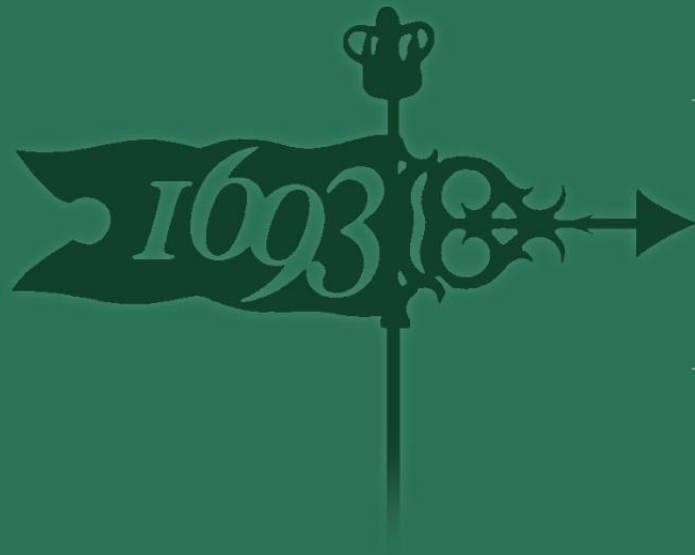




Celebrating Tradition & Forging Change

William & Mary Board of Visitors

December 2011



Communications



Strategic University Communications: Many Participants



Strategic
Initiatives



The Brafferton



Admission



Alumni
Association



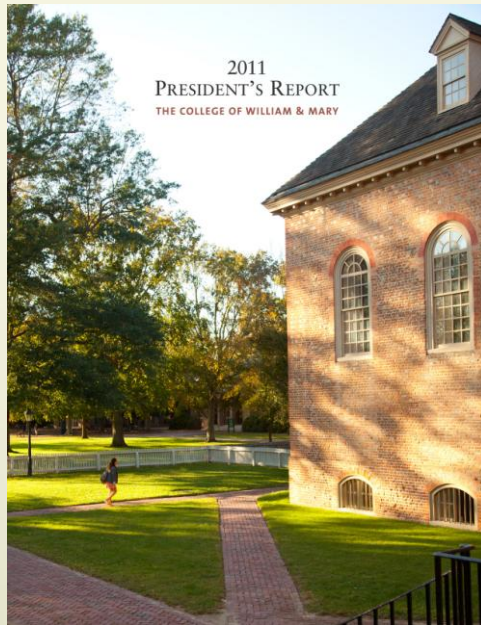
University
Development



Student
Affairs



Communication adjustments implemented under the strategic plan



- Annual Plan
- Events
- Presidents Report
- Message Map
- Visual Identity

President's Communication Group

Reveley (chair)

Communication Working Group

Golden (chair)

Campus-Wide Communication Council

Wynn (Chair)



Staying on Message

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





Engaged learning prepares students for the demands of the 21st Century

Engaged Learning



W&M combines 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.

Developing Leaders

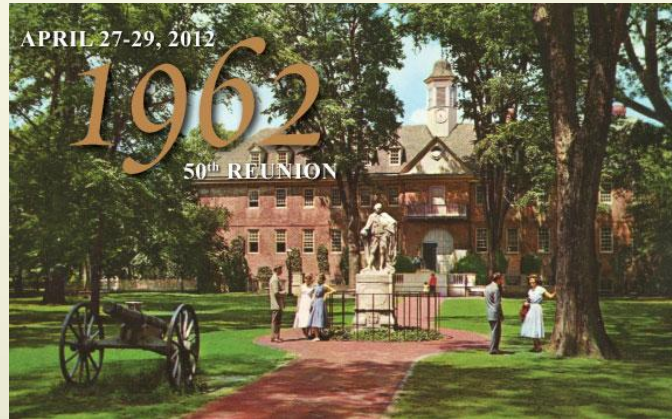
W&M is making a difference for the better – our students come wanting to change the world and leave with the tools to do it.





We are connected and stewards of a great inheritance.

Connected



W&M is a lifelong experience. The connections formed here make us part of a special group, a tribe.

New Financial Model

Those linked to W&M are stewards of a great inheritance. Together we are building a sustainable financial future.





