

Draft 09/13/19



WILLIAM & MARY ATHLETICS

TRIBE 2025

THE PATH FORWARD

William & Mary Athletics will achieve a new level of excellence by 2025, accomplishing bold goals for competitive success while sustaining high academic and ethical standards, raising school spirit, increasing national exposure, improving the student-athlete experience, and setting national standards in performance analytics. Following an extensive strategic review (see Appendix I) in 2018-2019, we have set a clear path for the next six years for academic excellence, competitive success, financial stability, enhanced student-athlete experience, uncompromising ethics, and state-of-the-art facilities.

By 2025, we will:

- Maintain the highest student-athlete graduation rate of any NCAA Division I public university;
- Significantly improve student-athlete support through the expansion of academic, high-performance, mental health and wellness support staff and facilities to help our student-athletes meet their full potential;
- Develop a nationally recognized program in sports performance analytics;
- Meet high standards for gender equity;
- Consistently rank as one of the top 100 NCAA Division I Athletic programs as measured by Director's Cup standings;
- Win at least 35 Colonial Athletic Association (CAA) team championships, including a combined total of 5 championships in the three most vital community building sports – football and men's and women's basketball;
- Set and meet aggressive goals for expanded philanthropic support;

- Continue to look forward, adapt to the rapid pace of change in NCAA athletics, identify new opportunities and align resources to meet our highest priorities;
- Re-brand W&M Athletics to reflect the dynamic changes in our programs and the high levels of excellence to which we aspire;
- Cultivate a spirit of inclusivity and belonging among student-athletes and their fellow students that celebrates the unique qualities of each member of the W&M community;
- Create game-day experiences for students and fans that reflect Tribe pride; and
- Upgrade facilities to allow our student-athletes to fully meet their potential and to provide a world-class game experience for fans.

Our goals are bold, unapologetically so. William & Mary is a university for the bold, one where the remarkable happens every day.

At William & Mary, we boldly pursue excellence in all that we do. Athletics is an integral part of the educational experience. A vibrant athletics program enhances the university's brand, increases diversity and provides powerful experiences for our student-athletes. A successful program attracts and develops elite student-athletes who become great leaders, friends and advocates for William & Mary. They learn to connect with others in innovative ways to overcome differences, to take risks and persevere through adversity with confidence. We produce champions of uncompromising character who make a positive impact in a complex and changing world.

Academic Excellence

Uncompromising ethical and academic standards are an essential part of the whole William & Mary experience. The Athletics program sets a national standard in this area. Tribe student-athletes excel as measured by the NCAA Academic Progress Rating (APR), the Federal Graduation Rate (FGR), the NCAA Graduation Success Rate (GSR), team grade point averages, and conference Scholar-Athlete awards. For example, the 2017 student-athlete Federal Graduation Rate (FGR) of 89.1% was the highest FGR among public universities for the 14th year in a row, 20 points above the NCAA Division I student-athlete average, first in the Colonial Athletic Association (CAA) and first in Virginia.

We will uphold and celebrate those standards and we will continue to hire staff who understand, respect and embrace them. As we elevate the Athletics program, we will continue to expand the support we provide to every student-athlete to enable each one to excel in the classroom as well as in the arena. For example, our current ratio of academic support staff per student-athlete is very low when benchmarked to our competitive peers, including other CAA programs.

By 2025, we will:

- Reach academic performance standards established for each team;
- Increase the academic staff ratio per athlete; and
- Maintain the highest student-athlete graduation rate of any NCAA Division I public university.

Competitive Success

As an NCAA Division I member, our aspiration to boldly pursue excellence in competition goes beyond local success and into competitive national success. We want our students to aspire to and meet great challenges in athletics just as they do in the classroom. We want them to do so while maintaining high standards of academic achievement, respect and integrity.

The competitive landscape within NCAA Division I programs is dynamic, and to remain successful William & Mary's athletic program must also adapt and be agile. Many schools have reduced the breadth of their programs to enable greater focus on competitive success for the remaining teams. Despite limited funding, William & Mary has worked hard to sustain a program with 23 varsity sports and over 500 student-athletes. Although Tribe teams and their supporters take understandable pride in the breadth of the program and the success that has been achieved in the past, the program has recently had less competitive success. Greater success in football and men's and women's basketball will be particularly important in building a closer community and expanding school spirit. Success in those three attracts fans, generates revenue for all sports, increases national recognition and expands the admissions pool. The importance of those sports could well shift in the future, but at the moment success in those three will lift the entire program.

William & Mary is committed to providing student-athletes access to NCAA championship competition. Students at William & Mary thrive on challenges, and they want to test themselves against the highest standards, in athletics and in academics. The Colonial Athletic Association (CAA) continues to provide the right fit for the university's Division I intercollegiate athletics goals, including providing the best access to NCAA postseason competition for many of our teams. Success in our high priority varsity programs in the CAA will help elevate the William & Mary brand and best position the university for the future of intercollegiate athletics.

W&M has had considerable success in the CAA in several sports, with 52 conference championships from 2008 through 2018. However, just three sports (men's and women's cross country and women's tennis) account for roughly half of those championships. More importantly, success in the vital community building sports has

been more limited, with football, men's basketball and women's basketball not winning a CAA championship in the last three years.

