response to incidents of sexual violence. Given the sensitive nature of reports of sexual violence, a school should ensure that the information is maintained in a secure manner. A school should be aware that disregarding requests for confidentiality can have a chilling effect and discourage other students from reporting sexual violence. In the case of minors, state mandatory reporting laws may require disclosure, but can generally be followed without disclosing information to school personnel who are not responsible for handling the school's response to incidents of sexual violence.[25]

Even if a student does not specifically ask for confidentiality, to the extent possible, a school should only disclose information regarding alleged incidents of sexual violence to individuals who are responsible for handling the school's response. To improve trust in the process for investigating sexual violence complaints, a school should notify students of the information that will be disclosed, to whom it will be disclosed, and why. Regardless of whether a student complainant requests confidentiality, a school must take steps to protect the complainant as necessary, including taking interim measures before the final outcome of an investigation. For additional information on interim measures see questions G-1 to G-3.

For Title IX purposes, if a student requests that his or her name not be revealed to the alleged perpetrator or asks that the school not investigate or seek action against the alleged perpetrator, the school should inform the student that honoring the request may limit its ability to respond fully to the incident, including pursuing disciplinary action against the alleged perpetrator. The school should also explain that Title IX includes protections against retaliation, and that school officials will not only take steps to prevent retaliation but also take strong responsive action if it occurs. This includes retaliatory actions taken by the school and school officials. When a school knows or reasonably should know of possible retaliation by other students or third parties, including threats, intimidation, coercion, or discrimination (including harassment), it must take immediate

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[25] The school should be aware of the alleged student perpetrator's right under the Family Educational Rights and Privacy Act ("FERPA") torequest to inspect and review information about the allegations if the information directly relates to the alleged student perpetrator and the information is maintained by the school as an education record. In such a case, the school must either redact the complainant's name and all identifying information before allowing the alleged perpetrator to inspect and review the sections of the complaint that relate to him or her, or must inform the alleged perpetrator of the specific information in the complaint that are about the alleged perpetrator. *See* 34 C.F.R. § 99.12(a) The school should also make complainants aware of this right and explain how it might affect the school's ability to maintain complete confidentiality.

and appropriate steps to investigate or otherwise determine what occurred. Title IX requires the school to protect the complainant and ensure his or her safety as necessary. See question K-1 regarding retaliation.

If the student still requests that his or her name not be disclosed to the alleged perpetrator or that the school not investigate or seek action against the alleged perpetrator, the school will need to determine whether or not it can honor such a request while still providing a safe and nondiscriminatory environment for all students, including the student who reported the sexual violence. As discussed in question C-3, the Title IX coordinator is generally in the best position to evaluate confidentiality requests. Because schools vary widely in size and administrative structure, OCR recognizes that a school may reasonably determine that an employee other than the Title IX coordinator, such as a sexual assault response coordinator, dean, or other school official, is better suited to evaluate such requests. Addressing the needs of a student reporting sexual violence while determining an appropriate institutional response requires expertise and attention, and a school should ensure that it assigns these responsibilities to employees with the capability and training to fulfill them. For example, if a school has a sexual assault response coordinator, that person should be consulted in evaluating requests for confidentiality. The school should identify in its Title IX policies and procedures the employee or employees responsible for making such determinations.

If the school determines that it can respect the student's request not to disclose his or her identity to the alleged perpetrator, it should take all reasonable steps to respond to the complaint consistent with the request. Although a student's request to have his or her name withheld may limit the school's ability to respond fully to an individual allegation of sexual violence, other means may be available to address the sexual violence. There are steps a school can take to limit the effects of the alleged sexual violence and prevent its recurrence without initiating formal action against the alleged perpetrator or revealing the identity of the student complainant. Examples include providing increased monitoring, supervision, or security at locations or activities where the misconduct occurred; providing training and education materials for students and employees; changing and publicizing the school's policies on sexual violence; and conducting climate surveys regarding sexual violence. In instances affecting many students, an alleged perpetrator can be put on notice of allegations of harassing behavior and be counseled appropriately without revealing, even indirectly, the identity of the student complainant. A school must also take immediate action as necessary to protect the student while keeping the identity of the student confidential. These actions may include providing support services to the student and changing living arrangements or course schedules, assignments, or tests.

E-2. What factors should a school consider in weighing a student's request for confidentiality?

Answer: When weighing a student's request for confidentiality that could preclude a meaningful investigation or potential discipline of the alleged perpetrator, a school should consider a range of factors.

These factors include circumstances that suggest there is an increased risk of the alleged perpetrator committing additional acts of sexual violence or other violence (e.g., whether there have been other sexual violence complaints about the same alleged perpetrator, whether the alleged perpetrator has a history of arrests or records from a prior school indicating a history of violence, whether the alleged perpetrator threatened further sexual violence or other violence against the student or others, and whether the sexual violence was committed by multiple perpetrators). These factors also include circumstances that suggest there is an increased risk of future acts of sexual violence under similar circumstances (e.g., whether the student's report reveals a pattern of perpetration (e.g., via illicit use of drugs or alcohol) at a given location or by a particular group). Other factors that should be considered in assessing a student's request for confidentiality include whether the sexual violence was perpetrated with a weapon; the age of the student subjected to the sexual violence; and whether the school possesses other means to obtain relevant evidence (e.g., security cameras or personnel, physical evidence).

A school should take requests for confidentiality seriously, while at the same time considering its responsibility to provide a safe and nondiscriminatory environment for all students, including the student who reported the sexual violence. For example, if the school has credible information that the alleged perpetrator has committed one or more prior rapes, the balance of factors would compel the school to investigate the allegation of sexual violence, and if appropriate, pursue disciplinary action in a manner that may require disclosure of the student's identity to the alleged perpetrator. If the school determines that it must disclose a student's identity to an alleged perpetrator, it should inform the student prior to making this disclosure. In these cases, it is also especially important for schools to take whatever interim measures are necessary to protect the student and ensure the safety of other students. If a school has a sexual assault response coordinator, that person should be consulted in identifying safety risks and interim measures that are necessary to protect the student. In the event the student requests that the school inform the perpetrator that the student asked the school not to investigate or seek discipline, the school should honor this request and inform the alleged perpetrator that the school made the decision to go forward. For additional information on interim measures see questions G-1 to G-3. Any school officials responsible for

discussing safety and confidentiality with students should be trained on the effects of trauma and the appropriate methods to communicate with students subjected to sexual violence. See questions J-1 to J-3.

On the other hand, if, for example, the school has no credible information about prior sexual violence committed by the alleged perpetrator and the alleged sexual violence was not perpetrated with a weapon or accompanied by threats to repeat the sexual violence against the complainant or others or part of a larger pattern at a given location or by a particular group, the balance of factors would likely compel the school to respect the student's request for confidentiality. In this case the school should still take all reasonable steps to respond to the complaint consistent with the student's confidentiality request and determine whether interim measures are appropriate or necessary. Schools should be mindful that traumatic events such as sexual violence can result in delayed decisionmaking by a student who has experienced sexual violence. Hence, a student who initially requests confidentiality might later request that a full investigation be conducted.

E-3. What are the reporting responsibilities of school employees who provide or support the provision of counseling, advocacy, health, mental health, or sexual assault-related services to students who have experienced sexual violence?

Answer: OCR does not require campus mental-health counselors, pastoral counselors, social workers, psychologists, health center employees, or any other person with a professional license requiring confidentiality, or who is supervised by such a person, to report, without the student's consent, incidents of sexual violence to the school in a way that identifies the student. Although these employees may have responsibilities that would otherwise make them responsible employees for Title IX purposes, OCR recognizes the importance of protecting the counselor-client relationship, which often requires confidentiality to ensure that students will seek the help they need.

Professional counselors and pastoral counselors whose official responsibilities include providing mental-health counseling to members of the school community are not required by Title IX to report *any* information regarding an incident of alleged sexual violence to the Title IX coordinator or other appropriate school designee.[26]

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[26] The exemption from reporting obligations for pastoral and professional counselors under Title IX is consistent with the Clery Act. For additional information on reporting obligations under the Clery Act, see Office of Postsecondary Education, *Handbook for Campus Safety and Security Reporting* (2011), available at http://www2.ed.gov/admins/lead/safety/handbook.pdf. Similar to the Clery Act, for Title IX purposes, a pastoral counselor is a person who is associated with a religious order or denomination, is recognized by that religious

OCR recognizes that some people who provide assistance to students who experience sexual violence are not professional or pastoral counselors. They include all individuals who work or volunteer in on-campus sexual assault centers, victim advocacy offices, women's centers, or health centers ("non-professional counselors or advocates"), including front desk staff and students. OCR wants students to feel free to seek their assistance and therefore interprets Title IX to give schools the latitude not to require these individuals to report incidents of sexual violence in a way that identifies the student without the student's consent.[27] These non-professional counselors or advocates are valuable sources of support for students, and OCR strongly encourages schools to designate these individuals as confidential sources.

