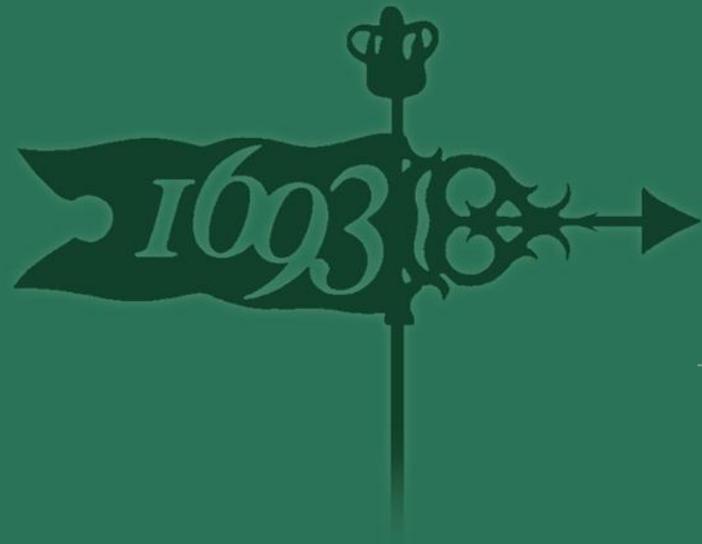


Strategic Initiatives and New Ventures

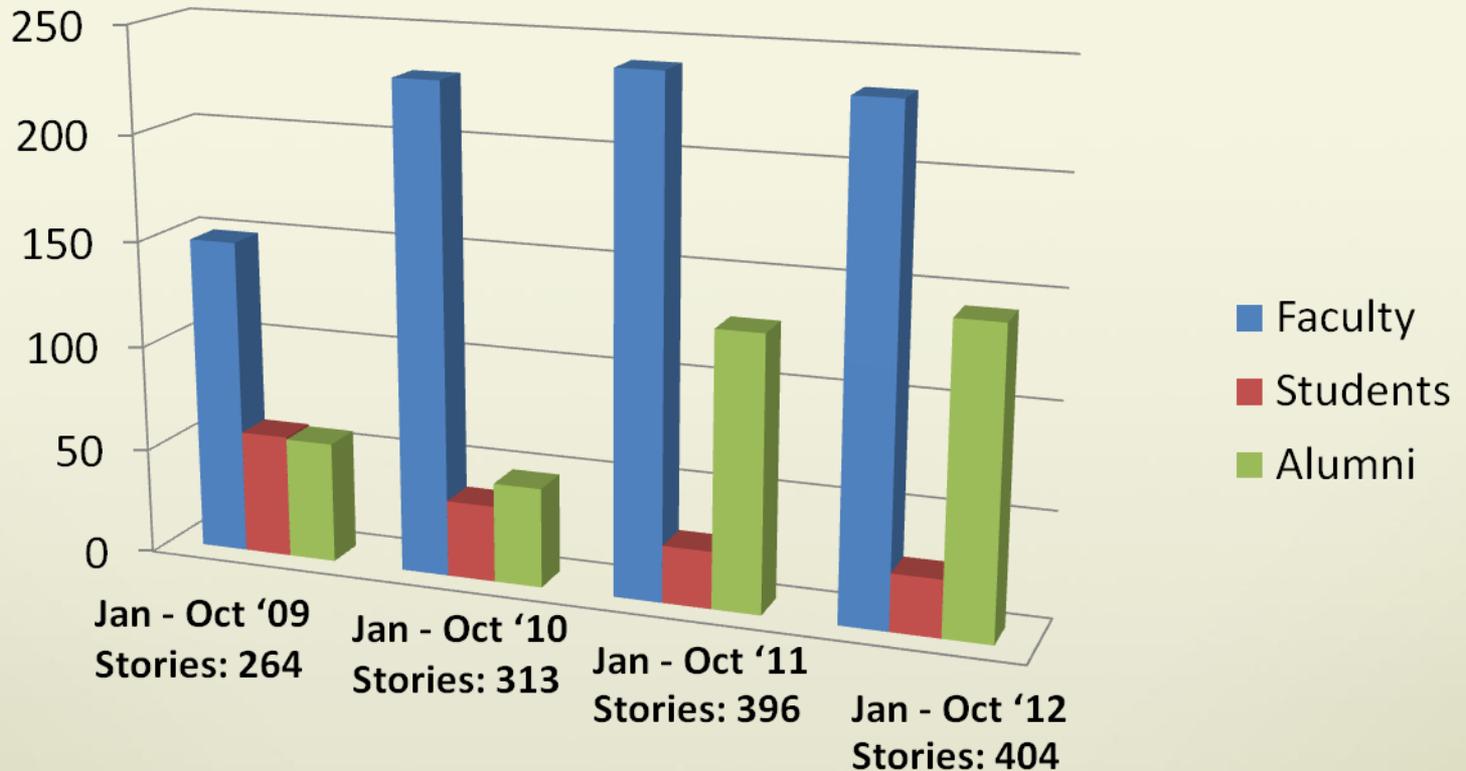
November 2012



Communications



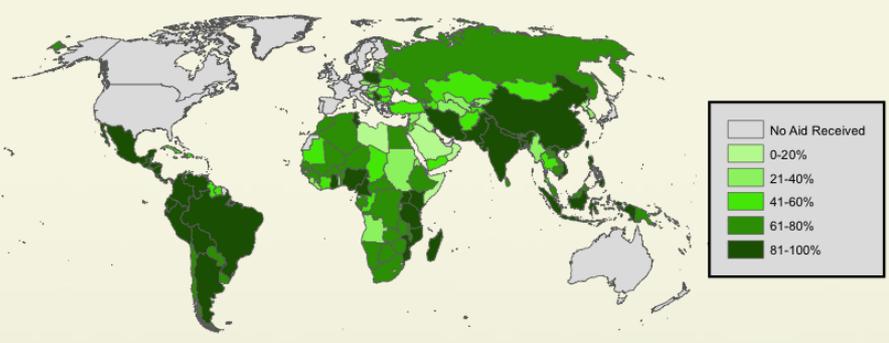
National Media – Quantity and Quality



National Media: For these tabulations, national media constitutes print and online editions of newspapers that primarily fall in Editor & Publishers "Top 50 Newspapers" according to circulations and have a national readership or are the major daily newspaper for a geographic region of the United States. This category also includes broadcast, wire, print and online coverage by national television networks and national news; and feature magazines as well as selected, major, International media outlets.