The standard for national intercollegiate athletics competitive success is the achievement of NCAA Division I Directors' Cup points, the most widely used measure of success at the NCAA championship level. Points are awarded for individuals and teams reaching and progressing in championship competition. There are roughly 350 NCAA Division I schools that compete for the Directors' Cup. W&M aspires to finish in the Top 100 schools each year, which normally requires earning approximately 188 points. In the last ten years, W&M has averaged 150 points and in the last five years, 130 points. Our most recent national rankings were 236th in 2016-17, 217th in 2017-18, and 219th in 2018-19. We must improve.

During work on this plan, Athletics hired new coaches in two key sports: Mike London for football and Dane Fischer for men's basketball. They were hired for their philosophies emphasizing both character building and competitive success. Their leadership will be important, and more resources will also be needed to reach our goals in those sports. Additional funding will be required to bring those programs and women's basketball up to the current resources available to the top teams in the CAA. Basketball will also require a new practice facility to ensure a competitive program.

Other sports within the Athletics department currently operate with scholarships well below levels permitted by the NCAA. The breadth of the program with 23 teams strains the level of academic, training and medical support that can be given to each student-athlete.

We want to build on the strong William & Mary brand and emphasize the key role of athletics as an important part of the university's holistic excellence. We are emphasizing that proud connection by branding the program as *William & Mary Athletics*. We will always be the *Tribe*, but we know that external audiences have a stronger recognition of the *William & Mary* brand. So, while we build Tribe pride, we will also promote *William & Mary Athletics*. In 2018, we began that shift and adopted a more dynamic athletics logo. In 2019, we teamed with University Advancement and University Communications to review our branding approach. Our next steps in that process will be new branding guidelines, including a dynamic brand manifesto, a message map tied to the strategic plan, and new visual guidelines for the use of images and colors, all captured to a new website design.

Competitive excellence is an important part of the game-day experience, and greater success on the fields and courts, particularly in football and men's and women's basketball, will continue to build community pride and increase momentum for the Athletics department and the entire university. In addition, we want to build a stronger connection between students, alumni, other fans and our teams.

By 2025, we will:

- Raise new funds and align resources to meet the academic, training and medical needs of our student-athletes;
- Consistently rank as one of the top 100 NCAA Division I Athletic programs;
- Win at least 35 Colonial Athletic Association (CAA) championships, including a combined total of 5 championships in the three key community building sports – football and men’s and women’s basketball;
- Continue to evaluate the structure of the Athletic program and adjust the scope as needed to meet those challenging goals; and
- Ensure that the William & Mary Athletics brand and the game-day experience of fans and supporters build Tribe pride and strengthen school spirit.

Financial Stability

The Athletics annual budget is just over \$28 million per year, fourth among the ten-member institutions of the CAA. But W&M supports more teams and over 30 percent more student-athletes than our CAA peers. As a result, our peers are spending, on average, 32 percent more per student-athlete than William & Mary. This imbalance creates serious gaps in funds available for student-athlete support (academic, compliance and high performance). By some estimates, the annual football budget at W&M is roughly \$1 million per year below the top four CAA programs, the gap in men’s basketball is about \$.8 million, and the gap in women’s basketball is roughly \$.2 million. In addition, most W&M teams are not able to offer the full number of scholarships permitted by the NCAA.

Over half of the department’s annual budget comes from student fees. There is a strong consensus across the university to limit and, if possible, avoid any further increases in such fees. About ten percent of the budget comes from admission and marketing revenues. Although there is potential to expand those revenues, increases in that area will largely depend on greater competitive success in the high-profile sports.

For the immediate future, expanded resources will have to come from increased philanthropy. Roughly one-third of the Athletics budget comes from gifts, including annual giving and endowment income. W&M Athletics donors demonstrate remarkable loyalty to — and pride in — the Tribe, and the number of overall donors has increased in each of the last ten years. About one-third of Athletics alumni donate to the Tribe Club each year, and they are also strong supporters of and leaders in other areas of the university. Closing key financial gaps, particularly as the university enters the final year of the *For the Bold* campaign, is critical to our success.

We recognize that competitive success in athletics is an engine for University Advancement. Success on the field goes hand in glove with fundraising success. Key steps include the addition of a new joint position with University Advancement to direct

the Athletics fundraising effort, and the addition of a position focused on revenue generation and oversight of all external operations related to marketing and branding. Those positions will generate momentum for key initiatives including a reorientation of annual giving, a major branding effort, coordinated outreach to potential donors including corporate sponsorships, and an expansion of Director of Athletics participation in individual and small group solicitations with major donors.

By 2025, we will:

- Set and meet aggressive goals for expanded philanthropic support;
- Significantly improve W&M Athletics' fundraising efforts;
- Invite a university discussion of a future mini-campaign focused on athletics after completion of the current *For the Bold* campaign; and
- Implement a multi-year budgeting process that systematically aligns our resources to the highest priorities.

Fulfilling Student-Athlete Experience

We are committed to providing an inclusive environment that helps student-athletes meet their full potential, including their mental, physical and emotional wellbeing. We are keenly aware of the need to expand support services for our student-athletes. The ratios of W&M staff to student-athletes are well below CAA peers, in large part because of the large number of teams and athletes in the W&M program.

