

Faculty Senate Finance and Planning Committee

Faculty Senate – 11/30/17

Committee Members: [Dr. Lissa Power-deFur](#), [Dr. Brett Hursey](#), [Dr. Xun Bian](#), [Professor Jeff Halliday](#) (Chair)

Fall Budget & Finance Forum Recap

The Faculty Senate Finance & Planning Committee hosted a Budget & Finance Forum focusing on Academic Affairs budgeting on Monday, Oct. 30. Provost and Vice President for Academic Affairs Dr. Joan Neff and Vice President for Administration and Finance Ken Copeland each presented and answered questions. Roughly 70 were in attendance, including all college deans, and representation from faculty, staff and administration across campus. The committee appreciates everyone's attendance and participation. The hour-and-five-minute audio recording has been submitted for the Senate website. {It's also hosted [here on SoundCloud](#) as a backup.}

Mr. Copeland spoke for the first 31 minutes, with a few questions posed during his portion, that was followed by Dr. Neff, and then an extended question-and-answer session. Questions posed to Dr. Neff and Mr. Copeland are summarized as follows and are listed with their corresponding times: do Education and General (E & G) monies include summer and intercession (5:45), what E & G pays for other than salaries (6:30), do we ever run a surplus (24:24), status of reserves and on what can they be spent (28:10), is there a different way of funding academic affairs besides summer and intercession (39:10), should we adjust the summer school model (number of students enrolled to determine full pay) to incentivize faculty teaching (41:25), can we create a summer session that's like an academic semester (44:30), where did money come from for faculty raises (49:00), the use and budgeting of adjunct faculty (50:22), how much funds are supporting the core curriculum (54:07), why is faculty research and travel cut where there are budget pressures (56:43), since summer and intercession are so vital, what are the reasons for why that revenue is decreasing? (1:01:11)

The committee collected participant feedback immediately after the forum. There were 32 completed responses.

Faculty, Staff or Student: 16 Faculty, 12 Staff, 2 Self-Reported as Administrative Professional, 2 Left Blank

The information was presented in an organized, balanced manner that left enough time for questions.

14 – Strongly Agree 17 – Agree 1 – Undecided

The forum provided me with a more clear understanding of the Academic Affairs budget.

10 – Strongly Agree 19 – Agree 2 – Undecided 1 – Disagree

My concerns &/or questions regarding academic budgeting were directly addressed.

8 – Strongly Agree 9 – Agree 12 – Undecided 2 – Disagree 1 – Strongly Disagree

The information distributed through handouts helped me better understand the presentation content.

10 – Strongly Agree 12 – Agree 5 – Undecided 5 – Disagree

I would attend a forum like this in the future, and would also recommend it to colleagues.

18 – Strongly Agree 13 – Agree 1 – Undecided

The results and provided suggestions will guide future event organization and content. In addition, the committee will again be working with Dr. Bill Abrams and Longwood's representatives of the Virginia Conference of the American Association of University Professors (AAUP) for the annual spring budget forum for the campus community. We invite faculty to share concerns, recommendations and questions.

Follow-Up on Question Regarding E & G Expenditure

During the Nov. 2 Senate meeting, Dr. Carl Riden asked a question regarding the University Budget Office's [2017-2018 Operating Budget Plan](#). On page 10, the 'Education & General (E & G) Expenditure Comparison By Category' charts show that from last year to this year, expenditures for Instruction and Academic Support were down .2 percent from 62.1 to 61.9, while in the past year expenditures for Institutional Support rose by a full percentage point, from 14.6 to 15.6. On page 18 of the plan, the Budget Allocation Ratio is shown over four years, with some context for these changes. When asked for clarity, Mr. Copeland responded that while the

Instruction and Academic Support percentage went down, the actual dollar amount increased from \$42,298,733 for fiscal year 2017 to \$43,760,449 for fiscal year 2018. These dollar amounts are reflected in the charts on page 10. Quoting Mr. Copeland, “The lion’s share of the change in Institutional Support has to do with salaries and associated benefits in the areas that are heavy with classified employees. ... There were no classified increases in 2017, only bonuses, which had no benefits attached to them, so when the state [mandated salary] increase took effect in July of this year, there were benefits attached to that increase for fiscal year 2018, and that resulted in a bigger jump in Institutional Support.”

University Planning Council – Finance Subcommittee Meeting Recap

Our Senate committee works in conjunction with the [University Planning Council](#) (UPC), with each of us additionally serving as members of the UPC’s Finance Subcommittee. The UPC met as a whole on October 19. Some key takeaways related to the Finance Subcommittee include:

- Admissions reported application numbers (1,571 as of 10/19) were 25 percent higher than that time last year, with a significant number of deposits as well.
- A focused presentation on philanthropy efforts and scholarships. The [Longwood Foundation](#) awards roughly \$1.6 million annually, and their endowment market value is [stated at over \\$50 million](#). It was announced that scholarship disbursement is being taken over by the Accounts Payable Office and the Longwood Foundation staff is analyzing scholarship awarding across campus, stating departments have very different application and selection processes. The staff is looking to begin using AcademicWorks as a portal site to first track scholarship data, and eventually create a student-focused interface for searching available scholarships, streamlining the application process.
- The Finance Subcommittee reported items previously discussed during the [10/12/17 Senate meeting](#).

The next UPC meeting is tentatively scheduled for January 30, 2018.