Pastoral and professional counselors and non-professional counselors or advocates should be instructed to inform students of their right to file a Title IX complaint with the school and a separate complaint with campus or local law enforcement. In addition to informing students about campus resources for counseling, medical, and academic support, these persons should also indicate that they are available to assist students in filing such complaints. They should also explain that Title IX includes protections against retaliation, and that school officials will not only take steps to prevent retaliation but also take strong responsive action if it occurs. This includes retaliatory actions taken by the school and school officials. When a school knows or reasonably should know of possible retaliation by other students or third parties, including threats, intimidation, coercion, or discrimination (including harassment), it must take immediate and appropriate steps to investigate or otherwise determine what occurred. Title IX requires the school to protect the complainant and ensure his or her safety as necessary.

In order to identify patterns or systemic problems related to sexual violence, a school should collect aggregate data about sexual violence incidents from non-professional counselors or advocates in their on-campus sexual assault centers, women's centers, or

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order or denomination as someone who provides confidential counseling, and is functioning within the scope of that recognition as a pastoral counselor. A professional counselor is a person whose official responsibilities include providing mental health counseling to members of the institution's community and who is functioning within the scope of his or her license or certification. This definition applies even to professional counselors who are not employees of the school, but are under contract to provide counseling at the school. This includes individuals who are not yet licensed or certified as a counselor, but are acting in that role under the supervision of an individual who is licensed or certified. An example is a Ph.D. counselor-trainee acting under the supervision of a professional counselor at the school.

[27] Postsecondary institutions should be aware that an individual who is counseling students, but who does not meet the Clery Act definition of a pastoral or professional counselor, is not exempt from being a campus security authority if he or she otherwise has significant responsibility for student and campus activities. See fn. 24.

health centers. Such individuals should report only general information about incidents of sexual violence such as the nature, date, time, and general location of the incident and should take care to avoid reporting personally identifiable information about a student. Non-professional counselors and advocates should consult with students regarding what information needs to be withheld to protect their identity.

E-4. Is a school required to investigate information regarding sexual violence incidents shared by survivors during public awareness events, such as "Take Back the Night"?

Answer: No. OCR wants students to feel free to participate in preventive education programs and access resources for survivors. Therefore, public awareness events such as "Take Back the Night" or other forums at which students disclose experiences with sexual violence are not considered notice to the school for the purpose of triggering an individual investigation unless the survivor initiates a complaint. The school should instead respond to these disclosures by reviewing sexual assault policies, creating campus-wide educational programs, and conducting climate surveys to learn more about the prevalence of sexual violence at the school. Although Title IX does not require the school to investigate particular incidents discussed at such events, the school should ensure that survivors are aware of any available resources, including counseling, health, and mental health services. To ensure that the entire school community understands their Title IX rights related to sexual violence, the school should also provide information at these events on Title IX and how to file a Title IX complaint with the school, as well as options for reporting an incident of sexual violence to campus or local law enforcement.

F. Investigations and Hearings

Overview

F-1. What elements should a school's Title IX investigation include?

Answer: The specific steps in a school's Title IX investigation will vary depending on the nature of the allegation, the age of the student or students involved, the size and administrative structure of the school, state or local legal requirements (including mandatory reporting requirements for schools working with minors), and what it has learned from past experiences.

For the purposes of this document the term "investigation" refers to the process the school uses to resolve sexual violence complaints. This includes the fact-finding investigation and any hearing and decision-making process the school uses to determine: (1) whether or not the conduct occurred; and, (2) if the conduct occurred, what actions

the school will take to end the sexual violence, eliminate the hostile environment, and prevent its recurrence, which may include imposing sanctions on the perpetrator and providing remedies for the complainant and broader student population.

In all cases, a school's Title IX investigation must be adequate, reliable, impartial, and prompt and include the opportunity for both parties to present witnesses and other evidence. The investigation may include a hearing to determine whether the conduct occurred, but Title IX does not necessarily require a hearing.[28] Furthermore, neither Title IX nor the DCL specifies who should conduct the investigation. It could be the Title IX coordinator, provided there are no conflicts of interest, but it does not have to be. All persons involved in conducting a school's Title IX investigations must have training or experience in handling complaints of sexual violence and in the school's grievance procedures. For additional information on training, see question J-3.

When investigating an incident of alleged sexual violence for Title IX purposes, to the extent possible, a school should coordinate with any other ongoing school or criminal investigations of the incident and establish appropriate fact-finding roles for each investigator. A school should also consider whether information can be shared among the investigators so that complainants are not unnecessarily required to give multiple statements about a traumatic event. If the investigation includes forensic evidence, it may be helpful for a school to consult with local or campus law enforcement or a forensic expert to ensure that the evidence is correctly interpreted by school officials. For additional information on working with campus or local law enforcement see question F-3.

If a school uses its student disciplinary procedures to meet its Title IX obligation to resolve complaints of sexual violence promptly and equitably, it should recognize that imposing sanctions against the perpetrator, without additional remedies, likely will not be sufficient to eliminate the hostile environment and prevent recurrence as required by Title IX. If a school typically processes complaints of sexual violence through its disciplinary process and that process, including any investigation and hearing, meets the Title IX requirements discussed above and enables the school to end the sexual violence, eliminate the hostile environment, and prevent its recurrence, then the school may use that process to satisfy its Title IX obligations and does not need to conduct a separate Title IX investigation. As discussed in question C-3, the Title IX coordinator should review the disciplinary process

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[28] This answer addresses only Title IX's requirements for investigations. It does not address legal rights or requirements under the U.S. Constitution, the Clery Act, or other federal, state, or local laws.

to ensure that it: (1) complies with the prompt and equitable requirements of Title IX; (2) allows for appropriate interim measures to be taken to protect the complainant during the process; and (3) provides for remedies to the complainant and school community where appropriate. For more information about interim measures, see questions G-1 to G-3, and about remedies, see questions H-1 and H-2.

The investigation may include, but is not limited to, conducting interviews of the complainant, the alleged perpetrator, and any witnesses; reviewing law enforcement investigation documents, if applicable; reviewing student and personnel files; and gathering and examining other relevant documents or evidence. While a school has flexibility in how it structures the investigative process, for Title IX purposes, a school must give the complainant any rights that it gives to the alleged perpetrator. A balanced and fair process that provides the same opportunities to both parties will lead to sound and supportable decisions.[29] Specifically:

- Throughout the investigation, the parties must have an equal opportunity to present relevant witnesses and other evidence.
- The school must use a preponderance-of-the-evidence (*i.e.*, more likely than not) standard in any Title IX proceedings, including any fact-finding and hearings.
- If the school permits one party to have lawyers or other advisors at any stage of the proceedings, it must do so equally for both parties. Any school-imposed restrictions on the ability of lawyers or other advisors to speak or otherwise participate in the proceedings must also apply equally.
- If the school permits one party to submit third-party expert testimony, it must do so equally for both parties.
- If the school provides for an appeal, it must do so equally for both parties.
- Both parties must be notified, in writing, of the outcome of both the complaint and any appeal (see question H-3).

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[29] As explained in question C-5, the parties may have certain due process rights under the U.S. Constitution.

Intersection with Criminal Investigations

F-2. What are the key differences between a school's Title IX investigation into allegations of sexual violence and a criminal investigation?

Answer: A criminal investigation is intended to determine whether an individual violated criminal law; and, if at the conclusion of the investigation, the individual is tried and found guilty, the individual may be imprisoned or subject to criminal penalties. The U.S. Constitution affords criminal defendants who face the risk of incarceration numerous protections, including, but not limited to, the right to counsel, the right to a speedy trial, the right to a jury trial, the right against self-incrimination, and the right to confrontation. In addition, government officials responsible for criminal investigations (including police and prosecutors) normally have discretion as to which complaints from the public they will investigate.

By contrast, a Title IX investigation will never result in incarceration of an individual and, therefore, the same procedural protections and legal standards are not required. Further, while a criminal investigation is initiated at the discretion of law enforcement authorities, a Title IX investigation is not discretionary; a school has a duty under Title IX to resolve complaints promptly and equitably and to provide a safe and nondiscriminatory environment for all students, free from sexual harassment and sexual violence. Because the standards for pursuing and completing criminal investigations are different from those used for Title IX investigations, the termination of a criminal investigation without an arrest or conviction does not affect the school's Title IX obligations.

Of course, criminal investigations conducted by local or campus law enforcement may be useful for fact gathering if the criminal investigation occurs within the recommended timeframe for Title IX investigations; but, even if a criminal investigation is ongoing, a school must still conduct its own Title IX investigation.

A school should notify complainants of the right to file a criminal complaint and should not dissuade a complainant from doing so either during or after the school's internal Title IX investigation. Title IX does not require a school to report alleged incidents of sexual violence to law enforcement, but a school may have reporting obligations under state, local, or other federal laws.

