



CELEBRATING TRADITION & FORGING CHANGE:

AN EVOLVING PLAN FOR WILLIAM & MARY

September 2009



WILLIAM & MARY

A LIBERAL ARTS UNIVERSITY OF
COMPELLING ACADEMIC DISTINCTION

A Unique Combination

William & Mary effectively blends characteristics that could conflict, but instead are mutually supportive in our context. The ampersand in our name represents the balance we strive to achieve. That balance reflects the blend of characteristics that help make W&M so significant. Our strategic planning process is celebrating tradition & forging change.

William & Mary

Celebrating tradition & Forging change

Alma mater of a nation & Citizen of the world

Dedicated to teaching & Devoted to research

Large enough for excellence & Small enough for community

Whole-heartedly undergraduate & Strategically professional and graduate

Supported by alumni committed to serve & Inspired by students prepared to lead

Our Vision

William & Mary will continue to be one of the world's great liberal arts universities. Already a university of compelling academic distinction, the College will expand its interdisciplinary study, global relevance, and faculty-student research, as well as its lifelong ties with alumni. Our students come wanting to change the world and will leave with the tools to do it.



Our Overarching Grand Challenge

President Reveley launched a new strategic planning process in academic year 2008-2009. The strategic plan identified one overarching grand challenge for the future of the university. That is to be a leader among liberal arts universities. The centerpiece of our strategy is to define and showcase William & Mary as a university of compelling academic distinction, one of the world's great liberal arts universities. All of our other aspirations flow from this commitment.

Major actions and decisions moving forward will build on our ability to combine the best elements of a liberal arts college and a research university with select graduate and professional programs. W&M's success in blending those two aspects is our great competitive advantage. To an extraordinary degree we effectively integrate teaching and scholarship and provide powerful faculty-student interaction. We will build on that foundation. We will increase our emphasis on interdisciplinary and international programs.

Other Critical Challenges

The planning process targets five other critical challenges in support of advancing as a leader among liberal arts universities.

- Build and support a more fully diverse W&M community.
- Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M.
- Implement a new financial model that can fund our aspirations.
- Provide the administrative resources and infrastructure required for a university in the 21st Century.
- Explain and promote W&M through a more effective communications structure and strategy.

We recognize the excellence that comes with inclusiveness, and we are committed to being a welcoming and supportive university. We will help students develop as leaders both in and beyond the classroom — in civic engagement, athletics, the arts and international programs. We will give them opportunities to explore, experiment, take risks, build teams, and lead change. We will focus as well on W&M as a lifelong experience. We will build a stronger sense of stewardship among our students and our alumni. We will create and implement a new financial model to fund adequately our exceptional liberal arts university and to build a solid foundation for the future.

Our Process

The strategic planning process in 2008-2009 engaged all parts of the W&M community and produced a five-year strategic planning framework. The framework includes goals and implementation steps for addressing each challenge. We will review and update the framework annually.

Implementation will include assignment of responsibility for each goal and step, development of specific metrics to track outcomes, and reports of performance against those measures. As a result, our planning and financial processes will become more transparent and more focused on strategic priorities.

This document presents implementation steps under each challenge and goal for fiscal year 2010 (FY10) and the evolving planning framework for FY11-14. The individual(s) named in parentheses after each goal and step are responsible for coordinating and tracking implementation.

Challenge: Be a leader among **liberal arts universities**.

Goal 1: Embed the **core values of liberal arts education** in all parts of the university – undergraduate, graduate and professional. (Halleran)

FY10

- Conduct conversation about the future of liberal arts education. Include interdisciplinary and internationalization issues. Produce white paper by April 2010 to guide any subsequent curriculum reviews. (Halleran)
- Begin enrollment in new Marine Science minor. (Strikwerda, Wells)
- Complete comprehensive evaluation of Law School programs by April 2010. (Douglas)
- Establish cross-disciplinary center for Science, Technology, Engineering and Mathematics (STEM) education for K-12 teachers.* (McLaughlin)

*Continues into FY11

FY10 Metrics

- White paper completed.
- Enrollment in Marine Science minor.
- Law review completed and next steps identified.
- STEM Center established. Some external support obtained.

FY11-14 (framework for planning as funds permit)

- Review of the undergraduate curricula in A&S, Business and Education including course loads and student faculty ratios. Implement adjustments as appropriate. (Halleran, Strikwerda, Appropriate Faculty Committees)

Challenge: Be a leader among **liberal arts universities**.