AidData – Student idea (Brad Parks '03), Faculty expertise, Global engagement, Interdisciplinary



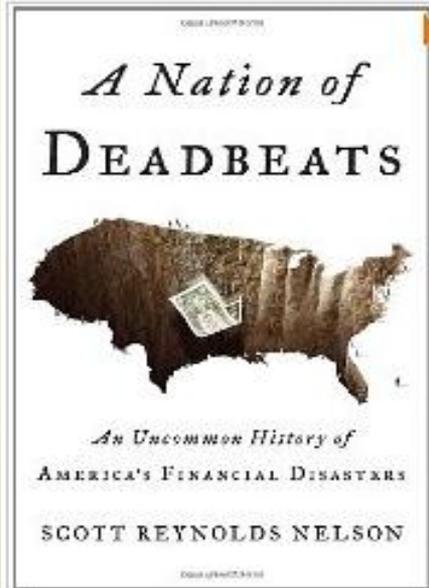
- United States Agency for International Development (USAID) five-year award of up to \$25-million to increase global aid transparency. Partners include: Brigham Young, Texas Austin, Development Gateway and ESRI.
- AidData Center for Development Policy will create geospatial data and tools to target, monitor, and evaluate foreign aid.
- Largest single financial award in W&M history

Coverage: AP story placed by W&M. Stories ran in 131 news outlets including e.g. Washington Post, Chronicle, Boston Globe, Chicago Tribune, St Louis Post-Dispatch, Kansas City Star, ABC news.

November 25 - AidData = 51,000 Google results



Faculty in the Media – Scott Nelson



National media coverage
Since release in September:
NPR, MSNBC, NBC,
Bloomberg,
Chronicle, Reuters.

Media studio will help us do
more of this



The Cycle | Aired on November 21, 2012

America's long standing addiction to debt

"A Nation of Deadbeats" author Scott Reynolds Nelson talks with The Cycle hosts about how, just like the long tradition of Thanksgiving, America has a tradition of debt that dates back to the 19th century.

MSNBC News November 21, 2012



Dalai Lama – October 10, 2012





National Coverage



Photo by
Steve Salpukas, W&M

- National media: 40 members of the press -- Fantastic coverage – AP wire, NPR, Voice of America
- W&M News website: 17,000 viewers
- Facebook hits Oct 5-11: 48,000
- Live streaming: 7,100 unique viewers
- U Tube video excerpts cut by W&M News: 6,000 viewers
- Google: “Dalai Lama + William and Mary” = 57,800 results;
“Dalai Lama + William & Mary” = 34,200
“Dalai Lama + Williamsburg” = 134,000
(www.wm.edu = #1 for all three searches)



Dalai Lama + William & Mary on Google www.wm.edu = #1

"dalai lama" + "william & mary" - Google Search - Mozilla Firefox

File Edit View History Bookmarks Tools Help

"dalai lama" + "william & mary" - Go... x Search | Mozilla Support x Where can you find the "Screengrab!"... x +

www.google.com/search?q="Dalai+Lama"+%2B+"William+%26+Mary"&ie=utf-8&oe=utf-8&aq=t&rls=org.mozilla:en-US:official&client=firefox-a#hl=en&client=firefox-a&hs=fjM&tbo=d&rls=

+You Search Images Maps Play YouTube News Gmail Drive Calendar More ▾

Google "Dalai Lama" + "William & Mary" [Search]

Web Images Maps Shopping More ▾ Search tools

About 34,200 results (0.22 seconds)

William & Mary - Dalai Lama Visit
www.wm.edu/dalailamavisit
 Oct 10, 2012 – **Dalai Lama** The event, which was sponsored by the **William & Mary** Student Assembly, was open to the public. Alma Mater Productions (AMP) ...

Dalai Lama event at William & Mary Hall to be streamed live
www.wm.edu > News & Events > More Stories > 2012
 Oct 2, 2012 – View the event live - free of charge - on Wednesday, Oct. 10 at 2 p.m..

William & Mary - Dalai Lama addresses thousands at W&M
www.wm.edu > News & Events > More Stories > 2012
 Oct 10, 2012 – The **Dalai Lama**, one of the world's most influential spiritual leaders, spoke to thousands of students, faculty, staff and community members in ...

William & Mary - A must read before attending Dalai Lama event
www.wm.edu > News & Events > More Stories > 2012
 Oct 9, 2012 – Have a ticket to see His Holiness the 14th **Dalai Lama** tomorrow at **William & Mary** Hall? If so, you'll want to review the information below before ...

College of William and Mary
www.wm.edu/
William & Mary's undergraduate researchers show their stuff. sadlerhomepage.jpg. Sadler dining hall to receive \$8 million expansion. **Dalai Lama** event at ...
 Score: **23** / 30 - 10 Google reviews - \$30 ▾

College of William and Mary Direct

©2012 Google Map data ©2012 G

SCORE OVERALL **23** Sign in for full scores and summary

10 Google reviews

Prices: \$30 ▾ per night

At a glance: phi beta kappa · early decision · incoming freshmen · colonial athletic association · marine science



Dalai Lama + William & Mary -- Images

Browser address bar: <http://www.google.com/search?hl=en&sugexp=les%3B&pq=%22dalai+lama%22+%2B%22william+and+mary%22&cp=25&g>

Navigation: +You Search Images Maps Play YouTube News Gmail Drive Calendar More -

Search bar: "Dalai Lama" + "William & Mary" [Search]

Web Images Maps Shopping More Search tools

About 6,130 results (0.27 seconds)

The image grid contains numerous photographs of the Dalai Lama. Many images show him speaking at a podium with a green sign that reads "WILLIAM & MARY". Other photos show him in a red and yellow robe, gesturing with his hands, or standing in front of a large crowd. One prominent image features a banner that says "51 YEARS OF REFUGE THANK YOU INDIA". There are also photos of him with other people, including a woman in a white shirt, and a map of the region.