F-3. How should a school proceed when campus or local law enforcement agencies are conducting a criminal investigation while the school is conducting a parallel Title IX investigation?

Answer: A school should not wait for the conclusion of a criminal investigation or criminal proceeding to begin its own Title IX investigation. Although a school may need to delay temporarily the fact-finding portion of a Title IX investigation while the police are gathering evidence, it is important for a school to understand that during this brief delay in the Title IX investigation, it must take interim measures to protect the complainant in the educational setting. The school should also continue to update the parties on the status of the investigation and inform the parties when the school resumes its Title IX investigation. For additional information on interim measures see questions G-1 to G-3.

If a school delays the fact-finding portion of a Title IX investigation, the school must promptly resume and complete its fact-finding for the Title IX investigation once it learns that the police department has completed its evidence gathering stage of the criminal investigation. The school should not delay its investigation until the ultimate outcome of the criminal investigation or the filing of any charges. OCR recommends that a school work with its campus police, local law enforcement, and local prosecutor's office to learn when the evidence gathering stage of the criminal investigation is complete. A school may also want to enter into a memorandum of understanding (MOU) or other agreement with these agencies regarding the protocols and procedures for referring allegations of sexual violence, sharing information, and conducting contemporaneous investigations. Any MOU or other agreement must allow the school to meet its Title IX obligation to resolve complaints promptly and equitably, and must comply with the Family Educational Rights and Privacy Act ("FERPA") and other applicable privacy laws.

The DCL states that in one instance a prosecutor's office informed OCR that the police department's evidence gathering stage typically takes three to ten calendar days, although the delay in the school's investigation may be longer in certain instances. OCR understands that this example may not be representative and that the law enforcement agency's process often takes more than ten days. OCR recognizes that the length of time for evidence gathering by criminal investigators will vary depending on the specific circumstances of each case.

Off-Campus Conduct

F-4. Is a school required to process complaints of alleged sexual violence that occurred off campus?

Answer: Yes. Under Title IX, a school must process all complaints of sexual violence, regardless of where the conduct occurred, to determine whether the conduct occurred in the context of an education program or activity or had continuing effects on campus or in an off-campus education program or activity.

A school must determine whether the alleged off-campus sexual violence occurred in the context of an education program or activity of the school; if so, the school must treat the complaint in the same manner that it treats complaints regarding on-campus conduct. In other words, if a school determines that the alleged misconduct took place in the context of an education program or activity of the school, the fact that the alleged misconduct took place off campus does not relieve the school of its obligation to investigate the complaint as it would investigate a complaint of sexual violence that occurred on campus.

Whether the alleged misconduct occurred in this context may not always be apparent from the complaint, so a school may need to gather additional information in order to make such a determination. Off-campus education programs and activities are clearly covered and include, but are not limited to: activities that take place at houses of fraternities or sororities recognized by the school; school-sponsored field trips, including athletic team travel; and events for school clubs that occur off campus (*e.g.*, a debate team trip to another school or to a weekend competition).

Even if the misconduct did not occur in the context of an education program or activity, a school must consider the effects of the off-campus misconduct when evaluating whether there is a hostile environment on campus or in an off-campus education program or activity because students often experience the continuing effects of off-campus sexual violence while at school or in an off-campus education program or activity. The school cannot address the continuing effects of the off-campus sexual violence at school or in an off-campus education program or activity unless it processes the complaint and gathers appropriate additional information in accordance with its established procedures.

Once a school is on notice of off-campus sexual violence against a student, it must assess whether there are any continuing effects on campus or in an off-campus education program or activity that are creating or contributing to a hostile environment and, if so, address that hostile environment in the same manner in which it would address a hostile environment created by on-campus misconduct. The mere presence on campus or in an

off-campus education program or activity of the alleged perpetrator of off-campus sexual violence can have continuing effects that create a hostile environment. A school should also take steps to protect a student who alleges off-campus sexual violence from further harassment by the alleged perpetrator or his or her friends, and a school may have to take steps to protect other students from possible assault by the alleged perpetrator. In other words, the school should protect the school community in the same way it would had the sexual violence occurred on campus. Even if there are no continuing effects of the off-campus sexual violence experienced by the student on campus or in an off-campus education program or activity, the school still should handle these incidents as it would handle other off-campus incidents of misconduct or violence and consistent with any other applicable laws. For example, if a school, under its code of conduct, exercises jurisdiction over physical altercations between students that occur off campus outside of an education program or activity, it should also exercise jurisdiction over incidents of student-on-student sexual violence that occur off campus outside of an education program or activity.

Hearings[30]

F-5. Must a school allow or require the parties to be present during an entire hearing?

Answer: If a school uses a hearing process to determine responsibility for acts of sexual violence, OCR does not require that the school allow a complainant to be present for the entire hearing; it is up to each school to make this determination. But if the school allows one party to be present for the entirety of a hearing, it must do so equally for both parties. At the same time, when requested, a school should make arrangements so that the complainant and the alleged perpetrator do not have to be present in the same room at the same time. These two objectives may be achieved by using closed circuit television or other means. Because a school has a Title IX obligation to investigate possible sexual violence, if a hearing is part of the school's Title IX investigation process, the school must not require a complainant to be present at the hearing as a prerequisite to proceed with the hearing.

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[30] As noted in question F-1, the investigation may include a hearing to determine whether the conduct occurred, but Title IX does not necessarily require a hearing. Although Title IX does not dictate the membership of a hearing board, OCR discourages schools from allowing students to serve on hearing boards in cases involving allegations of sexual violence.

F-6. May every witness at the hearing, including the parties, be cross-examined?

Answer: OCR does not require that a school allow cross-examination of witnesses, including the parties, if they testify at the hearing. But if the school allows one party to cross-examine witnesses, it must do so equally for both parties.

OCR strongly discourages a school from allowing the parties to personally question or cross-examine each other during a hearing on alleged sexual violence. Allowing an alleged perpetrator to question a complainant directly may be traumatic or intimidating, and may perpetuate a hostile environment. A school may choose, instead, to allow the parties to submit questions to a trained third party (*e.g.*, the hearing panel) to ask the questions on their behalf. OCR recommends that the third party screen the questions submitted by the parties and only ask those it deems appropriate and relevant to the case.

F-7. May the complainant's sexual history be introduced at hearings?

Answer: Questioning about the complainant's sexual history with anyone other than the alleged perpetrator should not be permitted. Further, a school should recognize that the mere fact of a current or previous consensual dating or sexual relationship between the two parties does not itself imply consent or preclude a finding of sexual violence. The school should also ensure that hearings are conducted in a manner that does not inflict additional trauma on the complainant.

Timeframes

F-8. What stages of the investigation are included in the 60-day timeframe referenced in the DCL as the length for a typical investigation?

Answer: As noted in the DCL, the 60-calendar day timeframe for investigations is based on OCR's experience in typical cases. The 60-calendar day timeframe refers to the entire investigation process, which includes conducting the fact-finding investigation, holding a hearing or engaging in another decision-making process to determine whether the alleged sexual violence occurred and created a hostile environment, and determining what actions the school will take to eliminate the hostile environment and prevent its recurrence, including imposing sanctions against the perpetrator and providing remedies for the complainant and school community, as appropriate. Although this timeframe does not include appeals, a school should be aware that an unduly long appeals process may impact whether the school's response was prompt and equitable as required by Title IX.

OCR does not require a school to complete investigations within 60 days; rather OCR evaluates on a case-by-case basis whether the resolution of sexual violence complaints is prompt and equitable. Whether OCR considers an investigation to be prompt as required by Title IX will vary depending on the complexity of the investigation and the severity and extent of the alleged conduct. OCR recognizes that the investigation process may take longer if there is a parallel criminal investigation or if it occurs partially during school breaks. A school may need to stop an investigation during school breaks or between school years, although a school should make every effort to try to conduct an investigation during these breaks unless so doing would sacrifice witness availability or otherwise compromise the process.

Because timeframes for investigations vary and a school may need to depart from the timeframes designated in its grievance procedures, both parties should be given periodic status updates throughout the process.

G. Interim Measures

G-1. Is a school required to take any interim measures before the completion of its investigation?

Answer: Title IX requires a school to take steps to ensure equal access to its education programs and activities and protect the complainant as necessary, including taking interim measures before the final outcome of an investigation. The school should take these steps promptly once it has notice of a sexual violence allegation and should provide the complainant with periodic updates on the status of the investigation. The school should notify the complainant of his or her options to avoid contact with the alleged perpetrator and allow the complainant to change academic and extracurricular activities or his or her living, transportation, dining, and working situation as appropriate. The school should also ensure that the complainant is aware of his or her Title IX rights and any available resources, such as victim advocacy, housing assistance, academic support, counseling, disability services, health and mental health services, and legal assistance, and the right to report a crime to campus or local law enforcement. If a school does not offer these services on campus, it should enter into an MOU with a local victim services provider if possible.

