



Celebrating Tradition & Forging Change

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# William & Mary Board of Visitors

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September 2011



## 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.





# W&M Strategic Framework



Vision



1. Leading Liberal Arts University

2. Welcoming



3. Connected  
for a Lifetime



5. Staffed/  
Equipped



6. In Touch



4. New Financial Foundation



## BOV Subcommittee Membership

- |    |   |                 |
|----|---|-----------------|
| 1. | Liberal Arts University (Gene Tracy) -- | Colin Campbell  |
| 2. | Diversity (Chon Glover) --              | Dennis Liberson |
| 3. | Connection (Karen Cottrell) --          | Laura Flippin   |
| 4. | Financial Model (Sam Jones) --          | Timothy Dunn    |
| 5. | Infrastructure (Anna Martin) --         | Charles Banks   |
| 6. | Communication (Ginnie McLaughlin) --    | Peter Snyder    |





2011-2012



Vision



## 1. Leading Liberal Arts University

- Complete Undergraduate Curriculum Review.
- Funds for Undergraduate and Graduate Financial Aid and STEM Related Research.
- Other Actions: Launch Joint Program with St. Andrews; Establish Confucius Institute; Implement Mellon Project – Post Doc Teaching



2011-2012

2. Welcoming

3. Connected  
for a Lifetime

5. Staffed/  
Equipped

6. In Touch

- Design new student residence on campus. Initiate design of ISC3.
- Engage alumni with the Cohen Center.
- Deploy software systems to enhance business practices.
- Establish facilities condition index for all campus buildings.
- Begin implementation of visual identity recommendations.
- Expand faculty experts media list and coverage in targeted media.



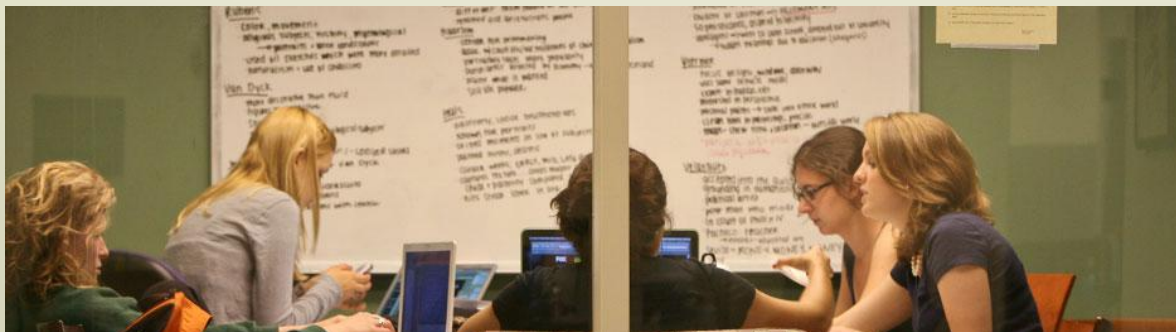


2011-2012

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

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- 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 – [www.wm.edu/innovation](http://www.wm.edu/innovation)
- Start implementation of 6-year plan.
- Seek greater flexibility in setting in-state tuition.





## Innovation and Greater Efficiency

- In October 2010, President Reveley launched the project as part of the four-pillar approach outlined in the strategic plan.
- Initial reports on business process innovation (March) and academic innovation (June).
- Over 60 innovation projects have been identified and over 40 of those are already underway. Most are scheduled for completion in 2012, and a few extend into 2013.

Definitions:	Number of Projects				
	Not Begun	Started	Finished	Total	
(N) = Not begun	0	9	0	9	University Projects
(S) = Started	19	32	3	54	Organizational Projects
(F) = Finished	19	41	3	63	All projects

- We continue to add new projects. Further initiatives on both the business and academic sides are essential.





## Selected Projects

These 8 projects alone when fully implemented would provide over \$2 million per year (additional net revenue or cost savings shown in parentheses).