Internal Communications: MY WM Old

myWM

Content Layout Portal Admin | Welcome Jesse Windley
You are currently logged in.

banner blackboard email Calendar Groups wmaps Admin Logout Help

Board of Visitors | New Student | Spring Transfers | Admitted Students | Admitted Students | myWM Home | Services | Alumni Association | Non-Degree Seeking (NDS) | Mason MBA | Flex MBA | MAcc | EMBA | Sample | September 23, 2010

Information for...

- ... Students
- ... Staff
- ... Faculty

Lists of useful links for students, staff and faculty are available on the W&M website.

Campus Announcements

There are no announcements

Personal Announcements

Complimentary Admission to W&M Students - Jesse Williams at Colonial Williamsburg

Know Your Rights and Responsibilities

The Student Handbook is the definitive source for all students regarding the rights you possess as a member of the William and Mary community. We also recommend that you familiarize yourself with other important information:

- Honor Code
- Voter Registration Information
- Student Records/Family Educational Rights and Privacy Act (FERPA)
- Alcohol and Drug Information
- Campus Crime Statistics
- Student Conduct System Information Packet (pdf)

The William and Mary News

Campus News RSS

- Linguistics and engagement: In class with Anne Charity Hudley
- Raft Debate slated for Sept. 29
- Campus forum focuses on finances, W&M's future
- W&M receives \$500k for biofuel study
- W&M student vaults onto World Equestrian stage
- Chon Glover named to ODK Board of Directors
- Paul Scott '88: Back to the 'Burg
- Zick offers expert opinion on Quran burning and First Amendment
- Sophomore's photo selected for national literary magazine

Calendars & Events

Academics	Cultural Arts
Alumni	Law School
Athletics	Muscarella Museum
Box Office	VIMS

W&M Campus Gallery

Photos of Campus, by Campus

Submit photos to the gallery

Sustainability at W&M

Meeting the Challenges of a Sustainable Future
Sustainability is a growing tradition here at the College. Your Committee on Sustainability is dedicated to providing you with opportunities to make our campus environment more sustainable.

Targeting Transportation
Currently, we're finding ways to move you around campus in a more environmentally-friendly manner. Go to the Services tab and look for a channel devoted to Sustainable Transportation. There you'll find ways to organize a carpool and keep track of Williamsburg public transit. Look for more transportation services in the near future!

Strategic Planning

Implementation of the Strategic Plan

In April 2010 the Board of Visitors endorsed a revised strategic framework for the next five years to move us toward the achievement of that vision.

Visit the strategic planning website for implementation steps for FY 2011.

IT Security Awareness

Information Security is Everyone's Responsibility

Surf smart - be cautious when using the Internet. Don't provide personal or sensitive information to Internet sites, surveys or forms unless you are using a trusted, secure web page. When in doubt, instead of clicking on an unknown or unsolicited link, look up the website on your own and go there independently.

Watch for more tips and guidelines that focus on both individual responsibility and protection of the W&M network.

Weather Channel

Williamsburg, VA

Airport Delays
Sporting Events
Pollen Reports

The Weather Channel
weather.com

74 °F
Sunny
Feels Like: 74°F
Humidity: 95%
Wind: WNW at 6 mph
Enter city/zip

Bookmarks

- uPortal
- XML



MY WM Reinvented

myWM

Search W&M

GO

[DIRECTORY](#) / [EVENTS](#) / [W&M A-Z](#)

B
Banner

Bb
Blackboard

OWA

WMApps

FACULTY & STAFF LINKS

STUDENT LINKS

Academic Calendar Course Catalog Human Resources	Information Technology Residence Life Student Accounts	Student Happenings WMDigest W&M Express
--	--	---

Events [more...](#)

SEP 13 Creating Inclusive Classrooms Brown-Bag Discussion 12:00pm

SEP 13 Boston Consulting Group Effective Interviewing Workshop 12:00pm

SEP 13 Lecture: Va. Attorney General Kenneth Guccinelli 1:00pm

News [more...](#)

Uncommon Glory: A conversation with W&M's most acclaimed actor

W&M welcomes back Rosalind Brackenbury

W&M remains a top university in latest U.S. News undergraduate ranking

Tweets [more...](#)

@TribeAthletics 10:34am // 09.13.12
Tribe men's soccer heads to the nation's heartland.
[#WMTribe](http://t.co/BReoJpgj)

@TribeAthletics 10:20am // 09.13.12
Tribe Football will play at Towson this Saturday at noon. The game will be televised nationally on NBC Sports Network.
<http://t.co/AFRZ5gtt>

@TribeAthletics 10:14am // 09.13.12
I posted 10 photos on Facebook in the album "Tribe Tennis Newcomers"
<http://t.co/KtjDUWkd>

[Careers at W&M](#) | [Policies](#) | [Emergency Information](#)

[Social Stream // W&M Blogs](#)



Alumni-Communications-Development (ACD) Initiatives

- Goal – Bring overlapping work together in a way that minimizes transactions costs and makes an immediate, serious difference for the better in advancing the good of W&M, particularly in building lifelong ties (more pride, global reputation, mutual support, help to W&M including financial).
- Process –
 - ACD Council – Cottrell, Granger, Golden (chair) – Monthly meetings
 - ACD Staff Group – Monthly meetings
- Immediate target areas –
 - Homecoming
 - **Engagement: Chapter support – coordinated strategy (Joint Board Topic)**
 - Messaging
 - Record keeping – database
 - Budget coordination
 - Calendar coordination
 - Systematic research