Even when a school has determined that it can respect a complainant's request for confidentiality and therefore may not be able to respond fully to an allegation of sexual violence and initiate formal action against an alleged perpetrator, the school must take immediate action to protect the complainant while keeping the identity of the complainant confidential. These actions may include: providing support services to the

complainant; changing living arrangements or course schedules, assignments, or tests; and providing increased monitoring, supervision, or security at locations or activities where the misconduct occurred.

G-2. How should a school determine what interim measures to take?

Answer: The specific interim measures implemented and the process for implementing those measures will vary depending on the facts of each case. A school should consider a number of factors in determining what interim measures to take, including, for example, the specific need expressed by the complainant; the age of the students involved; the severity or pervasiveness of the allegations; any continuing effects on the complainant; whether the complainant and alleged perpetrator share the same residence hall, dining hall, class, transportation, or job location; and whether other judicial measures have been taken to protect the complainant (*e.g.*, civil protection orders).

In general, when taking interim measures, schools should minimize the burden on the complainant. For example, if the complainant and alleged perpetrator share the same class or residence hall, the school should not, as a matter of course, remove the complainant from the class or housing while allowing the alleged perpetrator to remain without carefully considering the facts of the case.

G-3. If a school provides all students with access to counseling on a fee basis, does that suffice for providing counseling as an interim measure?

Answer: No. Interim measures are determined by a school on a case-by-case basis. If a school determines that it needs to offer counseling to the complainant as part of its Title IX obligation to take steps to protect the complainant while the investigation is ongoing, it must not require the complainant to pay for this service.

H. Remedies and Notice of Outcome[31]

H-1. What remedies should a school consider in a case of student-on-student sexual violence?

Answer: Effective remedial action may include disciplinary action against the perpetrator, providing counseling for the perpetrator, remedies for the complainant and others, as well as changes to the school's overall services or policies. All services needed to remedy the hostile environment should be offered to the complainant. These remedies are separate from, and in addition to, any interim measure that may have been provided prior to the conclusion of the school's investigation. In any instance in which the complainant did not take advantage of a specific service (*e.g.*, counseling) when offered as an interim measure, the complainant should still be offered, and is still entitled to, appropriate final remedies that may include services the complainant declined as an interim measure. A refusal at the interim stage does not mean the refused service or set of services should not be offered as a remedy.

If a school uses its student disciplinary procedures to meet its Title IX obligation to resolve complaints of sexual violence promptly and equitably, it should recognize that imposing sanctions against the perpetrator, without more, likely will not be sufficient to satisfy its Title IX obligation to eliminate the hostile environment, prevent its recurrence, and, as appropriate, remedy its effects. Additional remedies for the complainant and the school community may be necessary. If the school's student disciplinary procedure does not include a process for determining and implementing these remedies for the complainant and school community, the school will need to use another process for this purpose.

Depending on the specific nature of the problem, remedies for the complainant may include, but are not limited to:

- Providing an effective escort to ensure that the complainant can move safely between classes and activities;

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[31] As explained in question A-5, if a school delays responding to allegations of sexual violence or responds inappropriately, the school's own inaction may subject the student to be subjected to a hostile environment. In this case, in addition to the remedies discussed in this section, the school will also be required to remedy the effects of the sexual violence that could reasonably have been prevented had the school responded promptly and appropriately.

- Ensuring the complainant and perpetrator do not share classes or extracurricular activities;
- Moving the perpetrator or complainant (if the complainant requests to be moved) to a different residence hall or, in the case of an elementary or secondary school student, to another school within the district;
- Providing comprehensive, holistic victim services including medical, counseling and academic support services, such as tutoring;
- Arranging for the complainant to have extra time to complete or re-take a class or withdraw from a class without an academic or financial penalty; and
- Reviewing any disciplinary actions taken against the complainant to see if there is a causal connection between the sexual violence and the misconduct that may have resulted in the complainant being disciplined.[32]

Remedies for the broader student population may include, but are not limited to:

- Designating an individual from the school's counseling center who is specifically trained in providing trauma-informed comprehensive services to victims of sexual violence to be on call to assist students whenever needed;
- Training or retraining school employees on the school's responsibilities to address allegations of sexual violence and how to conduct Title IX investigations;
- Developing materials on sexual violence, which should be distributed to all students;
- Conducting bystander intervention and sexual violence prevention programs with students;
- Issuing policy statements or taking other steps that clearly communicate that the school does not tolerate sexual violence and will respond to any incidents and to any student who reports such incidents;

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[32] For example, if the complainant was disciplined for skipping a class in which the perpetrator was enrolled, the school should review the incident to determine if the complainant skipped class to avoid contact with the perpetrator.

- Conducting, in conjunction with student leaders, a campus climate check to assess the effectiveness of efforts to ensure that the school is free from sexual violence, and using that information to inform future proactive steps that the school will take;

- Targeted training for a group of students if, for example, the sexual violence created a hostile environment in a residence hall, fraternity or sorority, or on an athletic team; and

- Developing a protocol for working with local law enforcement as discussed in question F-3.

When a school is unable to conduct a full investigation into a particular incident (*i.e.*, when it received a general report of sexual violence without any personally identifying information), it should consider remedies for the broader student population in response.

H-2. If, after an investigation, a school finds the alleged perpetrator responsible and determines that, as part of the remedies for the complainant, it must separate the complainant and perpetrator, how should the school accomplish this if both students share the same major and there are limited course options?

Answer: If there are limited sections of required courses offered at a school and both the complainant and perpetrator are required to take those classes, the school may need to make alternate arrangements in a manner that minimizes the burden on the complainant. For example, the school may allow the complainant to take the regular sections of the courses while arranging for the perpetrator to take the same courses online or through independent study.

H-3. What information must be provided to the complainant in the notice of the outcome?

Answer: Title IX requires both parties to be notified, in writing, about the outcome of both the complaint and any appeal. OCR recommends that a school provide written notice of the outcome to the complainant and the alleged perpetrator concurrently.

For Title IX purposes, a school must inform the complainant as to whether or not it found that the alleged conduct occurred, any individual remedies offered or provided to the complainant or any sanctions imposed on the perpetrator that directly relate to the complainant, and other steps the school has taken to eliminate the hostile environment, if the school finds one to exist, and prevent recurrence. The perpetrator should not be notified of the individual remedies offered or provided to the complainant.

Sanctions that directly relate to the complainant (but that may also relate to eliminating the hostile environment and preventing recurrence) include, but are not limited to, requiring that the perpetrator stay away from the complainant until both parties graduate, prohibiting the perpetrator from attending school for a period of time, or transferring the perpetrator to another residence hall, other classes, or another school. Additional steps the school has taken to eliminate the hostile environment may include counseling and academic support services for the complainant and other affected students. Additional steps the school has taken to prevent recurrence may include sexual violence training for faculty and staff, revisions to the school's policies on sexual violence, and campus climate surveys. Further discussion of appropriate remedies is included in question H-1.

In addition to the Title IX requirements described above, the Clery Act requires, and FERPA permits, postsecondary institutions to inform the complainant of the institution's final determination and any disciplinary sanctions imposed on the perpetrator in sexual violence cases (as opposed to all harassment and misconduct covered by Title IX) not just those sanctions that directly relate to the complainant.[33]

I. Appeals

I-1. What are the requirements for an appeals process?

Answer: While Title IX does not require that a school provide an appeals process, OCR does recommend that the school do so where procedural error or previously unavailable relevant evidence could significantly impact the outcome of a case or where a sanction is substantially disproportionate to the findings. If a school chooses to provide for an appeal of the findings or remedy or both, it must do so equally for both parties. The specific design of the appeals process is up to the school, as long as the entire grievance process, including any appeals, provides prompt and equitable resolutions of sexual violence complaints, and the school takes steps to protect the complainant in the educational setting during the process. Any individual or body handling appeals should be trained in the dynamics of and trauma associated with sexual violence.

If a school chooses to offer an appeals process it has flexibility to determine the type of review it will apply to appeals, but the type of review the school applies must be the same regardless of which party files the appeal.

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[33] 20 U.S.C. § 1092(f) and 20 U.S.C. § 1232g(b)(6)(A).

I-2. Must an appeal be available to a complainant who receives a favorable finding but does not believe a sanction that directly relates to him or her was sufficient?

Answer: The appeals process must be equal for both parties. For example, if a school allows a perpetrator to appeal a suspension on the grounds that it is too severe, the school must also allow a complainant to appeal a suspension on the grounds that it was not severe enough. See question H-3 for more information on what must be provided to the complainant in the notice of the outcome.

J. Title IX Training, Education and Prevention[34]

J-1. What type of training on Title IX and sexual violence should a school provide to its employees?

