



Celebrating Tradition & Forging Change

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# Strategic Initiatives

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February 2012



## Vision Review Underway

- BOV interest in greater aspiration in the vision.
- Broad resonance with that across campus.
- Discussions with VPs, Deans, Planning Steering Committee.
- Developing new wording that is more aspirational.
- Will be ready to discuss with the BOV in April.



# W&M Strategic Framework – Highlights of the Emerging 2013-2017 Plan



Vision



Leading Liberal Arts University

Welcoming

Connected  
for a Lifetime

Staffed/  
Equipped

In Touch



New Financial Foundation



## Challenge 1



Vision



### 1. Leading Liberal Arts University

FY13

- Begin implementation of recommendations from undergraduate curriculum review.
- Complete review of faculty merit and reward system.
- Expand summer study and research opportunities.
- Explore Center for Collaborative Teaching and Research.
- Expand and integrate Reves Center programs.
- Fund salaries, graduate stipends, start-up packages.



## Challenges 2, 3, 5, 6

### 2. Welcoming



### 3. Connected for a Lifetime



### 5. Staffed/ Equipped



### 6. In Touch



- Implement diversity action plans submitted by Deans in FY12.
- Actively promote Cohen Center services to alumni.
- Enhance alumni chapter engagement through increased partnership with the development office.
- Measure alumni engagement to enhance cultivation strategies.
- With the Real Estate Foundation, explore options for additional 200+ beds near campus (in addition to the fraternity housing project).
- Continue to deploy software systems to enhance business practices.



## Challenge 4

### 4. New Financial Foundation = Public Funding + Earned Income + Philanthropy + Innovation

- Continue emphasis on annual giving.
- Implement planned strategic investment in development operations.
- Provide a \$200,000 per year Creative Adaptation Fund for three years beginning in FY13.
- Reallocate costs or increase net revenues cumulatively by five percent in each school over the next three years (FY13-15).
- Continue implementation of innovation and greater efficiency projects, add new projects, and report annual results – [www.wm.edu/innovation](http://www.wm.edu/innovation).
- Start implementation of 6-year plan including adjustments for actions taken by the General Assembly and Governor this spring.

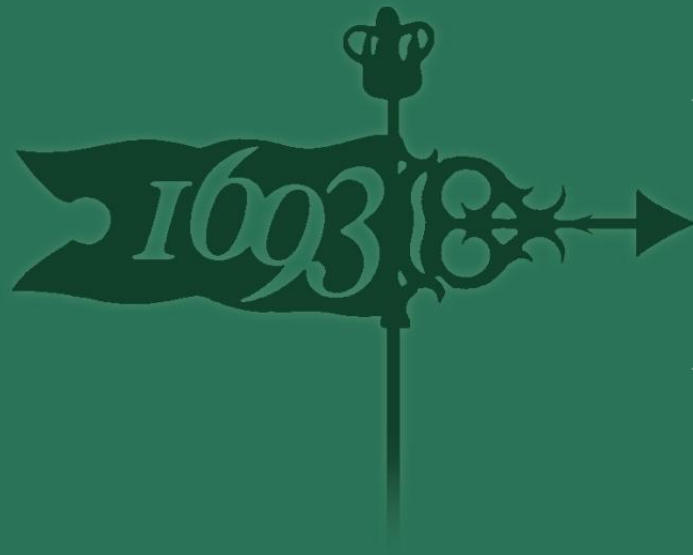


# Macro Strategic Innovation

## Discussion

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# Strategic Initiatives

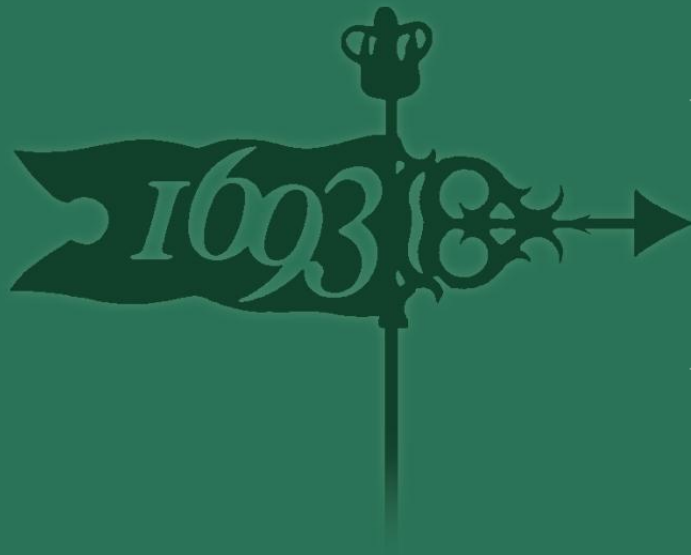
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# Reference Materials