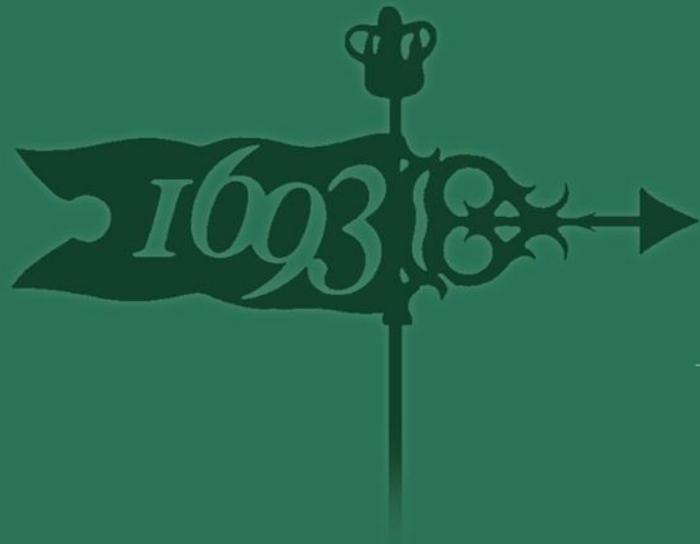


Homecoming

I don't always HARK, but when I do it's



UPON THE GALE



Strategic Planning Review



Five-Year Review

Summer

- Strategic scan
- Review of past four years
- Discussion of potential strategic initiatives

Fall

- Refinement of proposed strategic initiatives
- Comments from various constituencies
- Discussion with BOV in November

Winter

- Draft of proposed strategic initiatives to President
- Discussion with BOV in February

Spring

- Plan for FY 2014-2019 to BOV



W&M Strategic Framework



Vision



Strategic Focus

1. Leading Liberal Arts University

2. Welcoming



3. Connected for a Lifetime



5. Staffed/
Equipped



6. In Touch



4. New Financial Foundation



Implementation Steps as of November 2012

Implementation includes assignment of responsibility for each goal and implementation step, and periodic reports to track progress. Since the beginning of the new strategic management system, 275 steps have been included in the plan. Of those, 219 (80%) have been completed or adopted into continuing practice, 49 are underway and 7 are have not yet started.

Year Initiated	Not Yet Started	Underway	Completed	Into Continuing Practice	Total
2009-2010	0	6	50	39	95
2010-2011	0	5	24	33	62
2011-2012	2	16	14	39	71
2012-2013	5	22	3	17	47
Total	7	49	91	128	275



Some Major Achievements

1. Liberal arts university review; Undergraduate curriculum review launched; Marine science minor; Cross-disciplinary STEM center for K-12 teachers; Joint degree program with St. Andrews; Confucius Institute
2. Chief Diversity Officer; Diversity communications; Lemon Project
3. Lifelong Connections VP-level group; Re-designed Welcome Week, Convocation and Charter Day; Cohen Career Center; Homecoming back to campus; Fraternity residences with 180 beds; Tribe Square; Eco-Village plan
4. Connected strategy and budget; 6-year plan in response to TJ21 legislation; Strategic investments in development -- Increased gift levels, Refined messages, Activated volunteer network; Launched innovation and efficiency projects; Creative Adaptation Fund; Reallocation of school E&G budgets.
5. Renovated Small Hall; Began work on Tucker; University HR system; Business practice software; Modern network infrastructure; Recycling; Eco-Ambassadors; Sustainability Fellowships; Risk management
6. President's Communication Group coordinating structure; New Creative Services organization; Message map; Annual web-based President's Reports; Mascot search; National coverage of faculty achievements; ACD



Continuing Strategic Priorities

- A sustainable financial model that can support W&M's high aspirations
- Competitive faculty and staff salaries to attract and retain great people that are the heart of the university
- Expanded financial aid to attract the most exceptional graduate and undergraduate students
- Support for exceptional research
- A campus that welcomes all and celebrates diversity
- Coordination across all areas to build lifelong connections to W&M
- Continuous improvements in information technology infrastructure
- Provision of sufficient training and resources to staff
- Systematic work to reduce the maintenance backlog and bring all facilities up to 21st-century standards
- Persistent focus on key university messages and coordination of communications



Strategic Planning Review

- Maintain focus on unmet strategic priorities continuing from the first five years and reflected in the 6-year plan
- Continue strong links between planning priorities and budgeting decisions.
- Increase emphasis on aspirations beyond resource needs
- Adjust the process to emphasize a few truly strategic things that could have a substantial impact over the next five years
- Build on the language in the vision about breaking boundaries as an organizing principle to identify major new initiatives
- Keep the process inclusive, but also recognize the need to make the process as efficient as possible
- Recognize the organizational changes that have been made over the past five years that allow implementation of many initiatives to shift from the strategic to operational levels



Vision/ Strategic Focus

1. Leading Liberal Arts University



2. Welcoming



5. Staffed/
Equipped

We are Breaking Boundaries
across the whole range of
student-faculty-staff interactions,
with innovative teaching
approaches, learning in applied
settings, and even stronger
interdisciplinary and global
perspectives and connections.



3. Connected
for a Lifetime



6. In Touch

4. New Financial Foundation



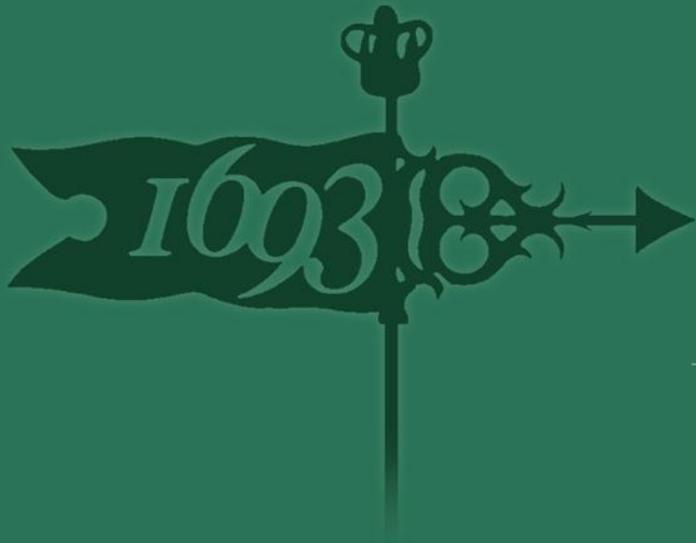
Preliminary Initiatives

- Provide Exceptional Integration of Learning Through All the Dimensions of Student Experience
- Foster Innovative Teaching Approaches that Use Technology-enhanced Modes as Appropriate
- Promote Learning in Applied Settings
- Encourage Interdisciplinary Connections Across Academic Areas
- Forge Stronger Global Perspectives and Connections
- Continuously renew our faculty by providing competitive salaries to hire and retain world-class scholars and teachers, and funds to support research and professional development