Answer: A school needs to ensure that responsible employees with the authority to address sexual violence know how to respond appropriately to reports of sexual violence, that other responsible employees know that they are obligated to report sexual violence to appropriate school officials, and that all other employees understand how to respond to reports of sexual violence. A school should ensure that professional counselors, pastoral counselors, and non-professional counselors or advocates also understand the extent to which they may keep a report confidential. A school should provide training to all employees likely to witness or receive reports of sexual violence, including teachers, professors, school law enforcement unit employees, school administrators, school counselors, general counsels, athletic coaches, health personnel, and resident advisors. Training for employees should include practical information about how to prevent and identify sexual violence, including same-sex sexual violence; the behaviors that may lead to and result in sexual violence; the attitudes of bystanders that may allow conduct to continue; the potential for revictimization by responders and its effect on students; appropriate methods for responding to a student who may have experienced sexual violence, including the use of nonjudgmental language; the impact of trauma on victims; and, as applicable, the person(s) to whom such misconduct must be reported. The training should also explain responsible employees' reporting obligation, including what should be included in a report and any consequences for the failure to report and the procedure for responding to students' requests for confidentiality, as well as provide the contact

[34] As explained earlier, although this document focuses on sexual violence, the legal principles apply to other forms of sexual harassment. Schools should ensure that any training they provide on Title IX and sexual violence also covers other forms of sexual harassment. Postsecondary institutions should also be aware of training requirements imposed under the Clery Act.

information for the school's Title IX coordinator. A school also should train responsible employees to inform students of: the reporting obligations of responsible employees; students' option to request confidentiality and available confidential advocacy, counseling, or other support services; and their right to file a Title IX complaint with the school and to report a crime to campus or local law enforcement. For additional information on the reporting obligations of responsible employees and others see questions D-1 to D-5.

There is no minimum number of hours required for Title IX and sexual violence training at every school, but this training should be provided on a regular basis. Each school should determine based on its particular circumstances how such training should be conducted, who has the relevant expertise required to conduct the training, and who should receive the training to ensure that the training adequately prepares employees, particularly responsible employees, to fulfill their duties under Title IX. A school should also have methods for verifying that the training was effective.

J-2. How should a school train responsible employees to report incidents of possible sexual harassment or sexual violence?

Answer: Title IX requires a school to take prompt and effective steps reasonably calculated to end sexual harassment and sexual violence that creates a hostile environment (*i.e.*, conduct that is sufficiently serious as to limit or deny a student's ability to participate in or benefit from the school's educational program and activity). But a school should not wait to take steps to protect its students until students have already been deprived of educational opportunities.

OCR therefore recommends that a school train responsible employees to report to the Title IX coordinator or other appropriate school official any incidents of sexual harassment or sexual violence that may violate the school's code of conduct or may create or contribute to the creation of a hostile environment. The school can then take steps to investigate and prevent any harassment or violence from recurring or escalating, as appropriate. For example, the school may separate the complainant and alleged perpetrator or conduct sexual harassment and sexual violence training for the school's students and employees. Responsible employees should understand that they do not need to determine whether the alleged sexual harassment or sexual violence actually occurred or that a hostile environment has been created before reporting an incident to the school's Title IX coordinator. Because the Title IX coordinator should have in-depth knowledge of Title IX and Title IX complaints at the school, he or she is likely to be in a better position than are other employees to evaluate whether an incident of sexual

harassment or sexual violence creates a hostile environment and how the school should respond. There may also be situations in which individual incidents of sexual harassment do not, by themselves, create a hostile environment; however when considered together, those incidents may create a hostile environment.

J-3. What type of training should a school provide to employees who are involved in implementing the school's grievance procedures?

Answer: All persons involved in implementing a school's grievance procedures (*e.g.*, Title IX coordinators, others who receive complaints, investigators, and adjudicators) must have training or experience in handling sexual violence complaints, and in the operation of the school's grievance procedures. The training should include information on working with and interviewing persons subjected to sexual violence; information on particular types of conduct that would constitute sexual violence, including same-sex sexual violence; the proper standard of review for sexual violence complaints (preponderance of the evidence); information on consent and the role drugs or alcohol can play in the ability to consent; the importance of accountability for individuals found to have committed sexual violence; the need for remedial actions for the perpetrator, complainant, and school community; how to determine credibility; how to evaluate evidence and weigh it in an impartial manner; how to conduct investigations; confidentiality; the effects of trauma, including neurobiological change; and cultural awareness training regarding how sexual violence may impact students differently depending on their cultural backgrounds.

In rare circumstances, employees involved in implementing a school's grievance procedures may be able to demonstrate that prior training and experience has provided them with competency in the areas covered in the school's training. For example, the combination of effective prior training and experience investigating complaints of sexual violence, together with training on the school's current grievance procedures may be sufficient preparation for an employee to resolve Title IX complaints consistent with the school's grievance procedures. In-depth knowledge regarding Title IX and sexual violence is particularly helpful. Because laws and school policies and procedures may change, the only way to ensure that all employees involved in implementing the school's grievance procedures have the requisite training or experience is for the school to provide regular training to all individuals involved in implementing the school's Title IX grievance procedures even if such individuals also have prior relevant experience.

J-4. What type of training on sexual violence should a school provide to its students?

Answer: To ensure that students understand their rights under Title IX, a school should provide age-appropriate training to its students regarding Title IX and sexual violence. At the elementary and secondary school level, schools should consider whether sexual violence training should also be offered to parents, particularly training on the school's process for handling complaints of sexual violence. Training may be provided separately or as part of the school's broader training on sex discrimination and sexual harassment. However, sexual violence is a unique topic that should not be assumed to be covered adequately in other educational programming or training provided to students. The school may want to include this training in its orientation programs for new students; training for student athletes and members of student organizations; and back-to-school nights. A school should consider educational methods that are most likely to help students retain information when designing its training, including repeating the training at regular intervals. OCR recommends that, at a minimum, the following topics (as appropriate) be covered in this training:

- Title IX and what constitutes sexual violence, including same-sex sexual violence, under the school's policies;
- the school's definition of consent applicable to sexual conduct, including examples;
- how the school analyzes whether conduct was unwelcome under Title IX;
- how the school analyzes whether unwelcome sexual conduct creates a hostile environment;
- reporting options, including formal reporting and confidential disclosure options and any timeframes set by the school for reporting;
- the school's grievance procedures used to process sexual violence complaints;
- disciplinary code provisions relating to sexual violence and the consequences of violating those provisions;
- effects of trauma, including neurobiological changes;
- the role alcohol and drugs often play in sexual violence incidents, including the deliberate use of alcohol and/or other drugs to perpetrate sexual violence;
- strategies and skills for bystanders to intervene to prevent possible sexual violence;
- how to report sexual violence to campus or local law enforcement and the ability to pursue law enforcement proceedings simultaneously with a Title IX grievance; and
- Title IX's protections against retaliation.

The training should also encourage students to report incidents of sexual violence. The training should explain that students (and their parents or friends) do not need to determine whether incidents of sexual violence or other sexual harassment created a

hostile environment before reporting the incident. A school also should be aware that persons may be deterred from reporting incidents if, for example, violations of school or campus rules regarding alcohol or drugs were involved. As a result, a school should review its disciplinary policy to ensure it does not have a chilling effect on students' reporting of sexual violence offenses or participating as witnesses. OCR recommends that a school inform students that the school's primary concern is student safety, and that use of alcohol or drugs never makes the survivor at fault for sexual violence.

It is also important for a school to educate students about the persons on campus to whom they can confidentially report incidents of sexual violence. A school's sexual violence education and prevention program should clearly identify the offices or individuals with whom students can speak confidentially and the offices or individuals who can provide resources such as victim advocacy, housing assistance, academic support, counseling, disability services, health and mental health services, and legal assistance. It should also identify the school's responsible employees and explain that if students report incidents to responsible employees (except as noted in question E-3) these employees are required to report the incident to the Title IX coordinator or other appropriate official. This reporting includes the names of the alleged perpetrator and student involved in the sexual violence, as well as relevant facts including the date, time, and location, although efforts should be made to comply with requests for confidentiality from the complainant. For more detailed information regarding reporting and responsible employees and confidentiality, see questions D-1 to D-5 and E-1 to E-4.

K. Retaliation

K-1. Does Title IX protect against retaliation?

Answer: Yes. The Federal civil rights laws, including Title IX, make it unlawful to retaliate against an individual for the purpose of interfering with any right or privilege secured by these laws. This means that if an individual brings concerns about possible civil rights problems to a school's attention, including publicly opposing sexual violence or filing a sexual violence complaint with the school or any State or Federal agency, it is unlawful for the school to retaliate against that individual for doing so. It is also unlawful to retaliate against an individual because he or she testified, or participated in any manner, in an OCR or school's investigation or proceeding. Therefore, if a student, parent, teacher, coach, or other individual complains formally or informally about sexual violence or participates in an OCR or school's investigation or proceedings related to sexual violence, the school is prohibited from retaliating (including intimidating, threatening, coercing, or in any way

discriminating against the individual) because of the individual's complaint or participation.

A school should take steps to prevent retaliation against a student who filed a complaint either on his or her own behalf or on behalf of another student, or against those who provided information as witnesses.

