



CELEBRATING TRADITION & FORGING CHANGE:

AN EVOLVING PLAN FOR WILLIAM & MARY

Overview: April 2011

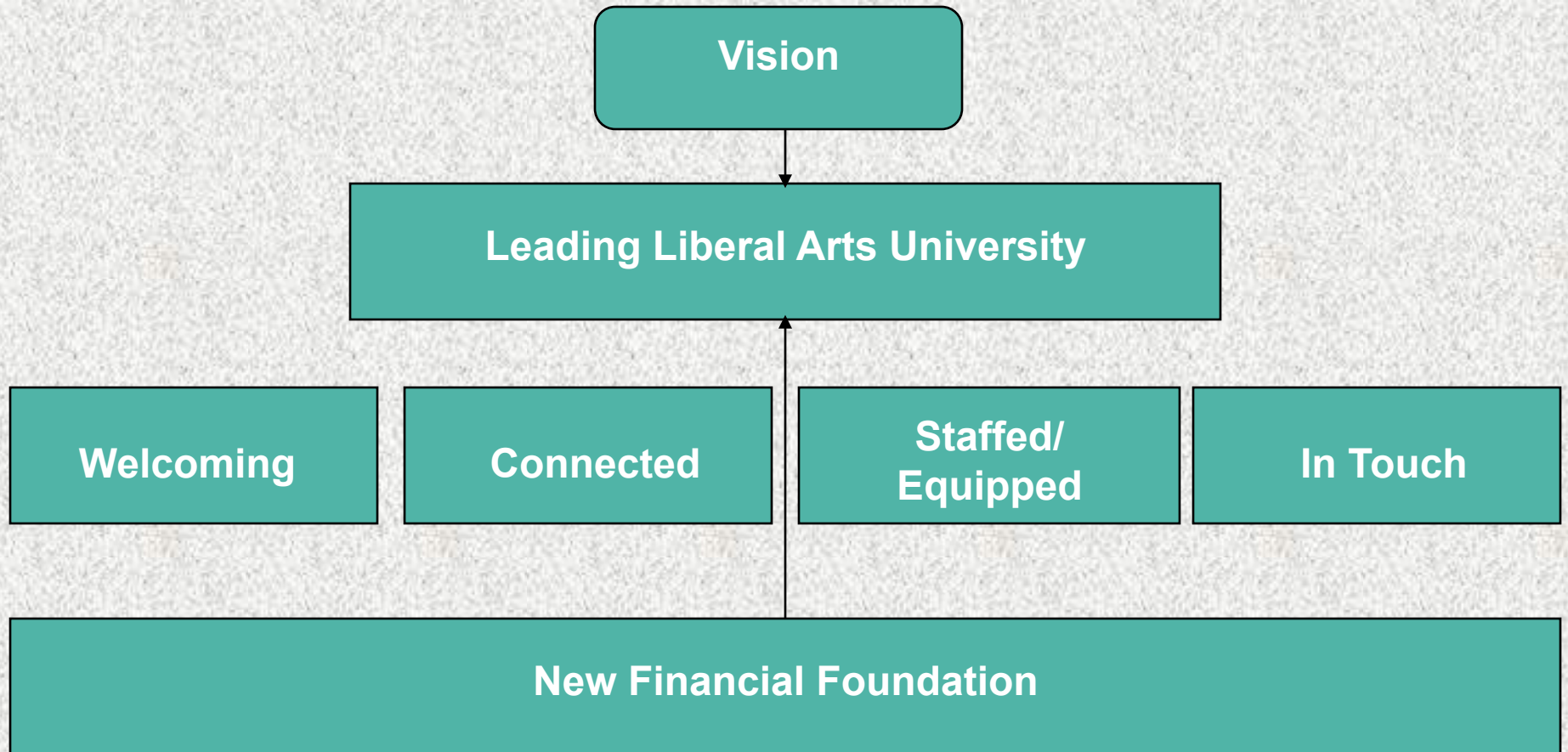
Our Vision in the centerpiece of our strategic plans.

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.