Although we are known for our high student-athlete academic achievements, W&M Athletics is under-resourced in supporting those student-athletes to achieve their full potential. At this time, our ratio between academic staff and student-athletes places us last in the CAA. The rigors and time demands on our athletes require more strategic assistance in their course planning and balancing their training schedules with time for studying and leisure. We are proud of what our student-athletes have been able to achieve and we know that we have an obligation to do more. In "high performance," which includes sports medicine, athletics performance, sports psychology and nutrition, we currently have the second worst ratio in the conference. When it comes to the physical preparation of our athletes it is our duty to train them to be safe, robust and ready for practice and competitions.

W&M Athletics has already taken steps forward in student-athlete high performance. A team of professionals is in place, including a coordinator of data science, dedicated to an integrated, holistic approach to training and wellness. We want all student-athletes to graduate knowing they reached their full potential in the classroom and in competition. Incorporating the latest research is essential to allowing our student-athletes to achieve their optimal level of performance. The innovative program builds on growing university strength in data analysis and has the potential to set national standards for performance analytics.

As we strive to achieve gender equity and thereby increase opportunity for our female student-athletes, W & M will consider the potential addition of another women's sport at the varsity level. Any addition to W&M's varsity sports offerings, within current resources (e.g., financial, human, and facility) is a challenge. Therefore, as part of our continuous program review, W & M will conduct an analysis, including, but not limited to, the re-classifying an existing women's club program to varsity. This analysis would result in a recommendation by the end of 2020 for full implementation by 2025.

W&M intercollegiate athletics is part of a broad spectrum of sports opportunities at the university. Over 80 percent of all William & Mary students are involved in the university's recreation program which includes some 45 club sports, intramurals, and fitness and wellness activities. The sport clubs are run by students, under the supervision of the Vice President for Student Affairs, the Associate Vice President for Health and Wellness and the Director of Campus Recreation. Various W&M facilities are designated for primary use by either campus recreation or intercollegiate athletics.

As we move forward with our continuing analysis of our programs and reallocations of resources, it will become increasingly important to coordinate plans across the intercollegiate and university recreation programs. We will establish a single point of contact within Athletics to improve coordination with Student Affairs, explore potential synergies, and assess the full implications of any program adjustments.

By 2025, we will:

- Bring our academic, sports performance and sports medicine staff to student-athlete ratios up to the averages of the top four CAA programs;
- Meet national standards of distinction in performance analytics;
- Provide appropriate opportunities for women and men who want to compete at the intercollegiate level considering participation, facilities and student-athlete support;
- Adjust team rosters and funding to improve the balance of opportunity and support; and
- Complete assessments of the possibilities for potential addition of student-athlete opportunities for women.

Uncompromising Ethics

W&M Athletics exceeds high ethical standards for integrity, transparency and accountability. Any lapses would have serious implications for the program and the university. The reputation of the Athletics program has been exemplary, and we will sustain it unswervingly.

By 2025, we will:

- Enhance and expand the *Rules Compliance Education Program* by creating appropriate handbooks, conducting frequent education sessions, assigning clear reporting and monitoring responsibilities to ensure ongoing compliance with NCAA, Colonial Athletic Association and William & Mary rules and regulations.

Excellent Facilities

W&M has taken great strides in the past decade to provide NCAA Championship caliber facilities:

- The Jimmie Laycock Football Center provides a team locker room, training rooms and coaches' offices.
- The Martin Family Stadium for soccer and lacrosse includes a 1,000-seat pre-engineered bleacher with a brick façade, press box, restrooms and team rooms.
- The Zable Football Stadium underwent a dramatic reformation including the Smith-McGlothlin west stands (named for Hunter Jones Smith, James W. McGlothlin and Frances G. McGlothlin) adding an upper deck, ten luxury boxes, a new press box, and concession space.
- The Plumeri Indoor Baseball Practice Facility adjacent to the Plumeri Baseball Field provides 5,500 square feet of indoor practice space.
- The Busch Field Team Facility, primarily for use by the women's field hockey team, will include a locker room and rooftop patio. The women's lacrosse team will also benefit from access to the building during their fall practices and clinics at Busch Field.

Those improvements have been impressive and much more work remains. The 2015 W&M Master Plan calls for several additions to the athletic facilities including renovation of Kaplan Arena (formerly known as William & Mary Hall), the development of new track facilities at Dillard Complex and the construction of a new natatorium. The first two projects have been included in the university's six-year construction plan. In addition, construction of new outdoor tennis courts would be a logical alternative to resurfacing the current courts.

Kaplan Arena. Simply put, this is the most important priority for Athletics, as it serves as the home for William & Mary Athletics. Improvements to the building will impact every student-athlete, every sport and every staff member. The renovated facility will enhance the fan experience and serve as a venue for events such as concerts for all students and the broader community. By 2025, we will raise funds for and complete renovation of Kaplan Arena, including staff office space and student-athlete support areas. Every current team uses a part of the facility to train. The current facility is inadequate and fails to support the five sports that compete and practice there (volleyball, men's basketball, women's basketball and men's and women's gymnastics.) As an

interim step, we will immediately relocate gymnastics training to a superior off-campus facility.