Strategic Initiatives



Tina Coleman

Acting Director,
Creative Services



Brian Whitson

Director,
University Relations



Leonard Sledge

Director,
Economic Development



Fran Bradford

Associate VP,
Government
Relations



Creative Services and University Relations



Tina Coleman
Acting Director,
Creative Services

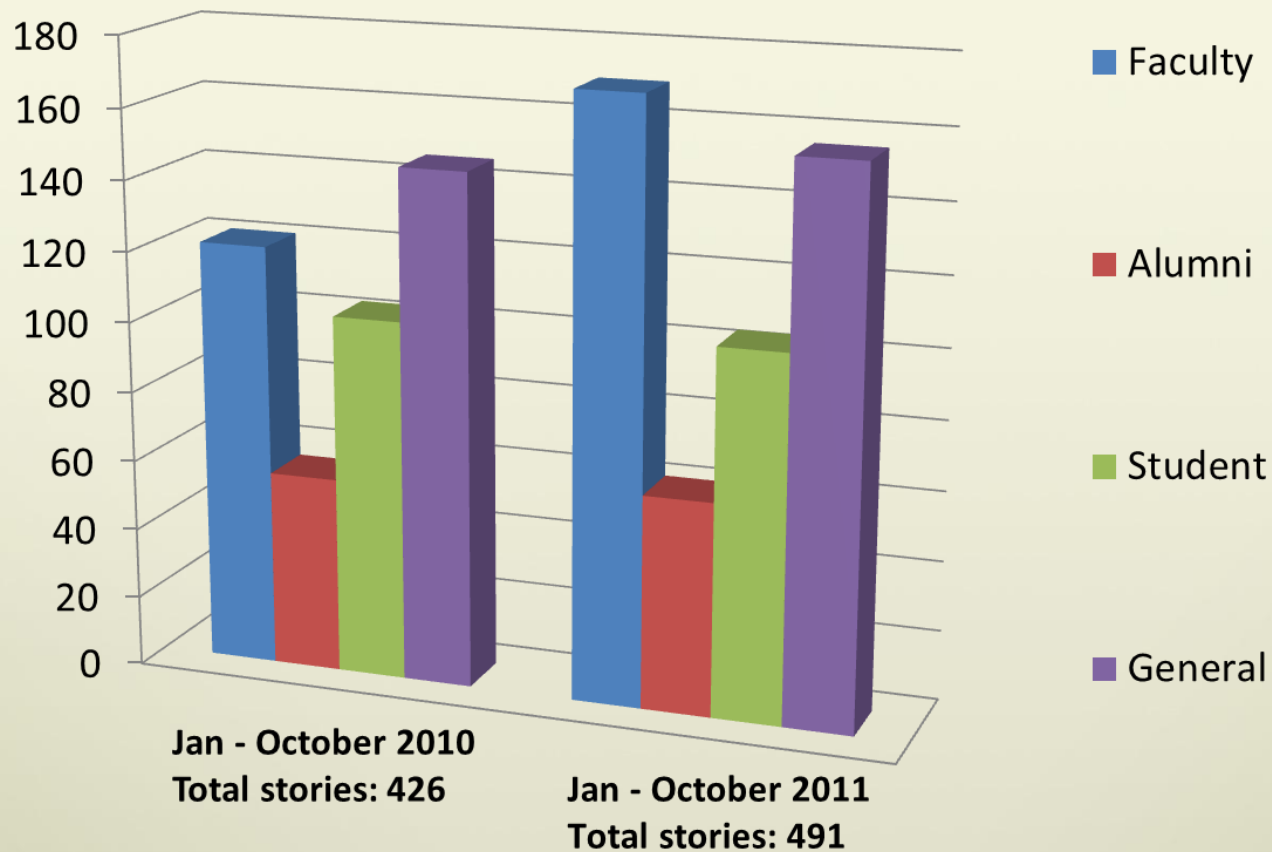


Brian Whitson
Director,
University Relations

The screenshot shows the William & Mary website homepage. At the top, there is a navigation bar with links for BLOGS / SOCIAL STREAM, myWM / DIRECTORY / EVENTS / VISIT / W&M A-Z, and a search bar. Below this is a large banner image of a tree-lined path leading to a building, with the text "The path of learning is not always level" at the bottom. To the right of the banner is a "LIBERAL ARTS @work" feature with a photo of Kate Pierce-McManamon '05 and a quote about liberal arts education. Below the banner are three main sections: "Events" featuring Terry Meyers' research on slavery, Sudan's Perfect Storm, and W&M Jazz Combo; "W&M News" featuring a China conference, a J-Lab scientist award, and W&M's ranking in "Open Doors"; and "STUDENT BLOGS" featuring Krissa's blog about trees in Colonial Williamsburg. The footer contains contact information for The College of William & Mary and various links for alumni, students, and faculty.