- Fully implement the St. Andrews-W&M joint degree program (\$400K)
- Implement new Armed Services MBA (\$400K)
- Adjust business school teaching loads based on research productivity (\$300K)
- Reorganize sponsored research project execution and financial management to expand indirect recovery funds (\$400K)
- Reduce the costs of equipment leasing (\$180K)
- Deploy a modern voice over IP communications system (\$100K)
- Consolidate business functions in IT (\$100K)
- Integrate and streamline annual giving direct solicitation (\$90K)
- Improve VIMS vessel management and operations (\$60K)



## Goals

- When fully implemented, the over 60 projects already envisaged should generate over \$2.5 million per year in cost savings or additional net revenues.
- Some of the funds generated by these projects will be reallocated at the unit level and some at the university level.
- Our six-year plan for the state assumes that by 2014 more than 10% of incremental costs will be covered through the reallocation of existing resources or revenue generated from other than student tuition, including roughly \$1 million from projects of the sort noted earlier.
- A tracking system is in place to follow progress and report and certify results. The innovation and greater efficiency website at [www.wm.edu/innovation](http://www.wm.edu/innovation) provides more detail about the entire initiative.



# 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* **
Challenge 1 – Leading Liberal Arts University									
1.	Undergraduate acceptance rate <sup>a</sup>	34%	34%	34%	32%	Avail. 10/2011	34%	33% (2010-11)	9% (2010-11)
2.	Undergraduate yield rate <sup>a</sup>	37%	35%	34%	35%	Avail. 10/2011	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	Avail. 10/2011	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)
Challenge 2 – Diversity									
7.	Undergraduates who are members of historically underrepresented groups <sup>a9</sup>	20%	22%	23%	25%	Avail. 10/2011		26% (2010-11)	33% (2010-11)
8.	Graduate/professional students who are members of historically underrepresented groups <sup>a9</sup>	13%	13%	13%	14%	Avail. 10/2011		16% (2010-11)	21% (2010-11)
9.	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)
Challenge 3 – Lifelong Connection									
10.	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)
Challenge 4 – Business Plan									
11.	US News & World Report: Financial resources rank <sup>b</sup>	111	88	85	97	Avail. 9/2012	<70	60 (2010-11)	26 (2010-11)
12.	Total sponsored program expenditures (millions) <sup>a</sup>	\$50	\$50	\$54	Avail. 1/2012	Avail. 1/2013	\$60 by 2014	\$344 (2009-10)	\$113 (2009-10)
13.	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
14.	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)
Challenge 5 – Administrative Resources and Infrastructure									
15.	All E&G Facilities Condition Index <sup>e5</sup>	12.4%	11.0%	7.6%	7.8%	Avail. 12/2011	<10%	9.4% (2009-10)	Not available
Challenge 6 – Communications									
16.	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)
17.	US News & World Report: Public Universities <sup>b</sup>	6	6	6	6	Avail. 9/2012		2 (tie) (2010-11)	11 Not applicable



# USNWR Methodology

	Weight (%)	2009	2010	2011	2012
W&M rank among all universities		32	33	T-31	T-33
W&M rank among public universities		6	6	6	6
Overall score (top ranked school = 100)	100	65	64	67	69
Academic Reputation	22.5				
Peer assessment (5 highest)(Pres/Prov/Deans)		3.7	3.8	N/A	N/A
Academic assessment (Pres/Prov/Deans/H.S. Counsellors)		N/A	N/A	79	79
Graduation & freshman retention rank	20	18	19	19	19
Faculty resources rank (class size, salaries, degrees)	20	44	50	47	55
Student selectivity rank (scores, class rank, acceptance rate)	15	31	32	30	31
Financial resources rank (spending per student)	10	111	88	85	97
Graduation rate over-performance (actual versus predicted)	7.5	+6	even	+4	+2
Alumni giving rank (% who gave -- two-year moving average)	5	43	42	35	34

Green – improvement

Red – decline



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Peer assessment (5 highest)(Pres/Prov/Deans)		3.7	3.8	N/A	N/A
Academic assessment (Pres/Prov/Deans/H.S. Counsellors)		N/A	N/A	79	79
<b>Graduation &amp; freshman retention rank</b>	<b>20</b>	<b>18</b>	<b>19</b>	<b>19</b>	<b>19</b>
Average freshman retention rate (percent)		95	95	95	95
<b>Faculty resources rank (class size, salaries, degrees)</b>	<b>20</b>	<b>44</b>	<b>50</b>	<b>47</b>	<b>55</b>
Percent classes under 20		49	45	48	47
Percent classes over 50		7	7	7	8
Student-faculty ratio		11:1	11:1	12:1	12:1
Percent full-time faculty		91	92	89	89
<b>Student selectivity rank (scores, class rank, acceptance rate)</b>	<b>15</b>	<b>31</b>	<b>32</b>	<b>30</b>	<b>31</b>
SAT 25th percentile		1250	1250	1240	1260
SAT 75th percentile		1450	1440	1450	1440
Freshmen in top 10 <sup>th</sup> (percent)		79	79	79	79
Acceptance rate (percent)		34	34	34	32
<b>Financial resources rank (spending per student)</b>	<b>10</b>	<b>111</b>	<b>88</b>	<b>85</b>	<b>97</b>
<b>Graduation rate over-performance (actual versus predicted)</b>	<b>7.5</b>	<b>+6</b>	<b>even</b>	<b>+4</b>	<b>+2</b>
Predicted rate (percent)		86	91	87	88
Actual rate (percent)		92	91	91	90
<b>Alumni giving rank (% who gave--two-year moving average)</b>	<b>5</b>	<b>43</b>	<b>42</b>	<b>35</b>	<b>34</b>
Percent of alumni giving		23	22	22	23