W&M Strategic Framework



Our Evolving Plan

- 2008-2009 – Launched a new strategic planning process. Agreed on our vision. Identified challenges/opportunities.
- 2009-2010 – Implemented initial steps in each challenge area. Emphasized the liberal arts conversation, communication and lifelong connections.
- 2010-2011 – Emphasized planning for the undergraduate curriculum review, linking strategic planning and budgeting, progress on the new financial model and business innovation.
- **2011-2012** – Undergraduate curriculum review, faculty and student outreach to alumni, design student residence on campus, visual identity, continue implementation of the new financial model – strategic investment in development, innovation and greater efficiency.

Our Overarching Grand Challenge

- Change lives for the better by being a university of **compelling academic distinction, one of the world's great liberal arts universities.**
- 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. That is our great competitive advantage.
- Our special strength is **engaged learning.**

Be a leader among liberal arts universities

Year	Major Steps
2009-2010	Leading Liberal Arts University – Conversation. White Paper to Guide Curriculum Review. STEM initiative. Launched marine science minor. Center for geospatial analysis moved to SWEM. Launch Law Curriculum Review.
2010-2011	Launch Undergraduate Curriculum Review. Complete Law Curriculum Review.
2011-2012	Complete Undergraduate Curriculum Review. Provide budget managers additional flexibility to address salary equity issues. Funds for Undergraduate and Graduate Financial Aid and STEM Related Research.

Our Major Immediate Challenge: Implement a New Financial Model

- As a “one of a kind” public ivy, William & Mary no longer has the financial resources to maintain our current excellence, much less move in the directions charted by our strategic plan.
- **This century will belong to the schools that either already have or can build sustainable financial foundations. We need to build ours.**
- Over the last generation, taxpayer support for William & Mary has declined from 43% of our operating budget to 14% this fiscal year and less next fiscal year.
- This trend is not likely to reverse, given the enormous demands on state revenue going forward and Virginia’s practice of low taxation.

Four Pillars of the New Financial Model

We intend to build a financial foundation resting on four pillars:

- (1) A residuum of **taxpayer support**, especially for capital projects;
- (2) Growing streams of **earned income** (tuition and fees, research grants and contracts, and entrepreneurial leveraging of our strengths to generate new sources of revenue);
- (3) Greatly enhanced **philanthropy** (annual giving, endowment, funds for bricks and mortar); and
- (4) Internal **innovation** and even greater efficiency.

These four pillars are interdependent. If we fail to build any one of them, the capacity of the other three pillars to support the foundation will be severely impaired.

Implement a new financial model that can fund our aspirations.

Year	Major Steps
2009-2010	Greater emphasis on annual giving. Communications groundwork for new model.
2010-2011	Four pillars communication. Launch campus-wide business innovation initiative. Plan for potential campaign when timing is right. Increase faculty engaged in economic development projects.
2011-2012	Balance the budget in response to the loss of federal stimulus funds and the decline in state operating funds. Continue emphasis on annual giving. Strategic investment in development operations. Ensure alignment of fund raising efforts with strategic priorities. Implement innovation and greater efficiency projects. Seek funding for athletic scholarships so that as tuition rises the College can maintain programs without pressure on other sources. Implement Top Jobs 21 legislation requirements – 6-year plan.

Innovation and Greater Efficiency

www.wm.edu/innovation

Announced in October 2010, Organizational Teams, Projects in March 2011

Focused first on business processes.

Report to the President in March:

1. Noted W&M is already very efficient. Recorded innovations. Shared ideas across campus.

2. Identified changes at the university level that will complement and enhance unit level plans.

3. Developed plans for even greater efficiency (cutting costs, better results at the same cost, avoiding future costs) and generating new revenue in each major campus organization.

1. W&M is already very efficient. Communicate innovations. Share ideas across campus.

- *U.S. News and World Report* rankings for 2010: 31st (tie) best national university in the country with resources that rank much lower at 85th. Wide disparity between outcomes and resources.
- *Kiplinger's* February 2011 edition ranks W&M the fourth-best bargain among public universities.
- W&M has an extraordinarily high graduation rate (91 percent), so the cost per degree (4 years) is actually among the lowest of 14 public universities in the Commonwealth.
- 2008-2010 – Main Campus base operations cut \$8.1 million, VIMS cut \$6.1 million, from the baseline projection. Total W&M baseline cut \$14.2 million.
- *William & Mary at Work Examples* document includes 40 summaries of how organizations responded in last two years: problem, change, impact.

2. Identify changes at the university level that will complement and enhance unit level plans.

Discussions with all VPs, Deans, and 14 organizational level teams.