W&M News Content by Group





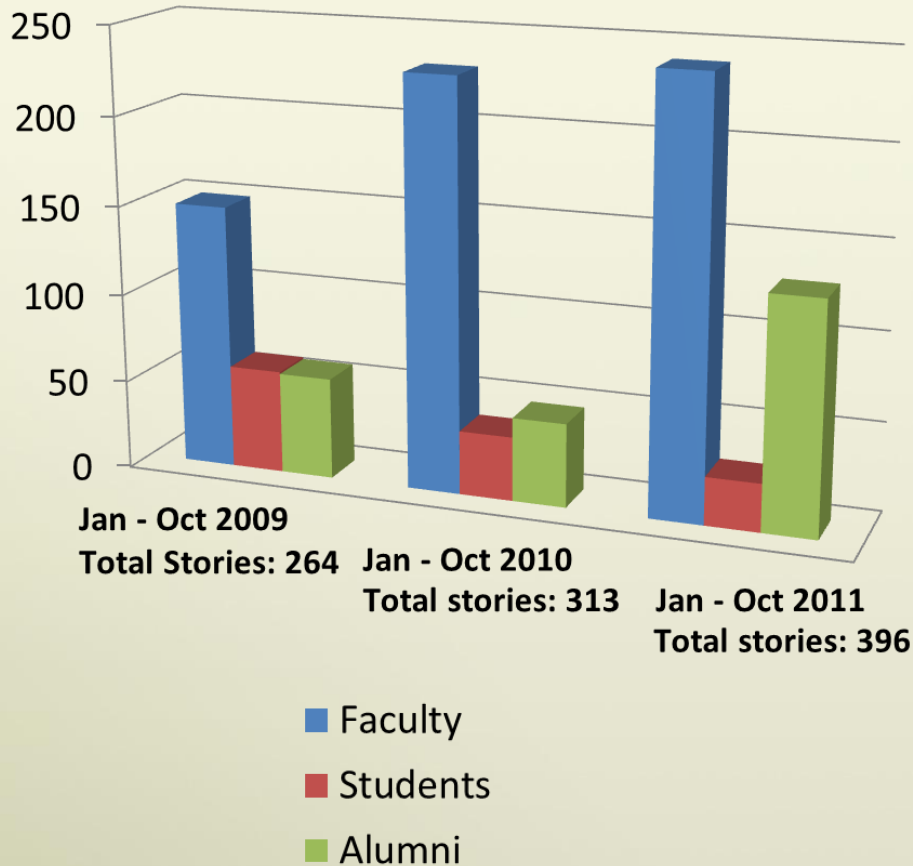
Faculty Experts

The screenshot shows the William & Mary News & Events website. The header includes navigation links: BLOGS / SOCIAL STREAM, myWM / DIRECTORY / EVENTS / VISIT / W&M A-Z, and a search bar. Below the header is a green navigation bar with links: ABOUT, ACADEMICS, ADMISSION, RESEARCH, CAMPUS LIFE, ATHLETICS, ALUMNI, NEWS & EVENTS, and GIVING. The main banner features the William & Mary logo and the text "News & Events" over a background image of a building. The left sidebar contains links: News & Events, Law Experts, VIMS Experts, and Are You an Expert?. The main content area is titled "W&M Experts" and includes the following text: "Home » News & Events » W&M Experts", "William & Mary faculty and staff are widely quoted in the national and international media for their scholarship and professional leadership. Breaking news or trend story - a William & Mary faculty or staff member can help your audience better understand the story.", "To search for experts at the [W&M Law School](#) or the [Virginia Institute of Marine Science](#), visit their respective websites.", and "If you have questions or are unable to reach an expert call [University Relations](#) at 757.221.1631." On the right, there is a "FEATURED EXPERT" section with a photo of Nancy Schoenberger and a bio: "W&M English Professor Nancy Schoenberger has co-authored the most comprehensive book ever on the controversial romance between Liz Taylor and Richard Burton."