Goal 2: Provide more robust support for teaching, research, scholarship, and creative activities. (Halleran)

FY10

- Conduct library needs assessment. (McCarthy, Appropriate Faculty Committees)
- Continue development of Swem Library as a central hub for collaborative activities by moving Center for Geospatial Analysis into Swem. (McCarthy)

FY10 Metrics

- Prioritized list of library needs.
- Center for Geospatial Analysis moved.

FY11-14 (framework for planning as funds permit)

- Create a fund to provide competitive startup packages for incoming faculty in all disciplines. (Halleran)
- Develop a fund to promote undergraduate research opportunities in all academic programs. (Halleran)
- Close gaps with peer programs in graduate and professional stipends. (See Challenge 4, goal 3)(Halleran, Jones).
- Increase library support as appropriate, based on the needs assessment. (McCarthy, Halleran)
- Increase funding for Scheduled Semester Research Leave (SSRL) program and reduce dependence upon adjunct replacements (Halleran)

Challenge: Be a leader among **liberal arts universities**.

Goal 3 : Support innovative models of teaching, research and academic collaboration. (Halleran)

FY10

- Begin review of merit and promotion systems and related incentives. Incorporate findings from the liberal arts conversation.* (Halleran)
- Make it a development goal to seek support for innovative, interdisciplinary, and collaborative teaching and research efforts, such as the Global Inquiry Groups (GIGs).* (Halleran)
- Reconvene the President's Advisory Committee on Internationalization in order to develop and implement a strategy for internationalization.* (Halleran)
- Provide appropriate support for the newly established Office of Community Engagement and Scholarship (OCES).* (Halleran)
- Expand internship opportunities for students.* (Ambler)
- Focus economic development efforts on specific regional target areas and technologies, and increase the numbers of students and faculty actively engaged in such projects.* (Golden, Sledge)

*Continues into FY11-14

FY10 Metrics

- Review of the merit and promotion system completed and shared.
- Development of internationalization strategy underway.
- Number of students and faculty pursuing civic-engagement opportunities identified by the OCES.
- Number of students pursuing internship opportunities.
- Numbers of students and faculty engaged in economic development projects.

FY11-14 (framework for planning as funds permit)

- Implement recommendations from the merit and promotion system review as appropriate. (Halleran)
- Create a fund for cross-disciplinary and multi-disciplinary research and teaching initiatives. (Halleran)
- Complete internationalization study and implement recommendations as appropriate. (Halleran)

Challenge: Build and support a **more fully diverse W&M community.**

Goal 1: Better coordinate and encourage W&M's diversity initiatives. Establish a senior leadership position to coordinate and encourage our diversity efforts. (Reveley)

FY10

- Establish a full-time position of Assistant to the President for Diversity and Community Initiatives. (Reveley)

FY10 Metrics

- Position established.

FY 11-14 (framework for planning as funds permit)

- Consider elevation of this position to Vice President. (Reveley)

Challenge: Build and support a **more fully diverse W&M community.**
Goal 2: Ensure a welcoming and supportive campus (Halleran, Ambler)

FY10

- Develop a web-accessible digital campus map including all American Disability Act (ADA) access points. (Martin, Golden)
- Assess programs and services that assist students with college success, and reallocate funds as needed.* (Ambler)
- Share student information across offices to better coordinate support programs. (Halleran, Ambler)
- Review benefits programs (including domestic partner benefits), services, and facilities to ensure they reflect changing demographics. (Halleran)

* Continues into FY11-14

FY10 Metrics

- Digital map on web.
- Guidelines established for reallocating funds to improve student support.
- Evidence of improvement in shared information.
- Guidelines established for any indicated shifts in benefits, programs and facilities.

FY11-14 (framework for planning as funds permit)

- Develop and implement a plan to systematically improve ADA accessibility to buildings. (Martin).
- Reallocate student support funds as appropriate. (Ambler)
- Reallocate funds for benefits, programs and facilities as appropriate. (Halleran)
- Explore the feasibility of establishing a cultural center building. (Ambler)

Challenge: Build and support a **more fully diverse W&M community**.
Goal 3: Increase the **diversity of the student body, faculty and staff** (Halleran).