McCormack-Nagelsen Outdoor Tennis Courts. The men's and women's tennis teams currently compete at the Millie West Outdoor Tennis Courts located adjacent to Kaplan Arena. Due to the storm drain run-off paths from campus, the infrastructure of the courts has been deteriorating over time. A resurface and stabilization of the current courts would be a costly project (\$1.75 million). Construction of new courts at McCormack-Nagelsen, a \$2.5 million project, would provide important upgrades and a better location close to existing locker rooms and offices. The project would provide our teams with Division I caliber courts and give our tennis programs the option to host the CAA conference tournament. Other community users of the indoor facility have expressed interest in outdoor courts as well, so there may be possibilities for joint fundraising.

Dillard Complex. This off-campus facility, along Ironbound Road, will become an important multi-sport practice and event center for the William & Mary community. The project will provide space for new fields and could include a locker room, training room, support space and track facilities. The university has included this project in its six-year capital plan. The project will include demolition of condemned brick buildings on the site to include space for athletic facilities.

Swimming natatorium. The swimming teams currently share space in the Recreation Center with recreational sports. The pool is not Olympic length and there is very limited spectator space. This project was included in the goals for the university's *For the Bold* campaign, but funds have not yet been identified. Without this project completion, it will be difficult to maintain an NCAA Division I program.

The university's current facilities master plan six-year plan includes moving the Kinesiology Department from Adair Hall to Integrated Science Center Four once ISC4 is completed. Adair Hall would then be renovated to become a support facility for recreational sports. Plans include restoring and rehabilitating the locker rooms, replacing the main gym and upgrading building systems. Although this will primarily benefit recreational sports, the additions will ease current pressure on all university athletic facilities.

GOALS, OBJECTIVES AND MEASURES OF SUCCESS

The *Athletics Strategic Plan: Tribe 2025* is part of a strategic management system that includes: alignment of incentives and resources with Plan priorities; evaluation of outcomes using objective measures of success; clear assignment of responsibilities; programmatic adjustments as needed; and periodic modifications to the Plan to reflect outcomes and new opportunities. The Athletics staff will develop annual steps to advance toward the 2025 objectives. Budgets and individual performance objectives will be aligned with the annual steps. Progress will be tracked using the William & Mary Athletics Scorecard.

Goal One: Academic Excellence

Recruit, retain and graduate student-athletes by providing the resources, mentoring and support to excel academically.

Objective 1: Recruitment. Recruit prospective student-athletes who are academically qualified and who will contribute to the competitive success of William & Mary Athletics:

- Achieve 75% of the incoming first year class fulfilling the foreign language proficiency requirement prior to arriving at William & Mary in order to provide more flexibility in academic scheduling;
- Achieve average incoming aptitude test scores in the mid-50% class range.
- Achieve 100% admissions approval for committee cases.

Objective 2: Academic Environment. Strengthen the academic environment as reflected in the NCAA Academic Progress Rate (APR), the NCAA Graduation Success Rate (GSR) and the Federal Graduation Rate (FGR) of William & Mary student-athletes by the 2019-2020 Academic Year and thereafter:

- Earn the NCAA Academic Based Revenue Distribution each year provided to universities meeting established student-athlete academic standards;
- Lead all public institutions in GSR;
- Rank nationally in the Top 15 of all institutions in APR, GSR and FGR.

Objective 3: Academic Awards. Expand and refine the *Academic Excellence Award Program* for William & Mary student-athletes:

- Sustain current levels of success in winning internal W&M academic awards.
- Lead the league in All-Academic CAA Awards annually;
- Earn at least four individual Academic All-America awards annually;
- Earn at least two NCAA Postgraduate Scholarships annually;
- Earn at least one International Fellowship every two years.

Goal Two: Competitive Success

Attract, recruit, develop and retain high-performing student-athletes, coaches, trainers and other professionals who demonstrate the ability and potential to win championships.

Objective 1: Sustained Success. Allocate resources and align incentives to teams and set priorities within each team to achieve success in the CAA as a springboard to NCAA post-season team and individual competitions. Develop clear goals and objectives for each head coach aligned with those objectives holding them accountable to the goals while maintaining high academic and ethical standards:

- Win at least 35 Colonial Athletic Association (CAA) team championships by 2025 including a combined total of 5 championships in the three most important community building sports – football and men’s and women’s basketball;
- Annually place in the top four teams in the CAA for each varsity sports program;
- Finish in the top 100 ranking in the Directors’ Cup annually;
- Fund select varsity sports programs’ budgets in the top quarter of the CAA.

Objective 2: Football and Basketball. Raise competitive success in football, men’s basketball and women’s basketball to the championship level being achieved in several other sports. Success in these sports is particularly important in strengthening the community, building school pride and generating revenue to help support the whole Athletics program:

- Increase annual funding to the level of the top three CAA programs;
- Provide appropriate basketball practice facilities as part of the renovation of Kaplan Arena.

Objective 3: Continuous Evaluation and Adjustment. Continuously evaluate the scope of the Athletics program to focus on excellence and improve alignment with university and department goals and the shifting NCAA Division I environment:

- Use the Working Group established in 2019 to continue to review the Department’s ability to sustain the current 23-sport program within current resources and develop plans for change if that is required;
- Educate the W&M community about the scope of the challenge;
- Make every effort to increase resources available and to align resources with top priorities;
- Make adjustments as needed to position the program for sustained success and meet the 2025 objectives.