- A searchable database by name, department and keyword.
- 190 faculty experts



Faculty Coverage in Major Media



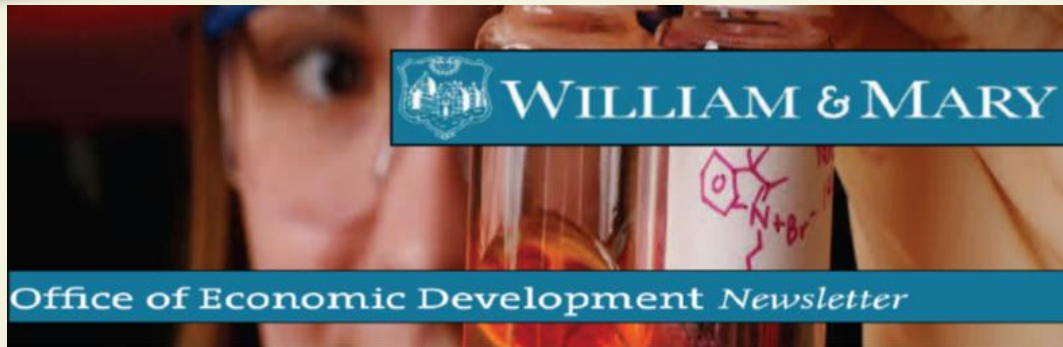
Featured Experts

Cabell Research Professor of Law **Timothy Zick**, an expert on public speech rights -- First Amendment issues raised by the nationwide "Occupy" movement. USA Today, The Wall Street Journal, The Huffington Post, The Philadelphia Inquirer, The Dallas Morning News, Salon, The Miami Herald, The Boston Globe, ABC News, Bloomberg BusinessWeek, and the Chicago Sun-Times.

A recent AP story "Women Making Slow, Sure Strides In Science, Math" spotlighted Professor of Chemistry **Elizabeth Harbron's** success in the development of young women scientists at W&M. The article was picked-up by dozens of print and online news outlets.



Economic Development



Leonard's Corner



Welcome to the ninth edition of the [College of William & Mary's Office of Economic Development](#) newsletter - CONNECTIVITY.

It has been an interesting fall semester at William & Mary. In spite of an earthquake and hurricane, the William & Mary community successfully started another academic year. In fact, since 1693 the College has welcomed aspiring men and women into its classrooms and laboratories to learn. Needless to say, much has changed at William & Mary since the 17th century...new buildings, new programs of study, new tools to learn, and so on. What has not changed is the intellectual curiosity, commitment to service, and ingenuity that personifies the Tribe family.

As you read this issue of CONNECTIVITY, please take note of what is only a small representation of the exciting activity at William & Mary and the people who make it a reality.

And remember, before you leave, please be sure to take a look at our [five major economic development projects](#): 1) [Greater Williamsburg](#), 2) [Chesapeake Bay](#), 3) [Hampton Roads Technology Clusters](#), 4) [City of Portsmouth - World Class Maritime Center](#), and 5) [The Petersburg Partnership](#). These projects are essential components of the work William & Mary does to build a stronger economy throughout Virginia.

[Connectivity]

Bean Takes Helm at the Virginia Business Incubation Association

[Bill Bean](#), director of William & Mary's Technology and Business Center has been elected president of the [Virginia Business Incubation Association \(VBIA\)](#). He is joined on the board by [Ron Monark](#), the managing director of [William & Mary's Alan B. Miller Entrepreneurship Center](#). [READ MORE](#)



Tribe Square Ushers in New Era of Student-Oriented Businesses

Tribe Square, which was dedicated October 20, has promoted an increase of student-oriented businesses in the Williamsburg area, according to William & Mary officials. College officials have been advocating for more student-focused businesses within walking distance of the campus for more than five years. The William & Mary Real Estate Foundation was founded in 2006 to create such a destination, and the result was Tribe Square. [READ MORE](#)



William & Mary Receives \$2.5 million for STEM Education

The College of William & Mary has received a sole-source contract from the Department of Defense for a total of \$2.5 million over three years. The first year of the contract is underway, funding science, technology, engineering and math (STEM) outreach and training for Naval scientists and engineers who volunteer in school divisions. [READ MORE](#)