FY10

- Assess feasibility of pre-collegiate programs to include students from under-represented groups. (Halleran)
- Evaluate steps to expand graduate and professional school student recruitment from under-represented groups. (Halleran)
- Evaluate alternative ways to increase the number of international undergraduate students. (Granger)
- Review diversity of faculty at other universities by academic discipline and evaluate areas where W&M representation is less diverse. Also evaluate pools of available faculty. (Halleran)

FY10 Metrics

- Decision concerning pre-collegiate programs.
- Implementation steps for graduate and professional school recruitment identified.
- Decision concerning steps to increase enrollment of international undergraduate students.
- Review of faculty diversity by academic discipline completed and issues identified.

FY11-14 (framework for planning as funds permit)

- Implement pre-collegiate programs if appropriate.
- Implement steps for graduate and professional school recruitment.
- Implement steps to expand international undergraduate students if appropriate.
- Pursue appropriate actions concerning the diversity of faculty representation.

Challenge: Build and support a **more fully diverse W&M community.**

Goal 4: Encourage diverse curricular offerings and ways of teaching (Halleran)

FY10

- Consider, as part of the liberal arts conversation under challenge 1, how our academic programs appeal to all members of the faculty and student body and the appropriate role of global perspectives, experiences and opportunities. (Halleran)
- Evaluate steps to support diversity through enhanced Swem Library collections. (McCarthy)

FY10 Metrics

- Inclusion of appeal to all members of the faculty and student body in liberal arts conversation.
- Inclusion of appropriate role of global perspectives, experiences and opportunities in liberal arts conversation.
- Steps identified to support diversity through enhanced Swem Library collections.

FY 11-14

- Consider, as part of any curriculum reviews under challenge 1, how our academic programs appeal to all members of the faculty and student body and the appropriate role of global perspectives, experiences and opportunities. (Halleran)
- Implement steps to support diversity through enhanced Swem Library collections. (McCarthy)

Challenge: Build and support a **more fully diverse W&M community.**

Goal 5: Highlight our commitment to diversity in our communications (Glover, Golden)

FY10

- Highlight diversity as one of our key communication themes.* (Golden, Glover)
- Evaluate communication channels and materials to reach under-represented audiences. (Granger, Glover)
- Expand information on the W&M website, including greater use of video, to describe more effectively the current diversity of the W&M community. (Golden, Glover)

*Continues into FY11

FY10 Metrics

- Diversity highlighted in new university “message map” of core messages.
- Identification of steps to expand reach to under-represented audiences.
- Expanded web presence to include appropriate videos.

FY 11-14

- Pursue identified channels and materials to reach under-represented audiences. (Granger, Glover)
- Continue to highlight diversity in communications. (Golden, Glover)

Challenge: Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.
Goal 1: Forge lifelong relationships with W&M. (Coordinating group – Ambler, Cottrell, Granger, Pieri)

FY10

- Appoint group to coordinate "lifetime experience" activities.* (Reveley)
- Make "W&M for a Lifetime" a central theme for Welcome Week and Convocation.* (Coordinating Group)
- Design "W&M for a Lifetime" campaign including activities that engage students, faculty, staff, alumni and the Williamsburg community. (Coordinating Group)
- Conduct inventory of all leadership boards and collect information on current activities of members. (Coordinating Group)
- Develop report describing success of athletics in building lifelong connections and share with other groups. (Driscoll)

* Continues into FY11-14

FY10 Metrics

- Coordinating group in place.
- Theme emphasized during Welcome Week and Convocation and related communications.
- Coordinating group meeting schedule and notes.
- Implementation steps for "W&M for a Lifetime" in place.
- Leadership board information consolidated.
- Report on success of athletics in building connections completed and recommendations distributed.

FY 11-14

- Implement W&M for a Lifetime campaign (Coordinating Group)
- Develop and implement a plan for increasing opportunities for members of leadership boards to provide service to W&M. (Coordinating Group)
- Examine curricular and co-curricular offerings that promote life-long connections. Increase offerings and communicate availability. (Halleran)
- Develop a campaign to encourage alumni and community involvement in campus volunteer, service, and engaged scholarship projects. (Coordinating Group)
- Find opportunities to engage the Christopher Wren Society in the campaign. (Coordinating Group)

Challenge: Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.
Goal 2: Increase collective identity. (Coordinating Group)

FY10

- Ensure the liberal arts university conversation articulates shared core values. (Halleran)
- Establish committee to work with Deans to use new facilities to energize and connect with the W&M and Greater Williamsburg communities. (Douglas, McLaughlin, Pulley, Wells)

FY10 Metrics

- Number of participants in liberal arts conversation by affiliation.
- Shared core values articulated in liberal arts conversation white paper.
- Steps identified to use new facilities to energize and engage the W&M and Greater Williamsburg communities.
- Use of campus buildings by community groups.