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February 2011

**WILLIAM & MARY TOP LEVEL DASHBOARD**

Measures+	W&M 2007-08	W&M 2008-09	W&M 2009-10	W&M 2010-11	W&M 2011-12	Target	UVA* **	Brown* **
<b>Challenge 1 – Leading Liberal Arts University</b>								
1. Undergraduate acceptance rate <sup>a</sup>	34%	34%	34%	32%	35%	34%	33% (2010-11)	9% (2010-11)
2. Undergraduate yield rate <sup>a</sup>	37%	35%	34%	35%	33%	34%	45% (2010-11)	53% (2010-11)
3. Undergraduate 25 <sup>th</sup> – 75 <sup>th</sup> percentile SAT score range <sup>b1</sup>	1250-1450	1250-1440	1240-1450	1260-1440	1240-1450	1250-1450	1220-1450 (2010-11)	1330-1530 (2010-11)
4. Undergraduate graduation rates <sup>a</sup>	91%	91%	90%	Avail. 5/2012	Avail. 5/2013	93%	93% (2009-10)	96% (2009-10)
5. Student: faculty ratio <sup>b8</sup>	11:1	11:1	12:1	12:1	Avail. 5/2012	<13:1	16:1 (2010-11)	9:1 (2010-11)
6. Undergraduate small class percentage (2-19 students) <sup>b</sup>	49%	45%	48%	47%	Avail. 5/2012	50%	52% (2010-11)	68% (2010-11)
<b>Challenge 2 – Diversity</b>								
7. Undergraduates who are members of historically underrepresented groups <sup>a9</sup>	20%	22%	23%	25%	26%		26% (Fall 2010)	33% (Fall 2011)
8. Undergraduates who are nonresident aliens <sup>a</sup>	1%	2%	2%	3%	3%		6% (Fall 2010)	10% (Fall 2010)
9. Graduate/professional students who are members of historically underrepresented groups <sup>a9</sup>	13%	13%	13%	14%	15%		16% (2010-11)	21% (2010-11)
10. Graduates who are nonresident aliens <sup>a</sup>	8%	10%	12%	11%	12%		11% (Fall 2010)	27% (Fall 2010)
11. Average per-borrower cumulative undergraduate debt <sup>c3</sup>	\$15,602	\$16,765	\$21,367	Avail. 2/2012	Avail. 2/2013	<\$20,000	\$19,939 (2009-10)	\$22,468 (2009-10)
<b>Challenge 3 – Lifelong Connection</b>								
12. Alumni giving participation rate: undergraduates with degrees <sup>d</sup>	21.9%	22.4%	23.4%	Avail. 9/2012	Avail. 9/2013	30% by 2014	22% (USNews)	34.4% (2009-10)
<b>Challenge 4 – Business Plan</b>								
13. US News & World Report: Financial resources rank <sup>b</sup>	111	88	85	97	Avail. 9/2012	<70	60 (2010-11)	26 (2010-11)
14. Total sponsored program expenditures (millions) <sup>a</sup>	\$50	\$50	\$54	Avail. 4/2012	Avail. 4/2013	\$60 by 2014	\$344 (2009-10)	\$113 (2009-10)
15. Debt Service as Percent of Operating Expense <sup>f</sup>	4.2%	4.6%	4.1%	Avail. 9/2012	Avail. 9/2013	<7%	Not available	Not available
16. Annual Total Value of Private Gifts (in millions) <sup>d6</sup>	\$35	\$51	\$43	Avail. 9/2012	Avail. 9/2013	50	\$196 (2009-10)	\$167 (2009-10)
<b>Challenge 5 – Administrative Resources and Infrastructure</b>								
17. All E&G Facilities Condition Index <sup>e5</sup>	12.4%	11.0%	7.6%	7.8%	6.3%	<10%	8.7% (2010-11)	Not available
<b>Challenge 6 – Communications</b>								
18. US News & World Report: National Universities <sup>b</sup>	32	33	31 (tie)	33 (tie)	Avail. 9/2012		25 (tie) (2010-11)	15 (tie) (2010-11)
19. US News & World Report: Public Universities <sup>b</sup>	6	6	6	6	Avail. 9/2012		2 (tie) (2010-11)	Not applicable

+Preliminary list. A measure of the quality of faculty is under discussion.