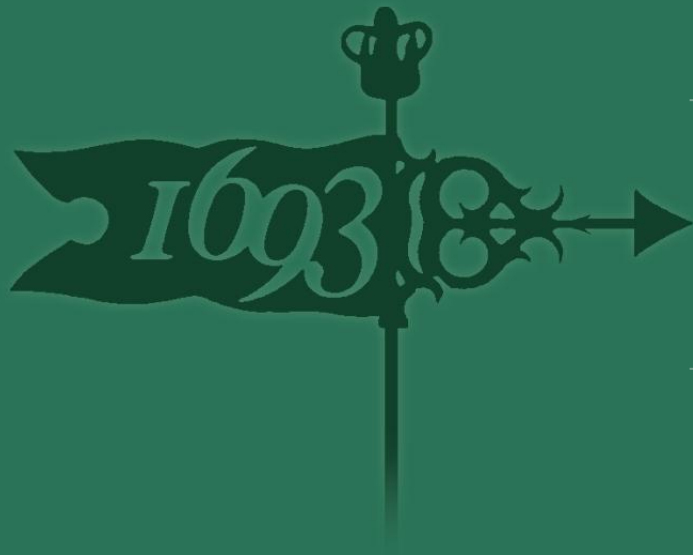
Leonard Sledge

Director, Economic Development



Bill Bean

Director, Technology and Business Center



Strategic Planning



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.





Vision Discussions Underway

- The vision should be more **aspirational**.
- We would like to sharpen the focus on the **transformative experience students have at W&M**. There are solid proof points that W&M alumni have been and continue to be leaders in a wide variety of fields.
- Our discussions about the liberal arts university have underscored our core strength in **engaged learning** and the development of critical thinking.



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



Challenge 1



Vision



1. Leading Liberal Arts University

- 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.



More Global



- W&M ranks first among U.S. public doctorate-granting institutions in the percentage of its students who pursue short-term study abroad -- *2011 Open Doors* report issued by the Institute for International Education (IIE).
- More than two in five W&M students (43.9 percent) pursued “short-term” study abroad of eight weeks or less during the 2009–2010 academic year.



Challenge 2

2. Welcoming



November/December, 2011

Welcome to the third issue of VOICES. In Spring, 2010 as a part of the Strategic Plan, I worked with academic and administrative departments to conduct an internal review of current diversity programs and initiatives. In this issue several programs from Arts and Sciences, VIMS, Law, Education, and Business are highlighted. In addition you will find other diversity happenings from around campus. If you have information that you would like to share, please email diversity@wm.edu. Have a great month!
Chon Glover

VOICES

Office of Diversity and Community Initiatives

Homecoming 2011 Milestones



On the occasion of their 40th Class Reunion, the first three residential undergraduate African American students were recognized. They are Lynn Briley, Janet Brown Strafer, and Karen Ely. During a reception on Saturday, words of thanks and appreciation were shared by Rector Jeff Trammell, President Taylor Reveley, former Vice President for Student Affairs, Sam Sadler, and former William and Mary Dean of Admission and 1971 classmate, Virginia Carey. Earl Granger, president of Hulon Willis Alumni Association presented the women with a Torch award on behalf of the Alumni Association and Chon Glover, Assistant to the President for Diversity presented each with a replica of a plaque that will be placed in Jefferson Hall where they lived for three years.



The Gay and Lesbian Alumni Association (GALA) celebrated its 25th Anniversary during Homecoming. A full weekend of activities included a Birthday Party at Swem, a formal dinner in the Great Hall of the Wren Building, and a Sunday Brunch. The group was greeted by President Taylor Reveley, Rector Jeff Trammell and more. In addition, GALA presented its *Director's Cup* to Gary Cowling, '84. In the picture on the left, leaders of Lambda Alliance talk with President Reveley and Rector Trammell at dinner. Students pictured are Kim Green, Cassie Cole, and Cody Sigmon. Congratulations, GALA!

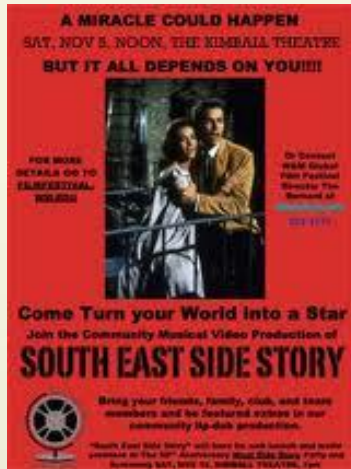


News from the Reves Center

International Education Week is a joint initiative of the U.S. Department of State and the U.S. Department of Education. It is designed to allow schools, colleges and universities, embassies, international organizations, businesses, associations, and