FY11-14 (framework for planning as funds permit)

- Establish committee re increasing student understanding and participation in governance. (Provost)
- Communicate contributions by student athletes, scholars, and creative and performing arts. (Golden)
- Implement recommendations re student participation in governance as appropriate. (Provost)
- Increase involvement of alumni and community leaders in campus activities. (Coordinating Group)
- Use the Schools of Business, Education, Law and Marine Science to energize and connect to members of the W&M and Greater Williamsburg communities (Pulley, McLaughlin, Douglas, Wells).

Challenge: Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.
Goal 3: Create a community that values **life in balance**. (Ambler)

FY10

- Identify program adjustments needed to better address students' psychological and developmental needs. (Volp)
- Develop plans to increase sport, recreation and exercise opportunities for all members of the W&M community and to enhance participation in athletics at the intramural, club, and intercollegiate levels. (Driscoll, Knight)
- Develop guidelines for adjustments in student leadership development activities. (Ambler)

FY10 Metrics

- Assessment completed with recommendations for enhancing services to meet students' psychological and developmental programs.
- Action plans prepared for increasing sport, recreation, and exercise opportunities.
- Steps identified to enhance athletic opportunities.
- Proposals presented for alternative approaches to adjusting and expanding student leadership development activities.

FY11-14 (framework for planning as funds permit)

- Expand programs to meet psychological and development needs as resources permit. (Ambler)
- Implement recommendations for expanded sport, recreation and exercise opportunities. (Ambler)
- Implement recommendations for enhanced athletic opportunities as resources permit. (Driscoll, Ambler)
- Adjust student leadership development activities as needed. (Ambler)
- Open the Cohen Career Center with expanded resources for serving students and alumni. (Ambler)

Challenge: Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.

Goal 4: Improve the **campus residential experience**. (Ambler)

FY10

- Begin construction of a 56-student residence on Richmond Road, with retail on the first floor. (Ambler, Buchanan)
- Develop plans for the addition of new residence(s) on campus with space for approximately 200 students. (Ambler, Martin, Jones)
- Develop options for enhancing the fraternity housing experience. (Ambler)
- Discuss potential housing options with Colonial Williamsburg. (Ambler, Martin, Jones)

FY10 Metrics

- Construction underway on the Richmond Road residence.
- Planning underway for the addition of new residence(s) on campus with space for approximately 200 students.
- Options for fraternity housing developed.
- Housing options with Colonial Williamsburg identified.

FY11-14 (framework for planning as funds permit)

- Finish building and occupy student residence on Richmond Road. (Ambler)
- Lease student-oriented retail space under the residence. (Buchanan)
- Build and occupy new student residence(s) on campus. (Ambler, Martin, Jones)
- Review fraternity housing options and implement changes as funds permit. (Ambler, Martin, Jones)
- Review identified Colonial Williamsburg housing options and implement as appropriate. (Ambler, Martin, Jones)

Challenge: Implement a **new financial model** that can fund our aspirations.

Goal 1: Increase revenue to sustain current excellence and support evolving priorities (Jones).

FY10

- Stimulate giving in all forms and identify resource requirements to significantly expand giving. (Pieri)
- Develop performance metrics and provide periodic reports to the President.* (Pieri)
- Initiate adjustments to increase alumni annual giving participation.* (Pieri)
- Align fund-raising priorities with the strategic plan.* (Pieri)
- Develop plans to increase research sponsored program funding. (Manos, Wells, McLaughlin)
- Expand the role of the W&M Research Institute in exploring public-private partnerships.* (Manos, Golden)
- Develop options to increase tuition, considering the student demand, our market position, competitive realities, restructuring agreements, declining levels of state support, and the availability of student financial aid. (Jones)
- Review our capacity to obtain support from Richmond and Washington. (Bradford)
- Evaluate potential to expand non-degree programs in selected areas. (Deans)

*Continues into FY11-14

FY10 Metrics

- Steps identified to significantly expand giving.
- Development performance metrics identified and reported.
- Steps taken to increase annual alumni giving.
- Alumni participation in annual giving tracked against goal of increase from 20% to 30% within five years.
- Strategic plan priorities reflected in development priorities.
- Steps identified to expand research sponsored program funding.
- Sponsored research results tracked against goal to expand by 25 percent over the next five years.
- Significant public-private research partnership developed by W&M Research Institute.
- Options for increasing revenues from tuition identified.
- Steps identified to expand capacity to obtain support from Richmond and Washington.
- Options identified for expanding non-degree programs.