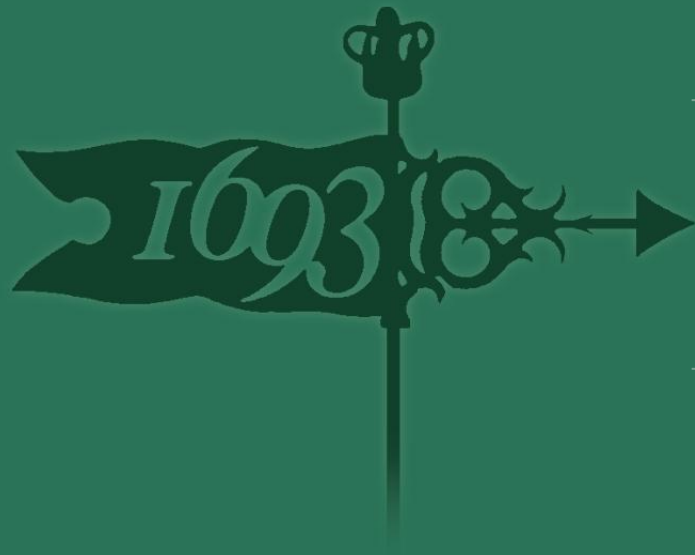
## Discussion

First, what are the Board's aspirations for W&M?

Second, what must be the Commonwealth's role if we are to meet those aspirations?

Third, why is W&M's success in meeting those aspirations important to the state?





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Communications

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# William & Mary Board of Visitors

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September 2011



## Core Messages

There is only one W&M – a public Ivy with a storied past that produces leaders who change the world.

W&M is a public Ivy, integrating the intimacy of a liberal arts college with the reach of a research university – the best of both worlds – a great blend of teaching and research.

One of the world's great liberal arts universities.



W&M is a lifelong experience – those linked to W&M are stewards of a great inheritance. Those connected to the university become members of a family, a tribe.

W&M is an engaged community making a difference for the better – our students come wanting to change the world and leave with the tools to do it.

We prepare students to make a difference, to be leaders, regardless of their field.

Together we are building a sustainable financial future.



# Communication Coordination

## President's Communication Group

Reveley (chair), Ambler, Broaddus, Coleman,  
Cottrell, Fox, Golden, Granger, Halleran, Pieri,  
Whitson, Wynn