Illustrative specific steps for FY14-18

- Complete curriculum review, phase in changes
- ISC Phase 3 and expanded interdisciplinary courses and research initiatives
- W&M signature experiential leadership development program
- Replace campus center
- Expand programs through the D.C. office
- Strengthen VIMS-main campus connections
- Expand creative adaptation fund
- Major new venture applying teaching approaches that use technology-enhanced modes, potentially in continuing education in business, education and law.
- Together with real estate foundation explore additional student housing near campus providing 200+ beds in addition to fraternity project
- Increase opportunities for student global experiences while preserving quality with the goal of providing all students such an opportunity.
- Diversify the international student body
- Expand global research partnerships
- Establish university professorships to permit those designated to rotate through schools and departments to enhance interdisciplinary connections.



New Ventures



EVMS Overview

July 25 – Joint W&M/EVMS statement – both institutions will take a long, hard look at whether EVMS should become the W&M School of Medicine

- Much to study before either will be ready to make a decision one way or the other
- Any such combination would require approval by both boards as well as the Governor and General Assembly
- A positive decision requires a determination that this would be good for EVMS, good for W&M, and good for the Commonwealth

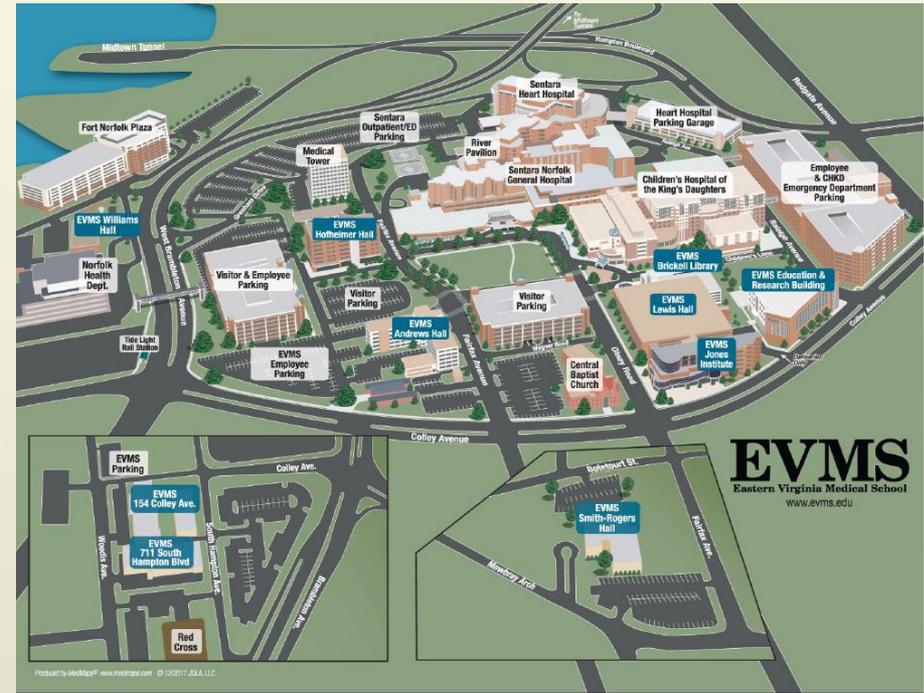




W&M Steering Committee

Members –

- Provost (chair)
- Faculty (Allison, Archibald, Deschenes, Gressard, Kaattari, Rossiter, Sher)
- Administration (Golden, Jones, Manos)
- BOV (Banks, Frantz)





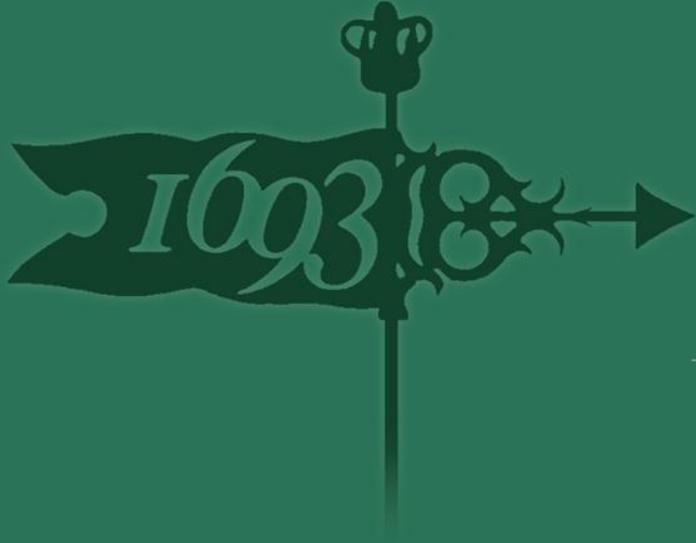
EVMS Timeline

- Charge Letter
- Meetings of Committee and Subcommittees
- Various Meetings at EVMS and W&M
- Consultant Visit
 - Jordan Cohen, consultant and former president of the Association of American Medical Colleges
- Open Forum
- Additional Activities:
 - Website for information and comments
 - Informal conversations with experts in the field



What Must Be True?