FY11-14 (framework for planning as funds permit)

- Make appropriate adjustments in development resources. (Pieri)
- Implement plans to expand sponsored program funding. (Manos, Wells)
- Secure state support for alternative financial model. (Reveley, Jones, Bradford)
- Implement identified actions related to increased tuition revenues. (Jones)
- Make appropriate adjustments in efforts to obtain support from Richmond and Washington. (Bradford)
- Implement options for expanding non-degree programs as appropriate. (Deans)

Challenge: Implement a **new financial model** that can fund our aspirations.
Goal 2: Become more efficient and entrepreneurial. (Jones)

FY10

- Reconstitute the Committee for Continuous Improvement with expanded membership to identify potential savings.* (Jones)
- Identify and implement steps to encourage and reward entrepreneurial suggestions and actions.* (Jones)
- Continue to take advantage of efficiencies permitted by the 2006 Restructuring Act.* (Jones, Martin)

*Continues into FY11-14

FY10 Metrics

- Savings actions identified.
- Steps identified to expand entrepreneurial suggestions and actions.
- Efficiencies achieved under restructuring.

Challenge: Implement a **new financial model** that can fund our aspirations.

Goal 3: Increase the effectiveness and transparency of how resources are allocated. (Jones)

FY10

- Identify appropriate models/targets for determining competitiveness of faculty and staff compensation. (Halleran, Jones)
- Recommend rates at which salaries should be adjusted toward the target levels given available funds.* (Halleran, Jones, Martin)
- Identify appropriate models/targets for undergraduate and graduate/professional student financial assistance. (Halleran, Jones)
- Recommend rates for adjusting financial assistance toward the target levels given available funds.* (Halleran, Jones).
- Determine appropriate allocation of any tuition increase to increases in need-based aid.* (Halleran, Jones)
- Designate an appropriate priority for financial assistance in the development process.* (Halleran, Jones, Pieri)
- Recommend annual revisions to the strategic framework and implementation steps.* (Planning Steering Committee)
- Improve access to the sources and uses of funds, including a budget information website.* (Jones)
- Implement procedures for “sunset” reviews of significant new programs and activities.* (Jones)
- Improve interaction and communication among leadership boards supporting W&M.* (Halleran, Jones)
- Develop integrated budget presentations including all sources of funds.* (Jones)

* Continues into FY11-14

FY10 Metrics

- Selection of appropriate models/targets for faculty and staff compensation.
- Target rates at which salaries should be adjusted toward target levels approved.
- Selection of appropriate models/targets for undergraduate and graduate/professional student financial assistance.
- Target rates at which financial assistance should be adjusted toward target levels approved.
- Portion of any tuition increase going to need-based aid identified.
- Priority given to financial assistance in fund raising.
- Timely completion of PSC proposals for annual revisions.
- Amount of information provided on the budget website.
- Procedures for sunset reviews established.
- Steps to improve interaction with leadership boards identified.
- Integrated budget presentations made.

FY11-14 (framework for planning as funds permit)

- Adjust salaries and compensation to identified targets. (Halleran, Jones, Martin)
- Adjust financial assistance to identified targets. (Halleran, Jones, Martin)
- Create a pool of “seed money” for short-term investments that generate longer-term cost savings or new revenues. (Jones)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.
Goal 1: Engage, support, and retain a **workforce** appropriate to our mission. (Martin)

Complete Phase 1 of the University Human Resource System Training and Development program:

FY10

- Assess the training needs of employees (wage, classified, professional). (Martin, O’Roark)
- Develop pilot Ambassador program (training individuals to identify and pursue potential improvements). (Martin, O’Roark)
- Install a Learning Management System to support training delivery. (Martin, O’Roark)

FY10 Metrics

- Prioritized training and development needs identified.
- Pilot Ambassador program implemented.
- Learning Management System installed.