## Communication Working Group

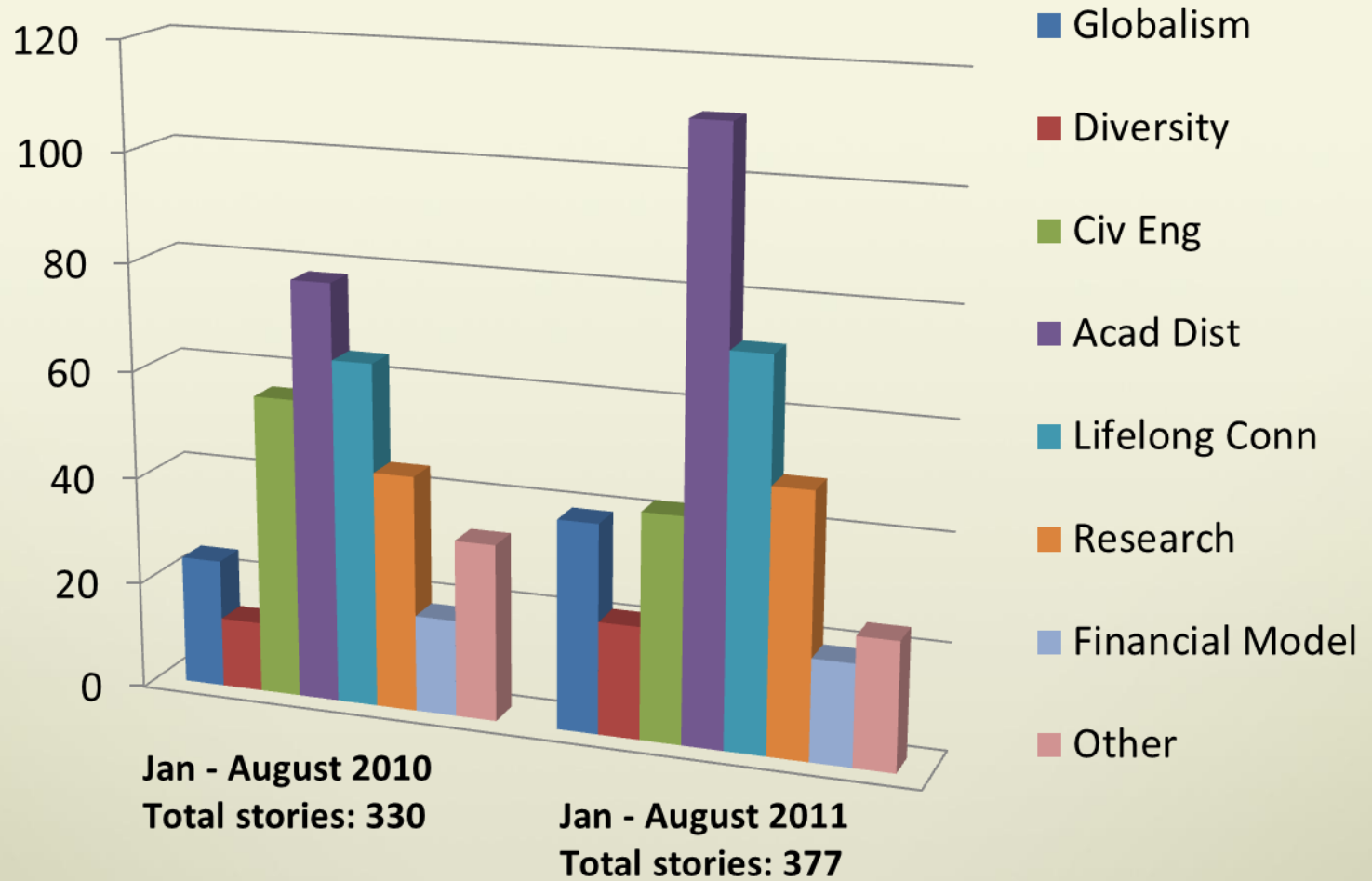
Golden (chair), Bradford, Coleman,  
Henderson, Malmquist, Slevin, Stevens, Vander  
Vorst, Whitson, Wolfe, Wynn

## Campus-Wide Communication Council

Wynn (Chair)  
Senior communication staff person chosen by leadership of each major campus organization