- We need a vision or value-proposition that is compelling for W&M, EVMS, the State, and the community.
- We must “do no harm.”
 - Resources, liberal arts strengths, reputation
- Relationships with EVMS clinical affiliates must be secure.
- The Commonwealth must be committed to supporting the merger in the short- and long-term



Additional Material



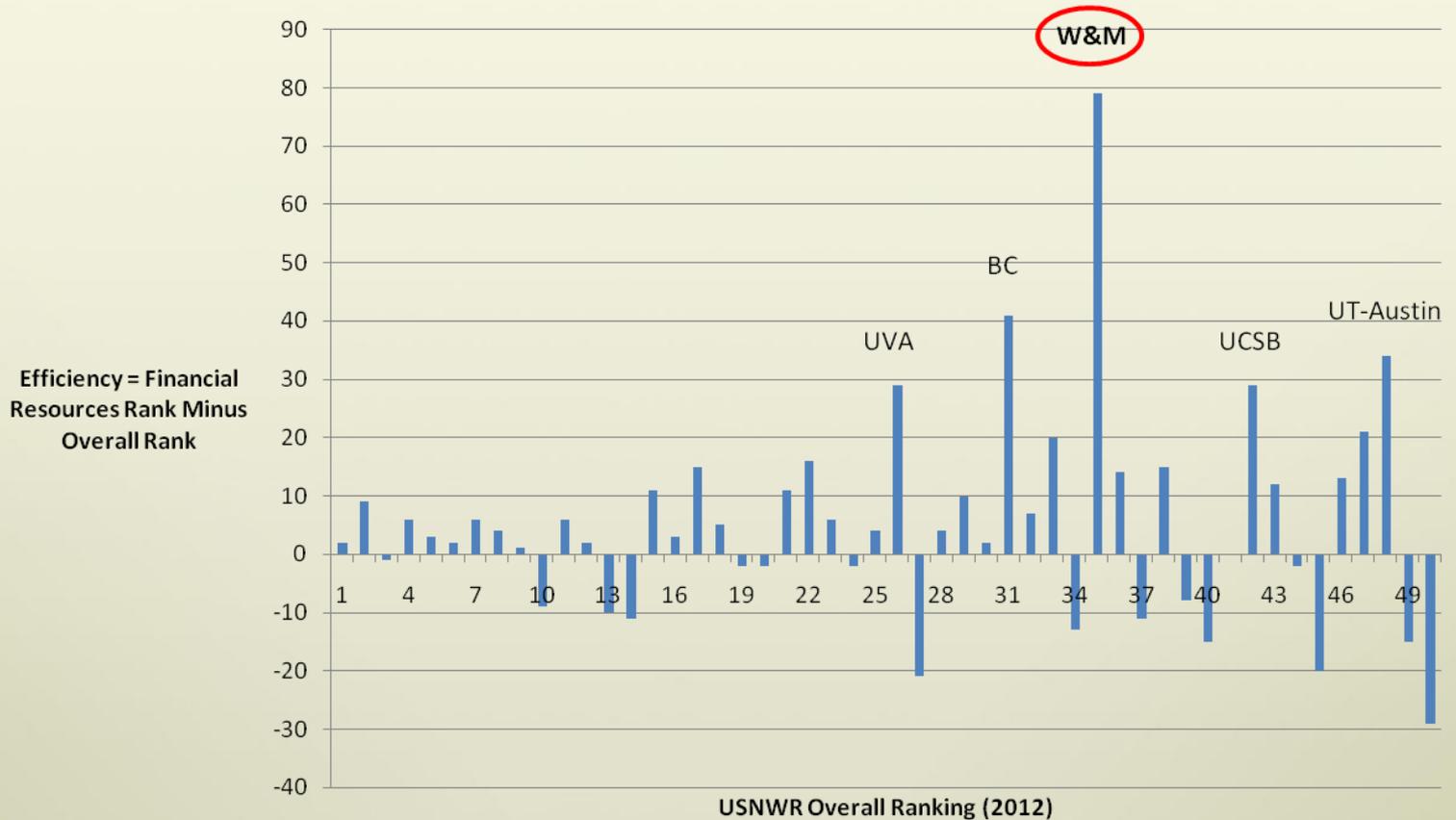
Rankings

<u>Rank</u>	<u>Annual Change</u>	<u>Category</u>	<u>Organization</u>
2	-	America's Top Colleges: State-supported	<i>Forbes</i> (2012)
4	+1	America's Top Colleges: Public	<i>Forbes</i> (2012)
4	-	"Best Value" -- Colleges and Universities	<i>Kiplinger</i> (2012)
6	+1	Top 10 Best Value Public Colleges	<i>Princeton Review</i> (2012)
6	-	Best Colleges: Top Public Schools	<i>USNWR</i> (2013)
6	+2	Best Colleges: Best Undergraduate Teaching	<i>USNWR</i> (2013)
22	+4	Best Colleges: High School Counselors	<i>USNWR</i> (2013)
33	-	Best Colleges: Top National Universities	<i>USNWR</i> (2013)
40	+9	America's Top Colleges: Overall	<i>Forbes</i> (2012)



Quality-Resource Gap

US News and World Report ranks tied for 33rd on its list of “Best National Universities,” but 112th in financial resources. That gap of 79 spaces is by far the largest for any of the top 50 ranked universities.





Vision

William & Mary: The Liberal Arts University

William & Mary redefines the academic community. Building on more than 300 years of innovation and academic excellence, we break the boundaries between teaching and research, student and instructor, living and learning. People come to William & Mary wanting to change the world – and we do.



Strategic Focus

Across the university's undergraduate, professional and graduate schools, students will develop the critical thinking and understanding of diverse perspectives essential to excel in the 21st century. William & Mary will boldly innovate in interdisciplinary study, internationalization, and faculty-student inquiry. We will sustain and expand academic distinction through exceptional stewardship of our resources, building even stronger lifetime connections with our students and alumni, and finding new ways to provide the financial resources to meet our aspirations.