Schools should be aware that complaints of sexual violence may be followed by retaliation against the complainant or witnesses by the alleged perpetrator or his or her associates. When a school knows or reasonably should know of possible retaliation by other students or third parties, it must take immediate and appropriate steps to investigate or otherwise determine what occurred. Title IX requires the school to protect the complainant and witnesses and ensure their safety as necessary. At a minimum, this includes making sure that the complainant and his or her parents, if the complainant is in elementary or secondary school, and witnesses know how to report retaliation by school officials, other students, or third parties by making follow-up inquiries to see if there have been any new incidents or acts of retaliation, and by responding promptly and appropriately to address continuing or new problems. A school should also tell complainants and witnesses that Title IX prohibits retaliation, and that school officials will not only take steps to prevent retaliation, but will also take strong responsive action if it occurs.

L. First Amendment

L-1. How should a school handle its obligation to respond to sexual harassment and sexual violence while still respecting free-speech rights guaranteed by the Constitution?

Answer: The DCL on sexual violence did not expressly address First Amendment issues because it focuses on unlawful physical sexual violence, which is not speech or expression protected by the First Amendment.

However, OCR's previous guidance on the First Amendment, including the 2001 Guidance, OCR's July 28, 2003, Dear Colleague Letter on the First Amendment,[35] and OCR's October 26, 2010, Dear Colleague Letter on harassment and bullying,[36] remain fully in effect. OCR has made it clear that the laws and regulations it enforces protect students from prohibited discrimination and do not restrict the exercise of any expressive activities or speech protected under the U.S. Constitution. Therefore, when a school works to prevent

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[35] Available at http://www.ed.gov/ocr/firstamend.html.
[36] Available at http://www.ed.gov/ocr/letters/colleague-201010.html.

and redress discrimination, it must respect the free-speech rights of students, faculty, and other speakers.

Title IX protects students from sex discrimination; it does not regulate the content of speech. OCR recognizes that the offensiveness of a particular expression as perceived by some students, standing alone, is not a legally sufficient basis to establish a hostile environment under Title IX. Title IX also does not require, prohibit, or abridge the use of particular textbooks or curricular materials.[37]

M. The Clery Act and the Violence Against Women Reauthorization Act of 2013

M-1. How does the Clery Act affect the Title IX obligations of institutions of higher education that participate in the federal student financial aid programs?

Answer: Institutions of higher education that participate in the federal student financial aid programs are subject to the requirements of the Clery Act as well as Title IX. The Clery Act requires institutions of higher education to provide current and prospective students and employees, the public, and the Department with crime statistics and information about campus crime prevention programs and policies. The Clery Act requirements apply to many crimes other than those addressed by Title IX. For those areas in which the Clery Act and Title IX both apply, the institution must comply with both laws. For additional information about the Clery Act and its regulations, please see http://www2.ed.gov/admins/lead/safety/campus.html.

M-2. Were a school's obligations under Title IX and the DCL altered in any way by the Violence Against Women Reauthorization Act of 2013, Pub. L. No. 113-4, including Section 304 of that Act, which amends the Clery Act?

Answer: No. The Violence Against Women Reauthorization Act has no effect on a school's obligations under Title IX or the DCL. The Violence Against Women Reauthorization Act amended the Violence Against Women Act and the Clery Act, which are separate statutes. Nothing in Section 304 or any other part of the Violence Against Women Reauthorization Act relieves a school of its obligation to comply with the requirements of Title IX, including those set forth in these Questions and Answers, the 2011 DCL, and the *2001 Guidance*. For additional information about the Department's negotiated rulemaking related to the Violence Against Women Reauthorization Act please see http://www2.ed.gov/policy/highered/reg/hearulemaking/2012/vawa.html.

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[37] 34 C.F.R. § 106.42.

N. Further Federal Guidance

N-1. Whom should I contact if I have additional questions about the DCL or OCR's other Title IX guidance?

Answer: Anyone who has questions regarding this guidance, or Title IX should contact the OCR regional office that serves his or her state. Contact information for OCR regional offices can be found on OCR's webpage at https://wdcrobcolp01.ed.gov/CFAPPS/OCR/contactus.cfm. If you wish to file a complaint of discrimination with OCR, you may use the online complaint form available at http://www.ed.gov/ocr/complaintintro.html or send a letter to the OCR enforcement office responsible for the state in which the school is located. You may also email general questions to OCR at ocr@ed.gov.

N-2. Are there other resources available to assist a school in complying with Title IX and preventing and responding to sexual violence?

Answer: Yes. OCR's policy guidance on Title IX is available on OCR's webpage at http://www.ed.gov/ocr/publications.html#TitleIX. In addition to the April 4, 2011, Dear Colleague Letter, OCR has issued the following resources that further discuss a school's obligation to respond to allegations of sexual harassment and sexual violence:

- Dear Colleague Letter: Harassment and Bullying (October 26, 2010), http://www2.ed.gov/about/offices/list/ocr/letters/colleague-201010.pdf
- *Sexual Harassment: It's Not Academic* (Revised September 2008), http://www2.ed.gov/about/offices/list/ocr/docs/ocrshpam.pdf
- *Revised Sexual Harassment Guidance: Harassment of Students by Employees, Other Students, or Third Parties* (January 19, 2001), http://www2.ed.gov/about/offices/list/ocr/docs/shguide.pdf

In addition to guidance from OCR, a school may also find resources from the Departments of Education and Justice helpful in preventing and responding to sexual violence:

- Department of Education's Letter to Chief State School Officers on Teen Dating Violence Awareness and Prevention (February 28, 2013) https://www2.ed.gov/policy/gen/guid/secletter/130228.html

- Department of Education's National Center on Safe Supportive Learning Environments http://safesupportivelearning.ed.gov/

- Department of Justice, Office on Violence Against Women http://www.ovw.usdoj.gov/

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Strategic Plan and Dashboard of Principal Metrics

The Board of Visitors adopted the University's 2014-18 Strategic Plan this past September, following discussion and deliberation throughout the University community during the full course of the 2013-14 academic year resulting in strong consensus.

This past December, the Board reviewed and commended the dashboard of principal metrics for the Strategic Plan. The metrics are annual in nature, given the inherent year-long cycle of academia. Going forward, the metrics will be updated in full in the first quarter of each June-July fiscal year.

The annual dashboard is included here for reference along with the Strategic Plan. Current partial and proxy data is included in the next tab providing updates on Strategic Priorities.

LONGWOOD
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LOOKING TO OUR THIRD CENTURY
Strategic Plan 2014-2018

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:

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

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 the preparation of citizen leaders

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

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

Our Priorities:

Retention & Graduation – it is a moral imperative, and likewise catalytic from the standpoint of revenue and the spirit of the University; academic rigor is fundamentally part of the solution, as is affordability

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

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

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

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

Strengthening the University Community – faculty and staff compensation must rise substantially; opportunities for professional development must increase; diversity must be fostered; all of which will enhance retention and hiring

Organization, Structuring, and Governance – we must give continually fresh attention to how Longwood is structured and to our policies, practices, data methodologies, and stewardship of resources

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 and monitor as barometers that will reflect our institution-wide progress:

- Student Progress to Graduation
- Consensus on General Education, Implementation, and Assessment
- Alumni Annual Giving Rate
- Overall Attendance at University Events (Performances, Games, Exhibits, Conferences, Lectures, etc.)
- Total Population of the Local Community
- Compensation for Faculty and Staff
- Composite Financial Index (CFI)

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LOOKING TO OUR THIRD CENTURY
Strategic Plan 2014-2018

– Dashboard of Principal Metrics –

Retention & Graduation -- It is a moral imperative, and likewise catalytic from the standpoint of revenue and the spirit of the University; academic rigor is fundamentally part of the solution, as is affordability

Principal Metric:
Student Progress to Graduation

Undergraduate	Fall 2010	Fall 2011	Fall 2012	Fall 2013	Fall 2014
Applications Prior Year	*4402*	*4075*	*4167*	*4290*	*4576*
Freshmen	975	1055	1007	1091	1102
Sophomores	781	760	840	809	854
Juniors	746	710	687	774	745
Seniors	654	704	668	635	734
5th year +	NA	214	224	259	223
Transfers and Part-time	957	744	885	891	907

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

Principal Metric:
Alumni Annual Giving Participation

	FY2010	FY2011	FY2012	FY2013	FY2014
Alumni of Record	28,829	30,360	30,024	30,868	31,700
Alumni Donors	3,948	3,465	3,293	3,133	2,841
% Rate	13.69%	11.41%	10.97%	10.15%	8.96%

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

FY2010	FY2011	FY2012	FY2013	FY2014
25,717	29,099	28,969	25,293	34,584

Principal Metric:
Overall Attendance at University Events (M&W Basketball, LCVA, Conferences, Events, B&B Nights)

Prosperity of One of America's Oldest Two-College Communities -- Farmville, Prince Edward, the surrounding region, H-SC, and Longwood stand together where the Civil War ended and Civil Rights began; we will thrive together.