Objective 4: Branding and Game Day Experience. Ensure that the William & Mary Athletics brand and the game-day experience build Tribe pride and strengthen school spirit:

- Create a new senior-level Athletics position responsible for revenue generation, branding, and public relations in 2019;

- Coordinate closely with University Advancement and University Communications to deploy a new brand campaign including guidelines, a dynamic brand manifesto, a new visual identity and a new website;
- Launch a comprehensive game-day review in 2019 to reimagine and transform the experience;
- Increase total spectator attendance across all sports by 5% each year.

Goal Three: Financial Stability

Support the strategic priorities of William & Mary Athletics by maximizing revenue opportunities and managing expenses:

Objective 1: Annual Giving and Endowment. Increase the *Annual Giving Fund* contributions to William & Mary Athletics from roughly \$4 million per year to \$5 million per year. Increase giving to the *Athletics Endowment* each year and create new athletics endowments supporting athletic scholarships, coaching and administrative positions and operating expenses. Align priorities with University Advancement:

- Establish a new Advancement-Athletics leadership position in 2019;
- Coordinate with Advancement to raise the profile of Athletics in the last year of the *For the Bold Campaign* and to identify big ideas for future campaigns;
- Increase Director of Athletics Town Hall and small group outreach visits;
- Define endowment needs required by sports to sustain competitiveness;
- Retain 90% of current donors annually;
- Increase new donors by 5% annually;
- Achieve 100% participation in student-athlete annual giving (e.g., Ten for the Tribe);
- Achieve 100% participation in staff giving annually;
- Increase donor visits by the Athletic Director and Senior Staff to 15 visits per month.

Objective 2: Marketing. Develop and implement a comprehensive *Sports Marketing Plan* that will increase ticket sales, concessions, parking, corporate sponsorships, licensing and merchandising to \$3 million per year by 2025:

- Create a new sports marketing position in 2019;
- Increase revenue from media rights/corporate sponsorships to \$750,000 per year;
- Set specific revenue targets for annual increases in each of the six revenue sports and track results.

Objective 3: Guarantees and Rentals. Develop and implement a strategic initiative to increase revenues through contest guarantees and facility rentals by a minimum of 10% each year starting in fiscal year 2020:

- Increase facility rentals from \$37,000 to \$75,000 annually;

- Set minimal game guarantee requirements for Football, Men’s Basketball, and Women’s Basketball, totaling \$700,000 annually by fiscal year 2021.

Objective 4: Financial Model. Develop a five-year financial model that reflects the current base-operating budget and incorporates the goals and objectives of this strategic plan:

- Shift toward less dependence on student fees as part of the overall Athletics Budget; at a minimum, reduce the dependence on fees from 54% to 50% by 2025;
- Collect and assess data from CAA peers on expenditures by team and on overall salaries, operating expenses, and staffing;
- Improve tracking of the Athletics *Reserve Fund* in collaboration with the Vice President for Finance & Administration.

Objective 5: Operating Efficiency. Review and adjust the departmental structure and operations to align incentives and resources to the highest priorities:

- Complete a review of personnel positions in 2019-2020, align senior staff responsibilities with the priorities outlined in this plan, consolidate staff positions where possible and streamline reporting lines;
- Complete an operational review in 2019-2020 in conjunction with the university’s Business Innovation initiative to identify opportunities to streamline operations and increase efficiency;
- By 2025, identify \$500,000 in savings per year with \$50,000 of those savings added to the reserve fund and \$450,000 shifted to high priorities.

Goal Four: Fulfilling Student-Athlete Experience

Provide resources, programming and an inclusive environment in which all William & Mary student-athletes can reach their full potential.

Objective 1: Student-Athlete Support Services. Lower the ratio of academic, performance and sports medicine support staff to the level of the top four CAA programs. Establish a level of support that will be provided to student-athletes on all teams and allocate additional services based on priority assessments:

- In 2019-2020, create a student-athlete “Bill of Rights” that establishes a level of support that will be provided to student-athletes on all teams, and meet that standard by 2021-2022;
- By 2025 achieve a ratio of student-athlete participants to staff as follows:
 - 90-to-1 for academic support;
 - 90-to-1 for sports performance; and
 - 35-to-1 for sports medicine.

Objective 2: Performance Analytics. Develop a nationally recognized program for athletic performance analytics, including an emphasis on student-athlete safety, building

on the team of professionals now in place and the expanding programs in data analytics across the university:

- Complete a performance analysis in 2019-2020 of women's lacrosse in partnership with the Department of Computer Science and publish the results;
- Establish a program and raise funds by 2020-2021 to collect valid, reliable objective data from football and men's and women's basketball and football, analyze the results in partnership with the Department of Computer Science and the Mason School of Business. Provide initial analysis of men's basketball by 2021-2022;
- Aggressively seek sustained funding to endow the program by 2025 to include an additional full-time Ph.D. in artificial intelligence, data acquisition staff, an appropriate data management system and state-of-the art technology.