Measures+	W&M 2008-09	W&M 2009-10	W&M 2010-11	W&M 2011-12	W&M 2012-13	Target	UVA* **	Brown* **	
Challenge 1 – Leading Liberal Arts University									
1.	Undergraduate acceptance rate ^a	34%	34%	32%	35%	32% Prelim.	34%	33% (Fall 2011)	9% (Fall 2011)
2.	Undergraduate yield rate ^a	35%	34%	35%	33%	33% Prelim.	34%	44% (Fall 2011)	55% (Fall 2011)
3.	Undergraduate 25 th – 75 th percentile SAT score range ^{b1}	1250-1440	1240-1450	1260-1440	1240-1450	1250-1460 Prelim.	1250-1450	1240-1460 (Fall 2011)	1340-1520 (Fall 2011)
4.	Undergraduate graduation rates ^a	91% 2003 cohort	90% 2004 cohort	91% 2005 cohort	Avail. 5/2013 2006 cohort	Avail. 5/2014 2007 cohort	93%	94% 2005 cohort	95% 2005 cohort
5.	Student: faculty ratio ^{b8}	11:1	12:1	12:1	12:1	Avail. 2/2013	<13:1	16:1 (Fall 2011)	9:1 (Fall 2011)
6.	Undergraduate small class percentage (2-19 students) ^b	45%	48%	47%	48%	Avail. 2/2013	50%	53% (Fall 2011)	70% (Fall 2011)
Challenge 2 – Diversity									
7.	Undergraduate students who are members of historically underrepresented groups ^{a9}	22%	23%	25%	26%	27%		27% (Fall 2011)	33% (Fall 2011)
8.	Undergraduate students who are nonresident aliens ^a	2%	2%	3%	3%	4%		6% (Fall 2011)	11% (Fall 2011)
9.	Graduate/professional students who are members of historically underrepresented groups ^{a9}	13%	13%	14%	15%	16%		17% (Fall 2011)	22% (Fall 2011)
10.	Graduate students who are nonresident aliens ^a	10%	12%	11%	12%	13%		12% (Fall 2011)	27% (Fall 2011)
11.	Average per-borrower cumulative undergraduate debt ^{c3}	\$18,410 (2009 grads)	\$21,367 (2010 grads)	\$20,835 (2011 grads)	Avail. 12/2012	Avail. 12/2013	<\$20,000	\$20,951 (2011 grads)	\$22,455 (2011 grads)
Challenge 3 – Lifelong Connection									
12.	Alumni giving participation rate: undergraduates with degrees ^d	22.4%	23.4%	23.9%	Avail. 9/2013	Avail. 9/2014	30% by 2014	22% (USNews)	35.3% (FY2011)
Challenge 4 – Business Plan									
13.	US News & World Report: Financial resources rank ^b	88	85	97	112	Avail. 9/2013	<70	53 (2011-12)	26 (2011-12)
14.	Total sponsored program expenditures (millions) ^a	\$50	\$54	\$57	Avail. 4/2013	Avail. 4/2014	\$60 by 2014	\$354 (2010-11)	\$121 (2010-11)
15.	Debt Service as Percent of Operating Expense ^f	4.9%	6.7%	5.9%	6.6%	Avail. 9/2013	<7%	Not available	Not available
16.	Annual Total Value of Private Gifts (in millions) ^{d6}	\$51	\$43	\$41	Avail. 9/2013	Avail. 9/2014	50	\$196 (2009-10)	\$167 (2009-10)
17.	Endowment per student ⁸	\$65,711	\$71,406	\$81,408	\$82,870	Avail 9/2013		\$195,175 (FY11)	\$298,425 (FY11)
Challenge 5 – Administrative Resources and Infrastructure									
18.	All E&G Facilities Condition Index ^{e5}	11.0%	7.6%	7.8%	6.3%	Avail. 2/2013	<10%	8.7% (2010-11)	Not available
Challenge 6 – Communications									
19.	US News & World Report: National Universities ^b (Ranking for year data collected)	33	31 (tie)	33 (tie)	33 (tie)	Avail. 9/2013		24 (tie) (2011-12)	15 (tie) (2011-12)
20.	US News & World Report: Public Universities ^b (Ranking for year data collected)	6	6	6	6	Avail. 9/2013		2 (tie) (2011-12)	34 Not applicable

Top-Level Dashboard Notes

+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

^a 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)

^b From US News & World Report: rankings published in September based on data submitted in previous spring. Reported for year data collected.

^c From Common Data Set (or institutional website, as available)

^d From Council for Aid to Education/Voluntary Support of Education

^e Calculated by facilities management for submission to State Council of Higher Education

^f Internal calculation using data included in the College's annual audited financial statements

^g From National Association of College and University Business Officers (NACUBO)

¹ Calculated by adding the 25th and 75th percentiles for Critical Reading and the percentiles for Math.

² Figures are estimates for current year or actual for previous year

³ 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

⁴ 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).

⁵ 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.

⁶ 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

⁷ Also includes race reported as unknown and non-resident alien

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

⁹ 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.



Macro Productivity Measures

W&M will continue to set the standard as the most efficient of the leading U.S. universities.

- According to *US News and World Report*, W&M is the most efficient of leading national universities – with the largest gap between quality and resources.
- From 2001 to 2012, educational and general spending per student increased by less than 1% per year when adjusted for inflation, an average growth of \$143.
- From 2008 to 2012, W&M reduced recurring baseline expenses by over \$9 million on main campus and over \$6 million at VIMS
- The Chronicle of Higher Education reported that W&M was the 5th most efficient university of its 25-member SCHEV peer group in educational spending per completion. On average, the peer universities spent more than **twice** as much per degree (in 2009-10).
- In our 25-school SCHEV peer group, only 3 have fewer executive, administrative and managerial employees per FTE
- We focus resources on the academic program. From 2003 to 2009 instructional spending increased by \$33.5 million, nearly 4.5 times the growth in administrative costs.



Current Initiatives

- Fall 2011, the Provost directed each dean to reallocate costs or increase net revenues cumulatively by 5% of their school's Education and General (E&G) budget over the next three fiscal years (FY13-15). These reallocation efforts, which will total \$5.8 million/year by the third year,
- November 2011, the Provost announced a Creative Adaptation Fund of \$200,000 for each of the next three years. Seven initial projects are underway.