July 2010	July 2011	July 2012	July 2013	July 2014
30,030	30,714	30,841	30,794	30,635

Principal Metric:
Total Population of Buckingham, Cumberland, and Prince Edward Counties (by registered voters)

Strengthening the University Community – Faculty and staff compensation must rise substantially; opportunities for professional development must increase; diversity must be fostered; all of which will enhance retention and hiring.

Principal Metric:
Average Compensation for Faculty and Staff

	FY2010	FY2011	FY2012	FY2013	FY2014
Classified Staff	$37,130	$37,068	$38,975	$39,549	$40,969
AP Staff	$56,712	$57,577	$58,673	$60,458	$62,433
Professor	$74,300	$77,300	$77,300	$77,200	$80,000
Associate Professor	$63,100	$63,000	$61,400	$64,300	$65,800
Assistant Professor	$52,500	$53,800	$55,100	$57,100	$59,600
Instructor	$49,000	$56,400	$57,200	$60,000	$55,700
All Faculty	*$59,725*	*$62,625*	*$62,750*	*$64,650*	*$65,275*

Organization, Structuring, and Governance – We must give continually fresh attention to how Longwood is structured and to our policies, practices, data methodologies, and stewardship of resources.

2009	FY2010	FY2011	FY2012	FY2013	FY2014
2.01	4.10	4.19	-1.14	3.98	3.55

Principal Metric:
Composite Financial Index (CFI)

**** The Strategic Priority of Renewing General Education will be gauged as a matter of process until the appropriate juncture of implementation.***

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Strategic Priorities

This tab includes further information regarding the University's Strategic Priorities. This past December, the BOV began to focus work on Strategic Priorities through task forces of BOV members and University executives.

Task forces aligned with the University's Strategic Priorities serve to powerfully advance progress, a forward-looking governance approach different than having a traditional committee structure for the board along operational lines (such as facilities, athletics, etc.). The "task force" model allows the BOV and University to focus on what most needs to improve and change moving forward, and will allow the BOV to continue to function as a "committee of the whole" with regards to standard operational matters, which has been working well for several years now.

As constituted this past December, task force membership is set forth below. At each regular BOV meeting going forward, time will be spent broken out into task force sessions, as well as all together in full session. Between regular BOV meetings, University executives will naturally continue their focus and work on strategic priorities and consult with BOV task force members. The task forces are intended to be deliberative bodies for perspective, ideas, and discussion (and in that regard they do not have chairpersons). Consequential decisions would still be made at the full BOV level.

This tab notes supporting activities and current partial and proxy data for each Strategic Priority --- intended in chief to spur task force discussion. The intent of the Strategic Plan is for precise tactical supporting activities to be fluid and evolving based on what proves truly effective.

Strategic Priority Task Forces

Retention & Graduation
Hallock and Radcliff (with Kindon, Perkins, and Pierson)

*Renewing General Education** (see below)

National Marketing
Hansen and Ward (with Austin, Hodges, and Kindon)

Foot Traffic by Alumni and Friends
Anderson and Johnson (with Austin, Bratcher, and Hodges)

Prosperity of One of America's Oldest Two-College Communities
Busser and Trigiani (with Bratcher, Copeland, and Pierson)

Strengthening the University Community
Mobley and Walker (with Copeland, Perkins, and Pierson)

Organization, Structuring, and Governance
Schwartz and Wertz (with Copeland, Bratcher, and Austin)

*Regarding *Renewing General Education* (per above), since curriculum reform is a matter for the faculty to consider initially (in the standard system of shared governance in American higher education), this strategic priority will be addressed at a broad consultative level during the period ahead, in which the faculty continues to develop ideas and plans. At the upcoming meeting, Faculty representatives will join the full BOV for dinner to discuss the process and status of "general education" reform thus far.

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Retention & Graduat

It is a moral imperative, and likewise catalytic from the standpo ... the spirit of the University; academic rigor is fundamentally part of the solution, ... ability

Task Force

Board of Visitors: David Hallock, Marianne Radcliff
Administration: Victoria Kindon, Ken Perkins, Tim Pierson

Principal Metric

Student Progress to Graduation

Undergraduate	Fall 2010	Fall 2011	Fall 2012	Fall of 2013	Fall of 2014
Applications	*4402*	*4075*	*4167*	*4290*	*4576*
Freshmen	975	1055	1007	1091	1074
Sophomores	781	760	840	809	854
Juniors	746	710	687	774	745
Seniors	654	704	668	635	734
5th year +	NA	214	224	259	223
Other students (transfers, part-time)	957	744	885	891	907
Key for each class:	Class of 2014	Class of 2015	Class of 2016	Class of 2017	Class of 2018
Total enrollment	4113	4187	4311	4459	4537

Supporting Activities

- Strengthening our tracking analysis and reporting capabilities, and utilizing the resultant data to impact our enrollment, retention, and class progression.
- Improving the personalized touch given to students to make the most of their residential experience and academic development.
- Enhancing the mentoring capacity offered to students to compliment classic academic advising.
- Removing bureaucratic obstacles and other barriers to timely degree completion.
- Engaging the most promising students with leadership opportunities and other enrichment activities so that their talents can remain at Longwood throughout their academic careers.
- Increasing the academic credentials of incoming students so that the lowest quartile of each admitted class matches the third quartile.
- Enhancing the University's graduate programs to offer ready opportunities for progression to our undergraduates and to further build the academic excellence of the institution.

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Current Partial and Proxy Data

Retention

	Freshman Fall Enrollment	Freshman Spring Enrollment	Freshman Fall-to-Spring Retention Rate	Sophomore Fall Enrollment	Freshman-to-Sophomore Retention Rate
2010 Cohort (Class of 2014)	975	*Data not warehoused*	*Data not warehoused*	761	78.70%
2011 Cohort (Class of 2015)	1,055	*Data not warehoused*	*Data not warehoused*	841	80.71%
2012 Cohort (Class of 2016)	1,007	920	91.36%	809	81.55%
2013 Cohort (Class of 2017)	1,091	1,009	92.48%	872	80.89%
2014 Cohort (Class of 2018)	1,074	996	92.74%	*TBD*	*TBD*

Applications

	For Fall 2013 (as of March 15)	For Fall 2014 (as of March 15)	For Fall 2015 (as of March 15)	YOY Comparison
Applications	4133	4414	4551	+3%
Out-of-State Subset	*220*	*440*	*632*	*+44%*
Admitted	2963	3059	3101	+1%
Out-of-State Subset	*136*	*214*	*340*	*+59%*
Deposits	278	293	269	-8%
Out-of-State Subset	*8*	*11*	*20*	*+82%*

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National Marketing

Institution-wide endeavor and marketing collaboration will make one of the fifty oldest NCAA Division I schools as well known as it should be.

Task Force

Board of Visitors: Eric Hansen, Lacy Ward
Administration: Troy Austin, Courtney Hodges, Victoria Kindon

Principal Metric

Alumni Annual Giving Participation

	FY2010	FY2011	FY2012	FY2013	FY2014
Alumni of Record	28,829	30,360	30,024	30,868	31,700
Alumni Donors	3,948	3,465	3,293	3,133	2,841
% Rate	13.69%	11.41%	10.97%	10.15%	8.96%

Alumni of Record - all alumni and alumni non-degree with accurate addresses to whom we mail
Alumni Donors - all alumni and alumni non-degree who have made a gift - including soft credit from a spouse/partner gift

Supporting Activities

- Offering opportunities for engagement to the entire alumni base to ensure that the University is in contact not just for development purposes but to foster lifetime engagement.
- Increasing University membership in higher education organizations to ensure that Longwood contributes a voice to the ongoing national dialogue.
- Increasing faculty participation in national conferences to expand the reach of their thought leadership within their respective fields.
- Redesigning Longwood.edu to be on the leading edge of university webpages -- one that aids faculty and staff in reaching key constituency groups.
- Expanding our capability and participation on social media platforms to keep up with innovations in how people consume information.
- Likewise, fortifying traditional public relations activities and seizing opportunities to spotlight Longwood activities in television, radio, print, and related media.
- Committing to advertising in key markets to expand Longwood's brand awareness.

Current Partial and Proxy Data

Alumni Donors YTD as of 2/28

2015	2014	2013	2012	2011	2010	2009
2,414	2,191	2,193	2,156	2,620	2,775	2,518

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Foot Traffic by Alumni & Friends

Philanthropy and public support for the University hinge on visits to campus and in-person engagement, since those who see our beautiful campus love Longwood.