Identified 17 university-level projects – prioritized by importance, complexity, resources required. Selected 8 for phase I. They are underway.

- Improve Information Technology Coordination.
- Exploit Opportunities for Expanded Finance and Grants Offices Coordination.
- Streamline Faculty and Staff Recruitment Processes.
- Standardize Calendar and Events Coordination.
- Reduce Costs of Computer Leasing.
- Place Policies, Procedures and Forms on One Web Site.
- Investigate Summer Use of Facilities and Expand Net Revenues from Programs.
- Seek Changes in Fees Paid to the State's eVA Electronic Procurement System.

3. Develop and implement plans for even greater efficiency in each major campus organization.

Organizational teams proposed 55 projects – team leader, team members, timeline, scope, expected outcomes. Many underway. Some examples:

- Admin Copier and printer review
- Alumni Homecoming events
- Arts & Sciences Summer school revenue
- Athletics Consolidate travel administration
- Business Add Army MBA without 3 staff positions
- Education Market professional development center
- Finance Cash flow management
- IT Consolidate business functions
- Law Special ed. law/advocacy certificate program
- Provost Reorganize sponsored research execution
- Strategic Initiatives Expand revenue from business incubator
- Student Affairs Pharmacy expansion
- Swem Library Student employee coordination
- Univ. Development Streamlined annual giving solicitation
- VIMS Vessel management and operations

Academic Initiatives

Charge to Deans in October – Report to President in May

Some initiatives:

- Expand undergraduate enrollment by 200 over the next 4-5 years.
- Review size of summer academic programs.
- New Army logistics MBA program – 20 officers this summer.
- New Law special education and advocacy certificate program.
- New international programs – China, India, St. Andrews.

Other Critical Challenges

The planning process targets four 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.
- 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.

Build and support a more fully diverse W&M community

Year	Major Steps
2009-2010	Created position of Assistant to the President for Diversity and Community Initiatives from existing positions. Launched the Lemon Project. Expanded website coverage of diversity.
2010-2011	Chon Glover review of best practices. Several website improvements – One Tribe, many voices; diversity portal; year in review.
2011-2012	Implement steps from the review. Research the appropriateness/practicality of pipeline programs that contribute to diversity. Develop a plan for institutional professional development focused on creating a diverse and inclusive campus community.

Review of Best Practices – Chon Glover

- Overview of Spring Diversity Review
- Examples of Internal Current Practice
- Examples of External Best Practice
- Next Steps

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

Year	Major Steps
2009-2010	VP-level and student coordinating committee. Emphasis on lifelong commitment in key events – Welcome Week, Convocation, Coronation Day. Break ground on Tribe Square.
2010-2011	Leverage Career Center opening. Expand student involvement in Charter Day. Construct Tribe Square. Planning for new student residence on campus
2011-2012	Design new student residence on campus. Engage alumni with the Cohen Center. Expand opportunities for faculty and student presentations to alumni chapters. Review orientation programming, particularly in graduate programs, to build lifelong ties. Develop measures and targets for opportunities in varsity sports, club teams, intramurals, and personal fitness at all levels.

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

Year	Major Steps
2009-2010	IT Upgrades. Sustainability Initiatives – fellow; “do one thing” campaign; eco-village proposal. School of Business opens.
2010-2011	School of Education opens. Career Center opens. Expand Recycling. Investment fund for efficiency initiatives. Complete risk management policies and begin assessments.
2011-2012	Free up M&O (Operations) funds through innovation and efficiency initiatives. Deploy software systems to enhance business practices. Complete 5 department/school/office risk assessments. Initiate design of ISC3. Establish facilities condition index for all campus buildings.