FY11-14 (framework for planning as funds permit)

- Develop a training strategic plan, validate it with stakeholders, promote the plan to the College. (Martin)
- Produce an annual training report for the College. (Martin)
- Continue to meet training needs as identified by the FY10 needs assessment. (Martin)
- Deliver additional training as identified through emerging issues facing the College. (Martin)
- Complete pilot Ambassador program, evaluate and recommend revisions to the program, expand College-wide if funds permit. (Martin)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.
Goal 1 (continued): Engage, support, and retain a **workforce** appropriate to our mission. (Martin)

Implement the compensation elements of the University HR system and Work-Life resource programs:

FY10

- Complete policies and procedures related to the University HR system. (Martin, Halleran)
- Train College community on the performance evaluation system. (Martin, O’Roark)
- Implement Work-Life program, assess elements needed. (Martin, O’Roark)

FY10 Metrics

- HR Policies and procedures completed.
- Number of individuals trained on the performance evaluation system.
- Work-Life needs identified.

FY11-14 (framework for planning as funds permit)

- HR System: Offer University System open enrollment; provide analysis of compensation and performance evaluation data to VPs and Deans; develop and communicate salary increase guidelines; identify and participate in appropriate salary surveys and benchmark jobs. (Martin)
- Work-Life Program: Compile assessment data, assess program costs and identify priorities. Deliver low-cost program elements, survey child care center expansion needs and develop proposal for childcare expansion. (Martin)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.
Goal 2 : Build a robust, dynamic **campus IT infrastructure**. (Carpenter)

FY10

- Deploy a modern, fault tolerant, network infrastructure. (Carpenter)
- Develop a Technology Integration Partnership of IT with the Charles Center to explore innovative approaches to teaching and research.* (Carpenter)
- Deploy software systems to enhance business practices.* (Carpenter)
- Develop e-portfolio system with data on faculty credentials, research and publications.* (Bosworth)
- Explore ways to improve generation of summary reports from the Banner system. (Carpenter)

*Continues into FY11-14

FY10 Metrics

- Network infrastructure deployed. Reduced breakdown rates and down time. Increase speed by a factor of 10.
- Technology Integration Partnership in place.
- Initial deployment of business practice software,
- Initial elements of faculty e-portfolio systems established.
- Implementation steps identified to improve generation of summary reports from Banner.

FY11-14 (framework for planning as funds permit)

- Phase in a comprehensive disaster recovery “hot site” to back up the main site. (Carpenter)
- Develop e-portfolio system with student research, volunteer, civic engagement and study-abroad information.* (Carpenter, Bosworth)
- Install a modern Voice over Internet Protocol (VOIP) telecommunications system. (Carpenter)
- Improve parent database in Banner and expand parental access to student financial data. (Carpenter)
- Consolidate faculty data from all schools into one authoritative data source. (Carpenter, Bosworth)
- Review needs for and gaps in high performance computing capabilities for research. (Carpenter)
- Enhance support for data-intense research by expanding high-bandwidth, high-speed temporary storage and long-term data storage. (Carpenter)
- Express Card system upgrade. (Carpenter, Henley)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.
Goal 3: Improve the condition of current facilities. (Martin)

FY10

- Initiate conversion of facilities drawings to digital formats with available funds. (Martin, Shepard and Boy)
- Develop a plan for a university-wide space inventory system to document function and use of facilities. (Martin, Shepard, Sheets)
- Seek funds to renovate Tucker Hall.* (Martin, Jones, Bradford)
- Conduct feasibility study of Tyler Hall. (Martin)
- Develop a plan to improve facility and infrastructure maintenance through preventive maintenance and replacement. (Martin, Shepard)
- Form a working group, including faculty, IT, Registrar and Administration to develop an integrated classroom management plan. (Martin, Shepard, Marchello, Roche)

*Continues into FY11-14

FY10 Metrics

- Begin conversion of facilities drawings to digital formats in progress.
- Completed space inventory management plan.
- Completed preventive maintenance plan.
- Completed feasibility study of Tyler Hall.
- Identified priorities for classroom management.

FY11-14 (framework for planning as funds permit)

- Implement a collaboration model that includes building occupants in maintenance decisions. (Martin)
- Develop guidelines for the life-cycle replacement of furniture and equipment. (Martin, Shepard)
- Implement space management inventory; and hire manager as funds permit. (Martin)
- Establish funding needs based on CPV standards; Implement preventive maintenance program; Hire a facility maintenance planner and a utility planner and increase facility maintenance expenditures following the plan. (Martin)
- Renovate Tucker Hall. (Martin)
- Establish requirements for a furniture replacement program. Hire a manager and implement as funds permit. (Martin)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.