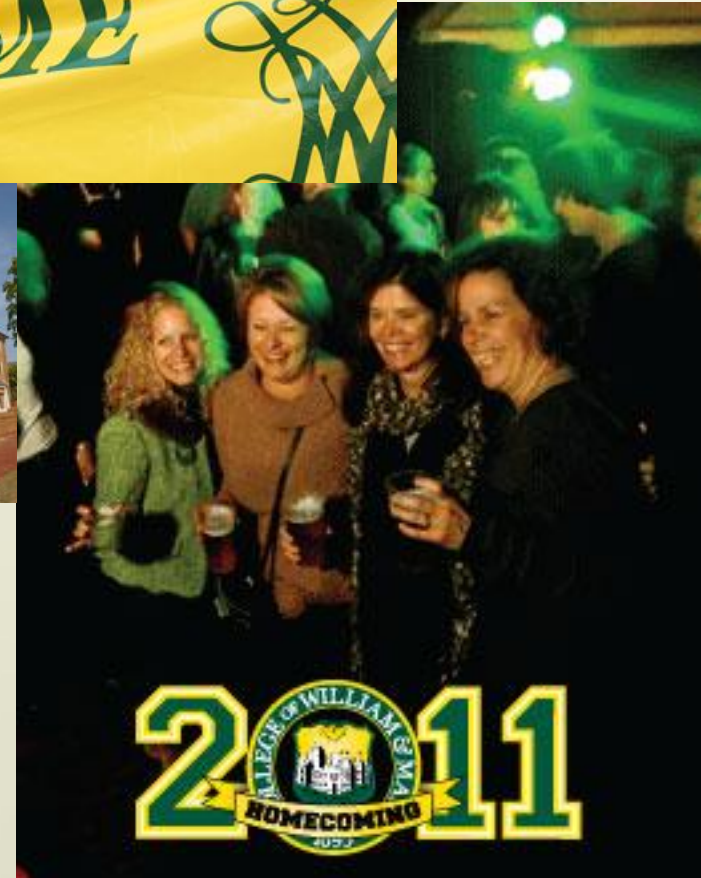
South East Side Story: A New Spin on Town-Gown Relationships





Challenge 3

3. Connected for a Lifetime



McGlothlin Leadership Forum launched
November 1-3



Challenge 4

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

- Continue emphasis on annual giving.
- Strategic investment in development operations.
- Ensure alignment of fund raising efforts with strategic priorities.
- Start implementation of 6-year plan.
- Implement innovation and greater efficiency projects – www.wm.edu/innovation.



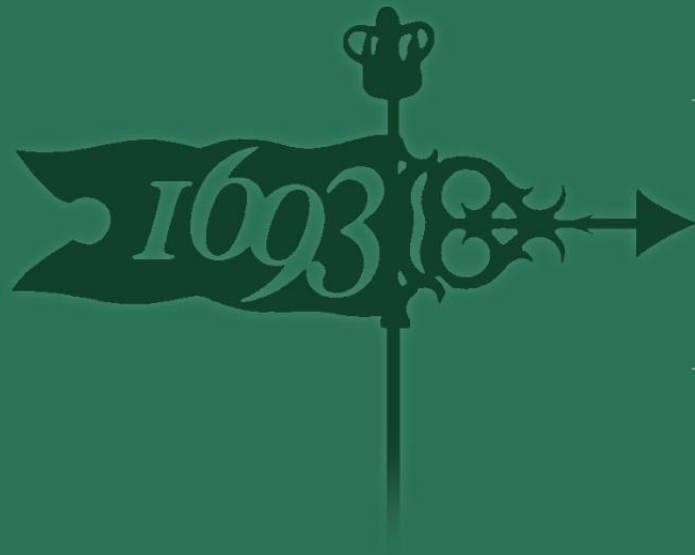
Innovation and Greater Efficiency

- In October 2010, President Reveley launched the project. Over 60 innovation projects are already underway. We continue to add new projects.
- When fully implemented, the projects already underway 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 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.
- The Provost has been working with deans to identify other initiatives.