Objective 3: Gender Equity. Provide appropriate opportunities for women and men who want to compete at the intercollegiate level considering participation, facilities and student-athlete support:

- Adjust team rosters and funding to improve the balance of opportunity and support across men's and women's teams, reducing the size of the participation gap each year;
- In 2020-2021, review progress and develop a *Gender Equity Plan* with intermediate goals to be accomplished by 2025 and a timeline for full implementation;
- Expand education and training on gender equity issues through annual workshops for student-athletes and staff and appropriate briefings for the Board of Visitors and other advisory boards.

Objective 4: Club Sports. Sustain close collaboration across the Athletics and Campus Recreation programs:

- As part of continuing Athletics program review, consider the potential addition of another women's sport. This would include, but not be limited to, the analysis of re-classifying an existing women's club program to varsity. This analysis would be done collaboratively with Campus Recreation and would result in a report on the viability and sustainability of such a program and recommendation by the end of 2020;
- In 2019-2020, establish a single point of contact within Athletics for coordinating with the Campus Recreation program.

Objective 5: Student-Athlete Development. Enhance student-athlete life skills, inclusivity, leadership and career readiness:

- Continually refine, in collaboration with university Student Affairs, the student-athlete development curriculum provided to all student-athletes. As part of that effort, in 2019-2020, appoint an associate director to coordinate a new student-

athlete leadership development program, research appropriate curricula, and phase in full implementation by 2021-2022;

- Establish minimum annual class completion requirements for student-athletes and coaches including 100% compliance with NCAA standards;
- Conduct annual survey reviews of the program and make adjustments as needed. Achieve at least 75% satisfaction of programming on surveys.

Goal Five: Uncompromising Ethics

Create and sustain an environment that strives to always do the right thing with transparency and accountability.

Objective 1: Compliance: Continually review and enhance the institution's Compliance Program to ensure ongoing compliance with NCAA, CAA and William & Mary rules and regulations:

- Expand the department's NCAA education program for student-athletes, coaches, staff, university officials, donors and representatives of athletics interests. In 2019-2020, establish annual schedules and curricula for each group and track annual implementation:
- Enhance the compliance monitoring system to improve tracking against NCAA, CAA and William & Mary rules and regulations. In 2019-2020, develop a zero defects and immediate reporting scorecard for key rules and regulations, and track compliance against a zero-defects standard.

Objective 2: Policy and Procedure Manuals. Continuously revise and enhance the department's policy and procedures manual to improve transparency, efficiency, and accountability:

- In 2019-2020, create a working group to conduct a comprehensive review of current departmental policies and establish a roadmap for complete review, rewrite and update of policies. Track annual achievement of the roadmap objectives:
- In 2020-2021, unit leaders will complete, with staff assistance, procedure manuals for each policy in their unit. Unit leaders will then track annual adherence to the procedures.

Goal Six: Excellent Facilities

Provide NCAA Championship caliber facilities to build and sustain winning teams that will enrich the stakeholders' experience.

Objective 1. Kaplan Arena. Create an appropriate home for William & Mary Athletics. Renovate the arena, including the addition of a new basketball practice facility and space for academic support, sports medicine and compliance:

- Move gymnastics training to an off-campus facility in 2019;
- Complete design and raise funds for the renovation by 2021;

- Complete the renovation by 2025.

Objective 2. Dillard Complex. This area is off-campus along Ironbound Road. The project will include demolition of condemned brick buildings on the site to include space for athletic facilities. It will become an important multi-sport practice and event center for the William & Mary community. The project will provide space for new fields and could include a locker room, a training room, support space and track facilities. The university has included this project in its six-year capital plan:

- Continue to seek funding for this program as a university priority through the university's six-year capital plan;
- Phase in implementation by 2025 as funds permit.

Objective 3. McCormack-Nagelsen Outdoor Tennis Courts. Construct new courts at McCormack-Nagelsen, a \$2.5 million project, to put our tennis programs in a more desirable location, close to their locker rooms and close to their current offices. Other community users of the indoor facility have expressed interest in outdoor courts as well, so there may be possibilities for joint fundraising. The project would provide our teams with Division I caliber courts.

ATHLETICS STRATEGIC PLAN 2025 SCORECARD

The Scorecard reports progress in the academic excellence, competitive success, financial sustainability and student-experience goal areas using objective criteria specified in the plan. The matrix provides data for each measure in each of the past five years, summary five-year averages, and comparisons with the targets identified in the plan. The Scorecard includes comparisons using publicly available data with two other CAA programs, one in Virginia and one private, just for illustrative purposes. The Director of Athletics will use the Scorecard to focus Athletics staff on priorities in the plan, track progress, communicate with the Board of Visitors and other groups, and align resources to achieve the ambitious 2025 targets.