Task Force
Board of Visitors: Eileen Anderson, Thomas Johnson
Administration: Troy Austin, Dick Bratcher, Courtney Hodges

Principal Metric
Overall Attendance at University Events

	FY2010	FY2011	FY2012	FY2013	FY2014
M&W Basketball*	16,371	19,153	15,375	18,858	24,301
LCVA^	4,382	4,982	8,630	1,471	5,319
Conferences and Events~	3,916	3,916	3,916	3,916	3,916
B&B Nights Occupied<	1,048	1,048	1,048	1,048	1,048
TOTAL	**25,717**	**29,099**	**28,969**	**25,293**	**34,584**

* combined men's and women's home attendance
^ combined total daily visitors plus receptions and education programs
~Estimated attendance at events requiring AV (2013-14 figure used as estimate for previous years)
<Annual Room total nights occupied

NOTES:
LCVA figures for 2009-10 based on average of following 3 years
Figures for B&B occupancy and conferences and events estimate are for 13-14 but also used to provide estimates for prior years

Supporting Activities and Initiatives

- Continuing execution of Longwood's Campus Master Plan specifically with a focus on enhancing ease of visiting campus --- regarding parking, signage, accommodations, etc.
- Creating a user-friendly calendar of events, with increased usage among current and prospective students, faculty, staff, parents, alumni, community members, and other stakeholders.
- Conceiving and initiating a broader and richer sequence of events to amplify the work of our students and faculty, and the unique assets of the University.
- Focusing on Commonwealth transportation considerations to enhance accessibility of campus, such as increasing the number of road signs for the University and widening Route 307.

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Current Partial and Proxy Data

	FY10	FY11	FY12	FY13	FY14	FY15YTD
M & W Basketball	16371	19153	15375	18858	24301	22843
LCVA	4382	4982	8630	1471	5319	3478
Conferences and Events	3916	3916	3916	3916	3916	8905
B&B Nights occupied	1048	1048	1048	1048	1048	640
Total	25717	29099	28969	25293	44584	35866

*Both men's and women's basketball had one less home game this year;
average attendance was up for both (1183 to 1278 for men; 460 to 520 for women)

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Prosperity of One of America's Oldest Two-College Communities

Farmville, Prince Edward, the surrounding region, H-SC, and Longwood stand together where the Civil War ended and Civil Rights began; we will thrive together.

Task Force

Board of Visitors: Katherine Busser, Pia Trigiani
Administration: Dick Bratcher, Ken Copeland, Tim Pierson

Principal Metric

Total Population of the Local Community *(by registered voters)*

	Jul-10	Jul-11	Jul-12	Jul-13	Jul-14
Buckingham County	9,900	10,131	10,194	10,033	10,032
Cumberland County	6,749	6,765	6,789	6,845	6,788
Prince Edward County	13,381	13,818	13,858	13,916	13,815
Total	30,030	30,714	30,841	30,794	30,635

Supporting Activities

- Marketing Farmville as a vibrant college town to regional and national audiences.
- Encouraging alumni to participate in Farmville community life, including as retirees moving to the community or small business owners.
- Coordinating activities and events with Hampden-Sydney College to maximize community and student engagement.
- Collaborating with local businesses to allow Lancer Card dollars to be used broadly, which would serve to further connect the community and University, and increase revenues to local businesses.
- Connect campus pedestrians with Main Street by emphasizing this connection in the preparation and implementation of the University Campus Master Plan.

Current Partial and Proxy Data

Voter registration has some natural fluctuation through election cycles, making an annual regular data point the most useful. As of March 15, 2015, the three-county region has a total of 29,297 registered voters, a number likely to increase through the spring and summer.

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Strengthening the University Community

Faculty and staff compensation must rise substantially; opportunities for professional development must increase; diversity must be fostered; all of which will enhance retention and hiring.

Task Force

Board of Visitors: Steve Mobley, Shelby Walker
Administration: Ken Copeland, Ken Perkins, Tim Pierson

Principal Metric

Compensation for Faculty and Staff

	FY2010	FY2011	FY2012	FY2013	FY2014
Classified Staff	$37,130	$37,068	$38,975	$39,549	$40,969
AP Staff	$56,712	$57,577	$58,673	$60,458	$62,433
Professor	$74,300	$77,300	$77,300	$77,200	$80,000
Associate Professor	$63,100	$63,000	$61,400	$64,300	$65,800
Assistant Professor	$52,500	$53,800	$55,100	$57,100	$59,600
Instructor	$49,000	$56,400	$57,200	$60,000	$55,700
All Faculty	*$59,725*	*$62,625*	*$62,750*	*$64,650*	*$65,275*

Supporting Activities

- Improving opportunities for professional development to build the University's human capital and increase the level of employee engagement and satisfaction.
- Increasing faculty and staff compensation as a means of attracting and retaining talent.
- Emphasizing the importance of diversity within the University and working to build a culture of diversity among students, faculty, and staff.
- Expanding day care options for students, faculty, and staff to maximize educational and employment opportunities for working families.

Current Partial and Proxy Data

With the internally and state funded compensation increases, it is anticipated that the average faculty salary by the close of 2014-15 will be more than $67,000, and that the average will be more than $69,000 in 2015-16.

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Organization, Structuring & Governance

We must give continually fresh attention to how Longwood is structured and to our policies, practices, data methodologies, and stewardship of resources.

Task Force

Board of Visitors: Brad Schwartz, Bob Wertz

Administration: Dick Bratcher, Ken Copeland, Troy Austin

Principal Metric

Composite Financial Index (CFI) – Reflecting the University and University Foundation

		FY2008	FY2009	FY2010	FY2011	FY2012	FY2013	FY2014
Expendable Net Assets		38,170,796	45,970,637	56,359,577	45,250,424	48,250,916	62,608,032	83,152,500
Total Expenses		99,239,229	103,809,055	99,062,525	105,136,557	115,250,532	116,105,359	122,828,827
Total Long Term Debt		65,093,404	69,572,404	66,551,889	62,034,117	59,074,377	55,440,188	53,489,129
Change in Net Assets		2,349,315	-8,295,951	25,282,706	29,500,446	6,630,599	19,172,525	19,413,309
Total Net Assets (Beg Year)		208,627,384	212,544,354	191,207,165	216,066,485	245,566,931	252,197,530	271,370,055
Net Operating Income		-594,940	3,923,675	3,808,716	5,804,180	-10,528,804	6,451,432	2,938,204
Total Operating Revenues		90,561,691	98,033,951	94,818,692	102,681,616	104,721,728	113,268,027	116,604,923
Primary Reserve Ratio - Expendable net assets / total expenses		0.38	0.44	0.57	0.43	0.42	0.54	0.68
Viability Ratio – Expendable net assets / total long term debt		0.59	0.66	0.85	0.73	0.82	1.13	1.55
Return on Net Assets Ratio – Change in net assets / total net assets (BOY)		0.01	-0.04	0.13	0.14	0.03	0.08	0.07
Net Operating Revenues Ratio – Net Operating Income / Total Operating Revenues		-0.01	0.04	0.04	0.06	-0.10	0.06	0.03
	Factor							
PRR	0.133	2.89	3.33	4.28	3.24	3.15	4.05	5.09
VR	0.417	1.41	1.58	2.03	1.75	1.96	2.71	3.73
RONAR	0.02	0.56	-1.95	6.61	6.83	1.35	3.80	3.58
NORR	0.013	-0.51	3.08	3.09	4.35	-7.73	4.38	1.94
	Weight							
PRR	35%	1.01	1.17	1.50	1.13	1.10	1.42	1.78
VR	10%	0.14	0.16	0.20	0.17	0.20	0.27	0.37
RONAR	20%	0.11	-0.39	1.32	1.37	0.27	0.76	0.72
NORR	35%	-0.18	1.08	1.08	1.52	-2.71	1.53	0.68
CFI		**1.09**	**2.01**	**4.10**	**4.19**	**-1.14**	**3.98**	**3.55**

Supporting Activities

- Enhancing data gathering capabilities and tracking and analysis tools to aid in financial and strategic decision making.

- Enhance financial forecasting to keep the University on sound financial footing and encourage proper stewardship of all revenues.
- Utilizing new technologies to facilitate campus activities, including increased use of paperless forms.
- Coordinating the range of compliance work across the University to encourage efficiency and comprehensive attention.
- Reviewing and freshly organizing University policymaking by reviewing best practices and ensuring that policies continue to serve the best needs of the Longwood community.

Current Partial and Proxy Data

One of the complications of budget and finance in higher education is that revenue and expenses are notably "lumpy" rather than smooth. FY2014-15 is tracking similarly to FY2013-14 with regards to revenue and expenditures against budget.

	YTD 1/31/15	As Percent of Budget	YTD 1/31/14	As Percent of Budget	YOY Delta
Revenue					
E&G	$45,239,220	72.70%	$41,575,117	70.22%	$3,664,103
Auxilary	$48,921,160	96.38%	$47,696,756	96.50%	$1,224,404
Expense					
E&G	$36,862,365	59.62%	$35,518,768	60.21%	($1,343,597)
Auxiliary	$31,180,038	63.96%	$28,377,974	62.07%	($2,802,064)