## W&M News Content



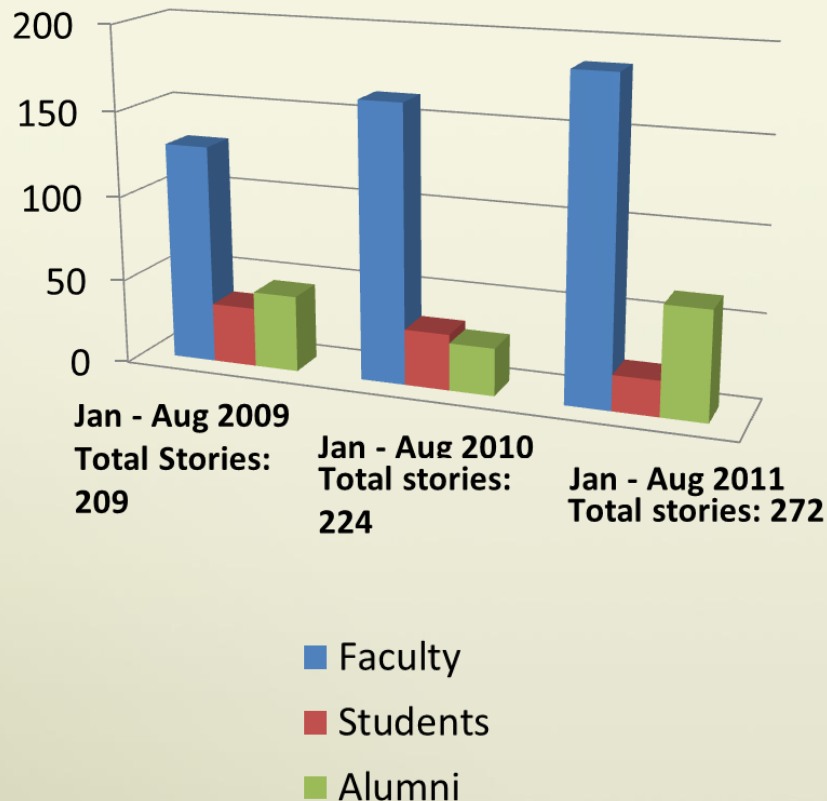


## Faculty Coverage in Major Media

### Featured Experts

Psychology Professor **Cheryl Dickter** discussed brain waves and stereotyping in the context of the international response to accused mass murderer Anders Behring Brevik in AP, ABC News, CBS, MSNBC, WP and Yahoo!News.

Geology Professor **Chuck Bailey** and Biology Professor **Bryan Watts** and Research Biologist **Fletcher Smith** discussed the Virginia earthquake and a young whimbrel that flew through Hurricane Irene, respectively. In a one week time-span the trio had placements in WP, AP, Houston Chronicle, NPR, WTOP, Christian Science Monitor, USA Today and ABC World News Tonight.





# Faculty Experts



- A searchable database by name, department and keyword.
- Featured expert widget, selected based on breaking news.
- Added photos, links to W&M News stories and videos.
- Tripled the roster of faculty experts from 60 to 180 since initial launch in spring 2010.





# Managing Major Stories

***Robert Gates '65 to Serve as W&M Chancellor***

***\*As of 1 p.m. after 9 a.m. announcement***

## **National or D.C. Placements**

Washington Post  
USAToday  
Wall Street Journal  
The Hill  
Yahoo News  
Seattle Post Intelligencer  
Washington Examiner

## **Associated Press**

CBS News  
Houston Chronicle  
Danbury News Times  
Sacramento Bee  
The Virginian-Pilot  
Richmond Times-Dispatch  
WTKR News 3  
WSET ABC 13 (Lynchburg, Danville, Roanoke)  
The News Advance (Lynchburg)  
WNCT 9 (Greenville, Jacksonville, New Bern, Washington)  
Progress-Index.com  
Atlanta Journal Constitution



## **Additional Outlets**

Forbes  
Daily Press  
WYDaily  
The Virginia Gazette  
WDBJ News 7 (Roanoke)  
National Journal  
Stars and Stripes



## Rankings, Rankings, Rankings

- *Times Higher Education* (Sep 10) – 75<sup>th</sup> in the world (unchanged).
- *U.S. News & World Report* (Sep '11)
  - T-33<sup>rd</sup> for best national university (down 2 – NYU, Brandeis)
  - 6<sup>th</sup> best public university (unchanged)
  - 8<sup>th</sup> best college for undergraduate teaching (down 3)
  - T-26<sup>th</sup> best university ranked by high school guidance counselors (up 4)
- *Forbes* (Aug '11) – 49<sup>th</sup> overall national ranking (down 3); 5<sup>th</sup> best public college (includes military academies); 2<sup>nd</sup> best state-supported school (*Forbes.com*); 20<sup>th</sup> best research university
- *Kiplinger's* – 4<sup>th</sup> in best value national ranking (unchanged)

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- *Newsweek Daily Beast* (Aug '11) Top 25 Lists – campus activism 24<sup>th</sup>; developing future politicians 19<sup>th</sup>; most beautiful campus 25<sup>th</sup>; return on investment 19<sup>th</sup>
- *New – Best Colleges.Org* (Aug 11) – 5<sup>th</sup> best university overall; 8<sup>th</sup> for campus beauty



## Military Friendly designation by G.I. Jobs

<http://www.militaryfriendlyschools.com>

- Application fee waivers to veterans.
- William & Mary is a participant in the [Yellow Ribbon](#) program, which helps student veterans fund tuition expenses beyond Veterans Affairs (VA) benefits.
- The school of education's [New Horizons Family Counseling Center](#) offers free, confidential counseling to William & Mary student veterans and their families.
- The law school's [Lewis B. Puller, Jr. Veterans Benefits Clinic](#) has served more than 300 veterans and their families, helping them apply for benefits.
- The business school began a new [pilot MBA](#) program this summer for 20 Army logistics officers.
- In 2007, a group of students began the very active [Veterans Society of William & Mary](#).
- In spring 2011, 224 students were receiving VA benefits. Of those, 90 were listed as veterans including 19 students on active duty, and 134 were dependents.