Academic Macro Strategic Issues

Discussion led by Mr. Scott and Mr. Campbell



Back-up Slides

William & Mary Board of Visitors

December 2011



Top Level Dashboard: Challenges 1-2

Measures+	W&M 2009-10	W&M 2010-11	W&M 2011-12	Target
Challenge 1 – Leading Liberal Arts University				
1. Undergraduate acceptance rate ^a	34%	32%	35%	34%
2. Undergraduate yield rate ^a	34%	35%	33%	34%
3. Undergraduate 25 th – 75 th percentile SAT score range ^{b1}	1240-1450	1260-1440	1240-1450	1250-1450
4. Undergraduate graduation rates ^a	90%	Avail. 5/2012	Avail. 5/2013	93%
5. Student: faculty ratio ^{b8}	12:1	12:1	Avail. 5/2012	<13:1
6. Undergraduate small class percentage (2-19 students) ^b	48%	47%	Avail. 5/2012	50%
Challenge 2 – Diversity				
7. Undergraduates who are members of historically underrepresented groups ^{a9}	23%	25%	26%	
8. Undergraduates who are nonresident aliens ^a	2%	3%	3%	
9. Graduate/professional students who are members of historically underrepresented groups ^{a9}	13%	14%	15%	
10. Graduates who are nonresident aliens ^a	12%	11%	12%	
11. Average per-borrower cumulative undergraduate debt ^{c3}	\$21,367	Avail. 2/2012	Avail. 2/2013	<\$20,000



Top Level Dashboard: Challenges 3-6

Measures+	W&M 2009-10	W&M 2010-11	W&M 2011-12	Target
Challenge 3 – Lifelong Connection				
1. Alumni giving participation rate: undergraduates with degrees ^d	23.4%	Avail. 9/2012	Avail. 9/2013	30% by 2014
Challenge 4 – Business Plan				
2. US News & World Report: Financial resources rank ^b	85	97	Avail. 9/2012	<70
3. Total sponsored program expenditures (millions) ^a	\$54	Avail. 1/2012	Avail. 1/2013	\$60 by 2014
4. Debt Service as Percent of Operating Expense ^f	4.1%	Avail. 9/2012	Avail. 9/2013	<7%
5. Annual Total Value of Private Gifts (in millions) ^{d6}	\$43	Avail. 9/2012	Avail. 9/2013	50
Challenge 5 – Administrative Resources and Infrastructure				
6. All E&G Facilities Condition Index ^{e5}	7.6%	7.8%	Avail. 12/2011	<10%
Challenge 6 – Communications				
7. US News & World Report: National Universities ^b	31 (tie)	33 (tie)	Avail. 9/2012	
8. US News & World Report: Public Universities ^b	6	6	Avail. 9/2012	

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.



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	8	49	39	96
2010-2011	0	10	24	29	63
2011-2012	9	30	12	25	76
Total	9	48	85	93	235



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)



Rankings, Rankings, Rankings

- *U.S. News & World Report (Sep '11)*
 - T-33rd for best national university (down 2 – NYU, Brandeis)
 - 6th best public university (unchanged)
 - 8th best college for undergraduate teaching (down 3)
 - T-26th best university ranked by high school guidance counselors (up 4)
 - *Forbes (Aug '11)* – 49th overall national ranking (down 3); 5th best public college (includes military academies); 2nd best state-supported school (*Forbes.com*); 20th best research university
 - *Kiplinger's* – 4th in best value national ranking (unchanged)
-
- *Newsweek Daily Beast (Aug '11)* Top 25 Lists – campus activism 24th; developing future politicians 19th; most beautiful campus 25th; return on investment 19th
 - *New – Best Colleges.Org (Aug 11)* – 5th best university overall; 8th for campus beauty



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



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
Average freshman retention rate (percent)		95	95	95	95
Faculty resources rank (class size, salaries, degrees)	20	44	50	47	55
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
Student selectivity rank (scores, class rank, acceptance rate)	15	31	32	30	31
SAT 25th percentile		1250	1250	1240	1260
SAT 75th percentile		1450	1440	1450	1440
Freshmen in top 10 th (percent)		79	79	79	79
Acceptance rate (percent)		34	34	34	32
Financial resources rank (spending per student)	10	111	88	85	97
Graduation rate over-performance (actual versus predicted)	7.5	+6	even	+4	+2
Predicted rate (percent)		86	91	87	88
Actual rate (percent)		92	91	91	90
Alumni giving rank (% who gave--two-year moving average)	5	43	42	35	34
Percent of alumni giving		23	22	22	23



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 Plan: 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 Plan: 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