Goal 4: Provide the buildings, classrooms, laboratories and other **learning spaces** needed by a 21st Century university.
(Martin, Halleran)

FY10

- As an initial step in Master Planning, conduct a study of learning spaces for the 21st century to develop an integrated vision for collaborative teaching, learning and research. (Halleran, Martin)
- Initiate design of the third phase of the Integrated Science Center. (Martin, Strikwerda, Manos)
- Initiate review of the Arts Complex pre-planning study. (Martin, Halleran, Strikwerda, DeGroft)

FY10 Metrics

- Initial recommendations for collaborative teaching, learning and research space needs as a basis for continued master planning.
- ISC design underway.
- Arts Complex study underway.

FY11-14 (framework for planning as funds permit)

- List and assess all existing instructional spaces and prioritize repair and upgrade requirements. Hire classroom manager and implement plan as funds permit. (Martin)
- Identify gaps with vision and propose prioritized plan for additional spaces. Integrate vision and plan into Facilities and Infrastructure Master Plan. (Martin)
- Initiate development of comprehensive Facilities and Infrastructure Master Plan with consultant help. (Martin)
- Finalize Master Plan, including recommended new facilities and sites, renovations, and infrastructure improvements. (Martin)
- Identify requirements for new technology center identified; update capital project request for center
- Establish, fund and empower a space planning function to manage space utilization. (Halleran, Martin)
- Execute moves and modify facilities identified in the space utilization plan as funds permit. (Halleran, Martin)
- Complete design of the third phase of the Integrated Science Center and seek funding. (Martin, Strikwerda)
- Complete review of the Arts Complex pre-planning study; Initiate design of the first phase of the Arts Complex, if sufficient private funds are available. (Martin, Halleran, DeGroft, Strikwerda)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.

Goal 5: Provide a safe and secure environment.

FY10

- Improve wireless coverage by installing additional cell towers. (Martin, Carpenter)
- Complete risk management assessment policies and procedures and roll-out on campus.* (Martin, Risk Mgmt Cmte)
- Continue to monitor regulatory requirements and best practices to ensure policies protect College assets.* (Martin)
- Provide regular campus-wide security training.* (Martin)
- Complete policies and procedures for Campus Assessment and intervention Team (CAIT). (Martin)

*Continues into FY11-14

FY10 Metrics

- Cell towers installed.
- Risk management policies and procedures in place.
- Steps identified to meet evolving regulatory requirements.
- Campus-wide security training conducted.
- CAIT policies completed

FY11-14 (framework for planning as funds permit)

- Establish full time emergency preparedness function. (Martin)
- Roll-out education and prevention of violence program. (Martin)
- Establish full-time Risk Management function. (Martin)
- Fund additional safety officer for monitoring and proper management of hazardous materials. (Martin)
- Increase campus policing and security capability as funding permits. (Martin)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.
Goal 6: Enhance the **appearance** of the College. (Martin)

FY10

- Develop automated planning documentation for custodial operations using Association of Physical Plant Administrators (APPA) standards.* (Martin, Shepard)
- Develop exterior maintenance standards for all facilities. (Martin, Shepard)
- Develop database of exterior maintenance tasks. (Martin, Shepard)

*Continues into FY11-14

FY10 Metrics

- Automated planning documentation for custodial operations underway.
- Exterior maintenance standards defined.
- Database of exterior maintenance tasks completed.

FY11-14 (framework for planning as funds permit)

- Determine total staffing requirements for custodial operations required to reach APPA Level 2 of building cleanliness; determine additional staffing and funding requirements; phase in as funding permits. (Martin)
- Phase in exterior maintenance plan as funds permit. (Martin)
- Develop a comprehensive, sustainable landscape master plan. (Martin)

Challenge: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.