# There is only one William & Mary, and it's Ours







Celebrating Tradition & Forging Change

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# William & Mary Board of Visitors

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September 2011



## 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. Link to 6-year state plan and potential campaign.





## Extending the Strategic Plan Into the Six-Year Document for the State: Expenditures



- Expand the W&M core of engaged learning – fund resources for exceptional faculty and research. Salary adjustments critical.
- Support initiatives flowing from the ongoing curriculum review – international, interdisciplinary, even more engaged
- Ensure access to those students who are qualified and can take best advantage of our unique programs
- Provide key support resources – staff, library, IT, maintenance backlog



## Extending the Strategic Plan Into the Six-Year Document for the State: TJ21 Objectives



- Increased enrollment – 150 VA undergraduates over 4 years
- Sustained affordability – 25% Incremental tuition for financial need
- STEM – majors, ISC3, Center for Energy and Environment, Research Opportunity Fund, Collaborations – public and private
- Economic development and entrepreneurship – Technology and Business Center, Mason School Entrepreneurship Center
- Efficiency – Review summer use of facilities, expand summer academic programs – formal courses and research. Sustain Innovation Project launched in 2010.



# W&M Annual Planning Model

## Process

Challenges

Goals

Five-Year Framework

Annual Steps Tied to Budget

## Assessment

Top Level Dashboard

Second Level Dashboard

Implementation Tracking





## Status of Implementation Steps

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

Year Initiated	Not Yet Started	Underway	Completed	Into Continuing Practice	Total
2009-2010	0	9	49	38	96
2010-2011	0	10	24	29	63
2011-2012	19	37	6	16	78



Celebrating Tradition & Forging Change

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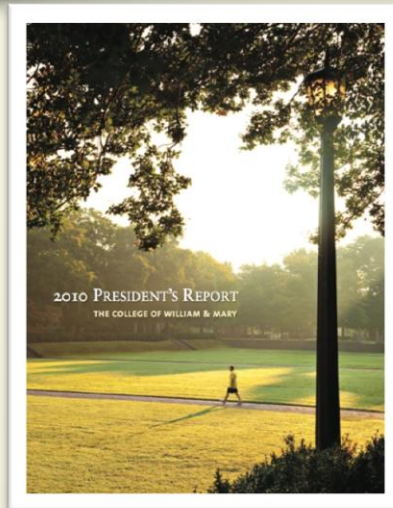
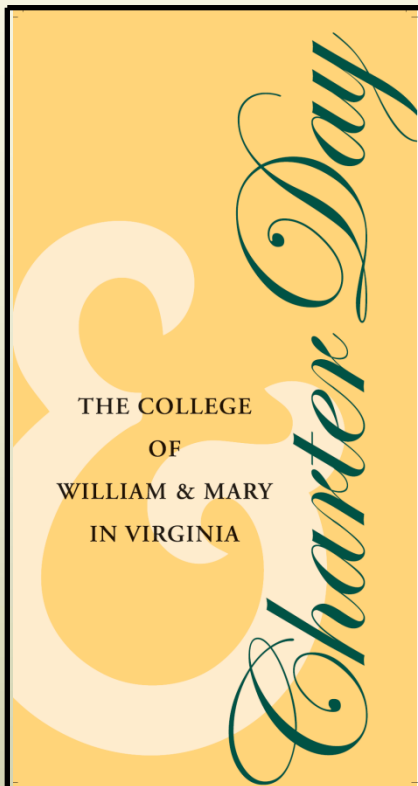
# William & Mary Board of Visitors

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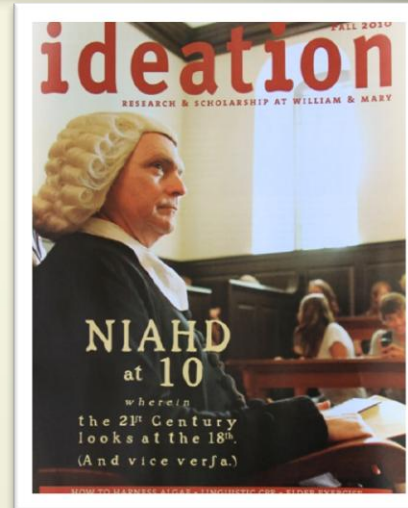
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# Campus Communications



President's Report



Ideation – On Line



Admission Video



Holiday Greeting