Academic Excellence	
1	NCAA Academic Progress Rate (APR)
2a	Federal Graduation Rate (FGR) Single Cohort Year
2b	Federal Graduation Rate (FGR) Four-Class Average
3	Graduation Success Rate (GSR)
4	Overall Grade Point Average (GPA)
5	CAA Commissioner's Academic Awards Rank
Competitive Success	
6	NCAA Division I Directors' Cup Points
7	NCAA Division I Directors' Cup Rank
8	Total CAA Team Championships
9	CAA Championships in Football and Men's/Women's Basketball
10	Percent of NCAA Permitted Scholarships Available
11	Ticketed Spectator Attendance
Financial Stability	
12	Number of Student-Athlete Participant Opportunities
13	Total Athletics Budget (million \$)
14	CAA Rank in Spending per Student-Athlete Participant Opportunities
15	Student Fee Percent of Budget
16	Marketing and Ticketing Sales (million \$)
17	Giving to Annual Fund (million \$)
18	Athletics Endowment
19	Increase in Annual Donors (percent)
Fulfilling Student-Athlete Experience	
20	Ratio of Student-Athlete Participants per Academic Support Staff
21	Ratio of Student-Athlete Participants per Sports Performance Staff
22	Ratio of Student-Athlete Participants per Sports Medicine Staff
23	Female Student-Athlete Participation Rate (percent)

APPENDIX I: STRATEGIC REVIEW 2018-2019

Director of Athletics Samantha K. Huges, joined the Tribe in May 2017 and launched a strategic review in January 2018 aimed at achieving and sustaining a level of excellence in athletics commensurate with the university's academic excellence. The Department engaged nationally respected experts, the PICTOR Group, to facilitate the first phase of the review, which included the following: an environmental scan of major issues confronting intercollegiate athletics; an assessment of William & Mary strengths weaknesses, opportunities and threats (SWOT); a survey resulting in more than 1,400 responses from student-athletes, athletic staff and university leadership; more than 40 in-person interviews with senior university administrators, athletic department staff, coaches, student-athletes and alumni; and an initial data-based scan of program performance.

Drawing on those results, Athletics adopted a new vision, mission, core values and goals (Appendix II) to guide further review and the ultimate development of the strategic plan. The vision, mission, core values, and goals were presented to the Board of Visitors in open session on September 27, 2018, and to the William & Mary Foundation Athletics Subcommittee on October 18, 2018.

The 2018 strategic review noted that William & Mary Athletics has achieved good results in many areas. But the PICTOR Group also concluded that the "current organizational structure of 23 varsity sports and financial model is not sustainable," and that "William & Mary must make decisions on the size and scope of its athletics program." The review indicated that progress in athletics would depend upon a combination of increased athletic-generated revenues, reallocation of operating budgets and increased philanthropic support. And specifically, the three most impactful community building and revenue-producing sports – men's basketball, women's basketball and football – need greater emphasis to maximize their potential for the department and university.

In December 2018, W&M Athletics launched a focused and data-driven assessment process to build on the initial work in the first phase of strategic review and determine concrete steps required to sustain excellence across the athletics programs in the six goal areas. The Director established and led a small Working Group (Appendix III), which assembled the required data, developed assessment criteria and considered options. In January 2019, President Katherine Rowe established a Review Group (Appendix III) to serve as a sounding board for the Working Group and to provide reactions and recommendations as the work moved forward. Her charge noted that W&M's bold pursuit of excellence is vital to our future:

We strive for excellence in every area we choose to pursue at William & Mary. A vibrant athletics program enhances the university's brand, increases diversity and provides powerful experiences for our student-athletes. A successful program attracts and develops wonderful student-athletes who disproportionately become great leaders, friends and champions of William & Mary. We boldly pursue excellence in athletics as part of the university's holistic excellence.

Through the spring of 2019, the Working Group reviewed the Athletics program and evaluated alternatives. The Group assembled available data for each W&M team for each of the goals – academic excellence, competitive success, financial stability, uncompromising ethics and excellent facilities. The matrix also included available information for three teams offered in the CAA but not at W&M – men’s lacrosse, women’s rowing and women’s softball. The matrix contained over 650 data elements. The Group assessed the implications for various program adjustments, discussed them in a series of meetings with the Review Group and the President’s Executive Leadership Team, and developed a communications plan to inform the community about the ongoing review work. In late April, the Director discussed with the Board of Visitors plans for the evolution of the Athletics strategic plan and its release in early fall, and reviewed those plans with the William & Mary Foundation Board in early May.

In April, the Working Group began drafting the Athletics Strategic Plan 2025; in May, the Director reviewed the draft with her senior leadership team, and in June the conversation expanded to coaches and other Athletics staff. In early July, the Director discussed the draft plan with the Review Group and in late July she discussed the main themes with the Board of Visitors. In August, the Director presented the draft plan to the President to ensure consistency with the university’s strategic planning process.

The 2018 strategic review confirmed the university’s commitment to excellence in athletics. That had also been a theme in the 2006 report “The Game Reclaimed,” and the more recent 2015 “Report of the Committee on Competitive Excellence.” The 2006 report emphasized the importance of retaining an appropriate emphasis on academics as well as competitive excellence and argued that William & Mary had the right student-athlete balance. The 2015 report noted that competitive excellence had declined, and that a large infusion of philanthropy was needed to support the wide range of athletic teams and provide championship experiences for players and fans. The 2018 review addressed the reality that the student-athlete experience had declined, competitive results were below expectations, student-athlete support services were insufficient and noted gender equity imbalances.