Projects

Fall of 2010, developed projects to explore innovation and greater efficiency in all of the university's processes. 65 projects are underway. In FY12 those projects, generated over \$2 million per year.

- Net revenues increases (from new programs including the St. Andrews joint degree program, an armed services MBA, a legal advantage program for entering international students, and expanded pharmacy operations in the medical clinic. (Net increase of \$1.170 M in FY12)
- Cost savings from adjusting teaching loads in the school of business based on research productivity, expanding use of digital formats and reducing paper flows; reducing replacement rates, for example in computer leasing; bringing homecoming events back on campus and streamlining voting; deploying a voice over internet protocol (IP) unified communications system; and cutting operating costs by demolishing old buildings at VIMS. (Net savings of \$989 K in FY12)



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



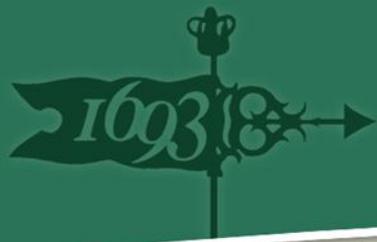
- Implement diversity action plans submitted by Deans in FY12.
- Actively promote Cohen Center services to alumni.
- Enhance alumni chapter engagement through increased partnership with the development office.
- Measure alumni engagement to enhance cultivation strategies.
- With the Real Estate Foundation, 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 = Performance + Productivity + Philanthropy + Public Support

- 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.
- Start implementation of 6-year plan including adjustments for actions taken by the General Assembly and Governor this spring.



Our Overarching Grand Challenge

The strategic plan identifies 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 change lives for the better by being 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. 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. Our special strength is **engaged learning**.



Engaged Learning is our Special Strength

Intense learning experiences at William & Mary **engage students in competing ideas through inquiry, research, experimentation and application.** Engaged learning requires students to challenge and debate ideas, take seriously views different from their own, and explore boundaries. Students actively embrace and wrestle with concepts and ideas.

We have small classes, close interaction between professors and students, and the intense experience of discovery through research and service. Engaged learning occurs in many forms from intimate freshmen seminars to participation in faculty-led programs, or service trips abroad, work in professors' labs or research programs, co-authoring papers with faculty mentors, and independent research projects.

These opportunities are not extras at William & Mary. They define education here. William & Mary prepares students to lead in whatever fields they enter, to thrive in a complex, changing world, and to make a difference in their communities, states and nations.



Four P's of the New Financial Model

We intend to build a financial foundation resting on the four P's:

- 1) Performance. Outstanding results worthy of support.
- 2) Productivity. Innovation, greater efficiency and 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) Philanthropy. Greatly enhanced philanthropy (annual giving, endowment, funds for bricks and mortar); and
- 4) Politics. Continued support of operations and capital projects by the state, with flexibility to take advantage of William & Mary's unique strengths, building on the principles of the restructuring legislation.



Highlights FY13 – Challenge 1

Challenge 1 –

- Ensure that faculty and staff salaries are competitive so we can attract, retain and motivate great people.
- Complete the review of the general education requirements and begin implementation of changes, building on the review of the liberal arts university in FY10 and the initial undergraduate curriculum discussions in FY11 and FY12.
- Complete the review of the faculty merit and reward system with particular emphasis on incentives for innovation.
- Explore the concept of a Center for Collaborative Teaching and Research to promote cross-school collaboration.
- Expand and enhance summer opportunities for study and research, both on campus, in DC and abroad.



Highlights FY13 – Challenges 2 and 3

Challenge 2 –

- Review school plans and provide appropriate university-level support, building on the establishment of a senior leadership position to coordinate and encourage our diversity efforts in FY10, the review of best practices in FY11, and the development of school-level plans in FY12,
- Continue support for the Lemon Project.

Challenge 3 –

- Continue the emphasis on lifelong connections by focusing on making homecoming even more engaging and linking alumni more closely to the Cohen Career Service Center, building on the work of the Lifetime Connections Committee established in FY10 which has already resulted in the re-alignment of Commencement and Charter Day in FY11 and the re-design of homecoming in FY12.
- Explore with the Real Estate Foundation opportunities for an addition 200+ bed student residence near campus, building on the opening of Tribe Square in FY12 and the new Fraternity Housing project already underway.



Highlights FY13 – Challenge 4

Challenge 4 –

- Build momentum for a future fund-raising campaign by providing planned expanded support for development operations, increasing gift levels, refining messages and communication platforms, and activating a volunteer network.
- Provide a \$200,000 per year Creative Adaptation Fund for three years beginning in FY13 to improve the quality of our educational programs, either directly or indirectly, by reducing costs or generating net new revenues and thereby providing funds that can be reinvested in people and programs.
- Reallocate costs or increase net revenues cumulatively by five percent of the FY12 E&G budget in each school over the next three-year period (FY13, FY14 and FY15) -- beyond any increase provided by state allocations or generated through undergraduate tuition.



Highlights FY13 – Challenges 5 and 6

Challenge 5 –

- Free up M&O funds through innovation and greater efficiency initiatives, completing the over 50 projects now underway and adding new projects as appropriate.
- Deploy software systems to enhance business practices, with priority to approved innovation and greater efficiency initiatives.
- Increase security presence on campus.
- In areas that overlap with Challenge 3, assess the current need for graduate student housing, refine the plan for more aggressively addressing problems of deferred maintenance in the residence halls, and raise funds for the Eco-Village.

Challenge 6 –

- Increase consistency in visual identity, including use of logos, marks and colors using the oversight process recommended by the Visual Identity Committee in FY12, to include deployment of a website with the approved materials.
- Strengthen the sense of community on campus through an internal electronic newsletter, replacing and streamlining other internal communication vehicles, as recommended in the FY12 internal communications review.
- Expand faculty access to national media coverage by deploying a studio with appropriate media links.