Goal 7: Improve sustainable operations. (Martin)

FY10

- Develop e-handbooks on sustainable goals and practices. (Committee on Sustainability -- COS)
- Continue sustainability fellowships to support sustainability programs. (COS)
- Gather data and initiate planning to reduce and control nutrients and pollutants. (COS)
- Identify and map (GIS) critical habitat and sensitive ecological assets. (COS)
- Develop sustainable land-use principles and practices to aid in developing a comprehensive landscape plan. (Martin, COS)
- Gather data for storm-water management planning at the College and VIMS. (Martin, COS)
- Implement the Eco-Ambassador Program to connect staff and students to identify opportunities and spread best practices.* (COS)
- Promote water conservation in campus buildings and implement best management practices.* (Martin, COS)
- Provide training and education on sustainable practices to existing and new personnel. (COS)
- Develop plans for phased renovation to achieve energy efficiencies and reduce waste streams. (Martin, COS)
- Develop plans for phased implementation of a comprehensive campus recycling plan. (Martin, COS)

*Continues into FY11-14

FY10 Metrics

- E-handbooks developed.
- Sustainability fellowship continues.
- Planning steps in place to reduce and control nutrients and pollutants.
- Digital GIS map in place including critical habitats and sensitive ecological assets.
- Land use principles and practices identified.
- Storm-water management planning data collected.
- Eco-Ambassador program in place.
- Water conservation improved.
- Training on sustainable practices in place.
- Next steps identified for phased renovation to increase energy efficiency and reduce waste.
- Plan for phased implementation of recycling plan in place.

FY11-14 (framework for planning as funds permit)

- Phase in implementation of a land use plan to improve carbon sink potentials in developed areas. (Martin)
- Develop a transportation plan that reduces the carbon footprint and energy use. (Martin, COS)
- Develop plan to reduce impermeable surfaces and create permeable surfaces. Phase in implementation. (Martin)
- Incorporate and promote sustainable land use practices in the College Master Plan. (Martin)
- Update the Stormwater Management Plan and phase in improvements. (Martin)
- Establish targets for carbon and greenhouse gas reduction (Shepard, COS)

Challenge: Explain and promote W&M through a more effective **communications structure and strategy**.

Goal 1: Distill and promote a **common identity**. (Golden)

FY10

- Complete roll-out of the revised website, bringing units on line with common W&M format. (Evans)
- Identify and stress major communications themes consistent with the strategic plan. (Golden)
- Recommend specific roles for university leadership to promote the major communication themes. (Golden)
- Select a new mascot for W&M. (Driscoll, Reveley)

FY10 Metrics

- All W&M websites on common format.
- Internal message map of major themes completed and implemented.
- Annual university communications plan in place with clear implementation responsibilities.
- Mascot selected.

FY11-14 (framework for planning as funds permit)

- Complete an inventory of iconic images, logos and other visual representations of W&M. (Golden)
- Recommend a guide to university style and standards. (Golden)
- Approve the university-wide visual identity. (Reveley)
- Recommend a systematic marketing research program as an on-going element of communications. (Golden)
- Implement the marketing research program as funds permit. (Golden)

Challenge: Explain and promote W&M through a more effective **communications structure and strategy**.
Goal 2: Enhance W&M's position among the nation's leading universities. (Golden)

FY10

- Evaluate steps to assist units in publicity efforts and provide a report. (Golden)
- Implement steps to increase coverage of research, scholarship and creative activities in targeted media.* (Golden)
- Develop a plan to highlight exceptional W&M achievers in all fields for both internal and external audiences. (Golden)

*Continues into FY11-14

FY10 Metrics

- Report for increasing publicity efforts completed and implementation steps identified.
- Coverage of research, scholarship and creative activities in targeted media increased.
- Implementation steps identified to highlight W&M achievers in all fields.

FY11-14 (framework for planning as funds permit)

- Increase coverage of research, scholarship and creative activities in targeted media by 50% over five years. (Golden)
- Complete and promote a university-wide faculty "experts" list. (Golden)
- Construct a web-based inventory of academic research. (Golden, Evans)

Challenge: Explain and promote W&M through a more effective **communications structure and strategy**.
Goal 3: Develop an **integrated, appropriate communications** capability. (Golden)

FY10

- Complete a comprehensive review of communications and marketing at W&M by February 2010. (Golden)

FY10 Metrics

- Review completed.
- Internal message map with major themes and proof points completed.
- Annual President's communication plan and process in place.
- Annual W&M communication plan and process in place.
- Steps identified to coordinate creative services.
- University Relations review completed and steps identified to enhance coordination with units.

FY11-14 (framework for planning as funds permit)

- Continue implementation of the recommendations from the communications review. (Golden)