The review concluded that in order to achieve a level of excellence comparable to the level of excellence the university achieved in academics, the Athletics program would have to focus resources and leadership efforts in the areas of highest priority. The review also noted the need for continuous review and adjustment opportunity to adapt to changes in the structure of NCAA division I programs across the country.

The review underscored the commitment to finishing consistently in the CAA top three in select sports as a springboard to NCAA championship competition, so W&M could reach the target of finishing in the top 100 Division I schools in the Director’s Cup each year. The review called for an increase in resources for the three key highly visible, higher-revenue, community-building sports – men’s and women’s basketball and football. The review also noted the need to raise the base level of support for all student-athletes in sports medicine, academic support, training and conditioning, and nutrition counseling

and sports psychology. The review called for enhanced emphasis on gender equity. Those themes became the pillars of the strategic plan.

APPENDIX II: VISION, MISSION, CORE VALUES, AND GOALS

Vision

William & Mary Athletics will boldly pursue excellence.

Mission

Athletics is an integral part of the educational experience at William & Mary. Our responsibility is to deliver a holistic experience with high standards of performance; providing an environment where champions of uncompromising character, fully engaged with campus and the community, prepare to make a positive impact in a complex and changing world.

Core Values

Accountability:	We take ownership and responsibility for our actions.
Belonging:	We welcome, respect and value individual differences while providing a safe, healthy and inclusive environment in which all have the opportunity to thrive.
Creativity:	We foster a spirit of collaboration and curiosity to achieve creative and ingenious solutions.
Integrity:	We do the right thing, always.
Service:	We give of ourselves for the benefit of others.

Goals

One: Academic Excellence

Recruit, retain and graduate student-athletes by providing the resources, mentoring and support to excel academically.

Two: Competitive Success

Attract, recruit, develop and retain high-performing student-athletes who demonstrate the ability and potential to win championships.

Three: Financial Stability

Support the strategic priorities of William & Mary Athletics by maximizing revenue opportunities and managing expenses.

Four: Fulfilling Student-Athlete Experience

Provide resources, programming and an inclusive environment in which all William & Mary student-athletes can reach their full potential.

Five: Uncompromising Ethics

Create and sustain an environment that strives to always do the right thing with transparency and accountability.

Six: Excellent Facilities

Provide NCAA Championship caliber facilities to build and sustain winning teams that will enrich the stakeholders' experience.

APPENDIX III: WORKING GROUP, REVIEW GROUP, SENIOR ATHLETICS STAFF

Working Group Members

Samantha K Huge, Director of Intercollegiate Athletics, *Chair*

Chelsey Burk, Deputy Director of Athletics

James Golden, Ph.D., Senior Consultant for Special Projects, Office of the President, retired W&M Vice President for Strategic Initiatives

Jeremy Martin, Ph.D. '12 M.B.A. '17, Chief of Staff, Office of the President

Review Group Members

Kendrick Ashton, Jr. '98, former Board of Visitors member, football alumnus, Co-Founder & Managing Partner – St. James Group

Donald Beck '64, W&M Annual Giving Board of Directors

Mark Boddy '87, Former Tribe Club President, basketball alumnus, Northwestern Mutual

John Donahue, Ph.D., Faculty Athletics Representative, Associate Professor of Classical Studies and Arts & Sciences Dean for Education Policy

Maryellen Farmer Feeley '85, W&M Foundation Athletics Sub-Committee Chair, field hockey alumna

Debra Hill, former W&M women's volleyball head coach, parent of field hockey alumna

Andrew Horrocks '87, Trustee of the W&M Foundation, W&M New York Regional Campaign Committee, track & field alumnus, former Managing Director of Credit Suisse (investment banking and capital markets division)

David N. Kelley, Esq. '81, W&M Foundation Board Athletics Subcommittee Vice Chair. Partner – Dechert, LLP

Shawn Knight '94, member of the recent football coach advisory group, football alumnus, Assistant Director-Virginia High School Sports League

Lisa E. Roday, Esq., BOV Student Experience Committee Vice-Chair, BOV Executive Committee

Terry Thompson, '67, former Annual Giving Board Chair, W&M Foundation Board, Muscarelle Foundation Board, Raymond A. Mason School of Business Foundation Board, basketball alumna

H. Thomas Watkins III '74, BOV Student Experience Committee Chair, BOV Committees on Institutional Advancement and Financial Affairs, former Vice Rector and Chair of the Presidential Search Committee

Senior Athletics Staff

Chelsey Burk, Deputy Director of Athletics

Tiffany Christian, Senior Associate Athletics Director - Student Services/ Senior Woman Administrator

Aimee Clark, Chief of Staff / Coordinator of Athletics Strategies

Pete Clawson, Associate Athletics Director - Media Relations & Strategic Communications

Kevin Dwan, Senior Associate Athletics Director - Revenue Generation & Brand Management

Peel Hawthorne, Senior Advisor to Athletics

Anthony Henderson, Senior Associate Athletics Director / Executive Director of Athletics Advancement

Erik Korem, Senior Associate Athletics Director - Student-Athlete High Performance

Jason Simms, Associate Athletics Director - Student Engagement, Alumni Relations & Recruiting

Note: William & Mary Athletics recognizes the contributions of the following former employees to this review and planning: Steve Cole, Bobby Dwyer and Julia Martin.