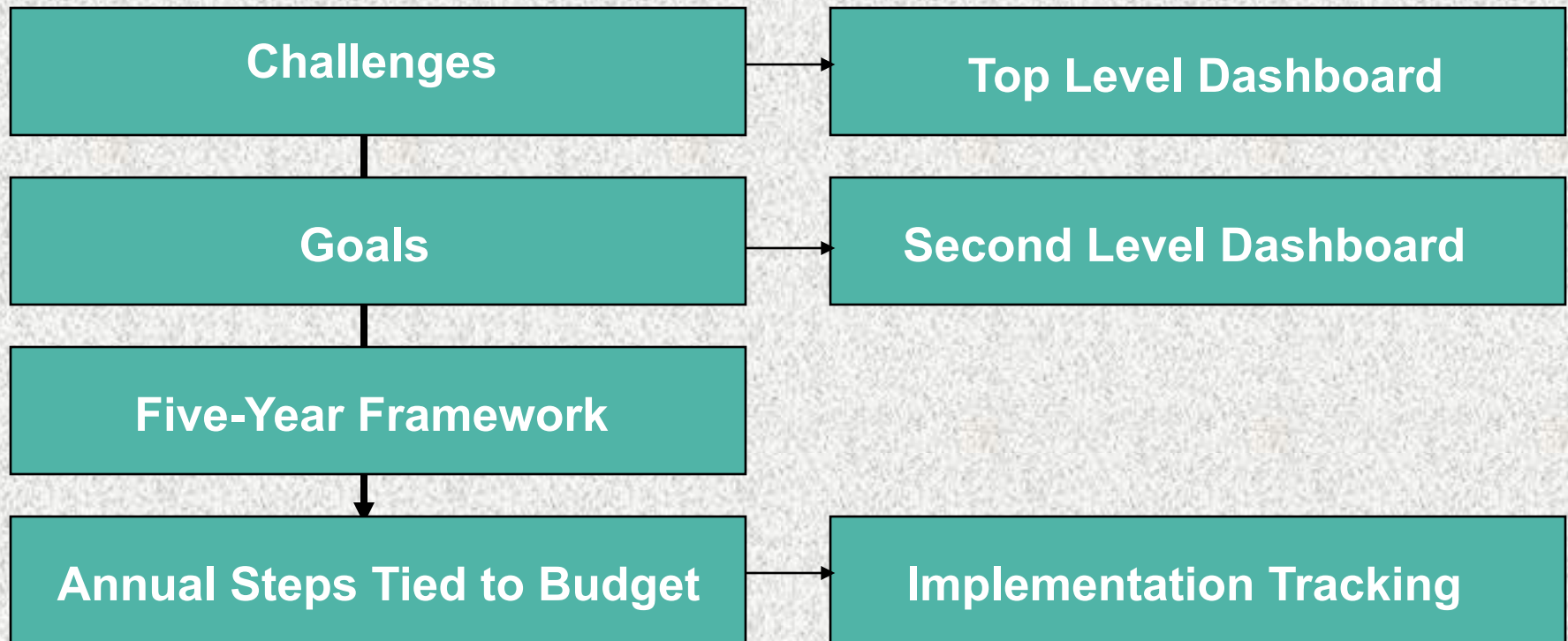
Explain and promote W&M through an effective communications structure and strategy.

Year	Major Steps
2009-2010	Complete Website Rollout. Comprehensive Review of Communications. Merge Publications and IT Web Team into Creative Services. New Mascot.
2010-2011	Launch visual identity project. Expand coverage in targeted national media. Expand faculty experts list for media. Communications training program and liaison system for University Relations with units. Ideation Website.
2011-2012	Begin implementation of visual identity recommendations. Continue expansion of coverage in targeted media. Continue expansion of faculty experts media list. Expand communications training programs.

W&M Annual Planning Model

Process

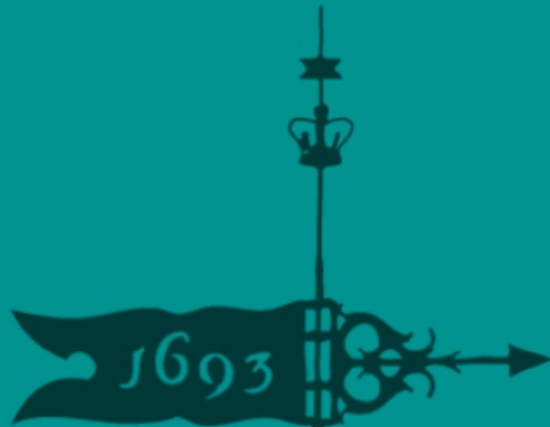
Assessment



Status of Implementation Steps

Implementation includes assignment of responsibility for each goal and implementation step, and periodic reports to track progress.

Year Initiated	Underway	Not Started or Deferred	Completed or Continuing	Total Planned
2009-2010	17	10	78	105
2010-2011	33	12	31	77
2011-2012				79



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