\*Years vary by data availability as noted in W&M data

\*\*Denotes schools with a medical school and engineering program

<sup>a</sup> From Integrated Postsecondary Education Data System of US Dept. of Education Nat'l Center for Education Statistics (data for required reports could vary among schools by one year for some measures)

<sup>b</sup> From US News & World Report: rankings published in August based on data submitted in previous spring

<sup>c</sup> From Common Data Set (or institutional website, as available)

<sup>d</sup> From Council for Aid to Education/Voluntary Support of Education

<sup>e</sup> Calculated by facilities management for submission to State Council of Higher Education

<sup>f</sup> Internal calculation using data included in the College's annual audited financial statements

<sup>g</sup> From National Association of College and University Business Officers (NACUBO)

<sup>1</sup> Calculated by adding the 25<sup>th</sup> and 75<sup>th</sup> percentiles for Critical Reading and the percentiles for Math.

<sup>2</sup> Figures are estimates for current year or actual for previous year

<sup>3</sup> Average cumulative principal borrowed by undergraduate borrowers who started as freshmen at the institution and who had earned bachelor's in year previous to when IPEDS report was submitted

<sup>4</sup> Includes W&M and VIMS operating and non-operating expenditures; excludes independent operations, auxiliary and hospital services expenditures. Operating expenditures include instruction, research, public service, academic support, student services, institutional support, operation/maintenance of plant. FTE count includes both graduate and undergraduate students and is based on Fall Headcount (similar to NACUBO).

<sup>5</sup> The Facilities Condition Index (FCI) is a fitness indicator for the College's facilities and infrastructure. The FCI is the ratio of known maintenance deficiencies to the current replacement value of academic facilities. Industry standards suggest that an FCI of 5% or less indicates good condition, 5% to 10% fair condition, and above 10% poor condition. "All E&G Facilities" are those facilities supported by general funds allocated by the Commonwealth. These facilities include "major" E&G facilities (classrooms, class lab facilities, Wren Building, Admissions, Blow Memorial Hall, Cohen Career Center) and "minor" E&G facilities (e.g., Jamestown Road Houses, Galt Houses, Quonset Huts, physical plant-related facilities). E&G facilities do not have a revenue generating component and exclude facilities that are self-supporting such as dormitories, athletic facilities, food service facilities.

<sup>6</sup> Annual rate based on Council for Aid to Education/ Voluntary Support of Education. For UVa, 2-year average from US News & World Report is used

<sup>7</sup> Also includes race reported as unknown and non-resident alien

<sup>8</sup> Does not include faculty or students in stand-alone graduate or professional programs (i.e., Law and, prior to 2010, VIMS)

<sup>9</sup> Underrepresented groups include American Indian or Alaska Native, Asian/Native Hawaiian/ Other Pacific Islander, Black or African American, Hispanic or Latino, Two or more races. Underrepresented groups do not include White, Unknown, Nonresident aliens.



## Implementation Steps as of February 2012

Year Initiated	Not Yet Started	Underway	Completed	Into Continuing Practice	Total	Percent Complete Or Into Practice
2009-2010	0	8	49	39	96	92%
2010-2011	0	10	24	29	63	84%
2011-2012	14	35	10	19	78	37%
Total	14	53	87	87	237	72%



## Strategic Challenges/Opportunities

1. Be a leader among liberal arts universities.
  - Embed the core values of liberal arts education in all parts of the university - undergraduate, graduate and professional.
  - Provide more robust support for teaching, research, scholarship, and creative activities.
2. Support a more fully diverse W&M community.
  - Communicate W&M's commitment to diversity.
  - Ensure a welcoming and supportive campus.
  - Increase the diversity of the student body, faculty and staff.
  - Provide more diverse curricular offerings.



## Strategic Challenges/Opportunities

3. Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M.
  - Forge lifelong relationships with W&M.
  - Create a community that values life in balance.
  - Improve the campus residential experience.
  
4. Develop and implement a business plan that maximizes revenue sources and ensures transparent resource allocation in support of College priorities and needs.
  - Increase revenue and allocate resources consistent with institutional needs and priorities.
  - Enhance efficiency and effectiveness of operations and identify opportunities for revenue generation or cost savings across the institution. Improve transparency of College revenue and expenditures across all sources and types of expenditures.



## Strategic Challenges/Opportunities

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

- Engage, support, and retain a highly regarded workforce.
- Provide robust and dynamic infrastructure for campus-wide IT system needs to support the academic program and administrative functions.
- Ensure that the College has the type and quality of facilities needed to explore, teach and learn in the 21st century and which present the College in a competitive light for prospective faculty, students and staff.
- Provide a safe and secure environment.
- Become a model of sustainable operations.

6. Explain and promote W&M through a more effective communications structure and strategy.

- Distill and promote a common identity.
- Enhance W&M's position as one of the nation's leading universities.
- Develop an integrated, appropriate communications capability.