

CELEBRATING TRADITION & FORGING CHANGE:

AN EVOLVING PLAN FOR WILLIAM & MARY

September 2010

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.

WILLIAM & MARY

A LIBERAL ARTS UNIVERSITY OF
COMPELLING ACADEMIC DISTINCTION

Major Strategic Planning Achievements So Far

- Alignment around our Vision
- W&M as a Leading Liberal Arts University – Our special sauce is engaged learning. White Paper -- Foundation for Curriculum Review
- Welcoming Campus – Even more diverse; Better communication about the campus today; Established position of Assistant to the President for Diversity and Community Initiatives; Launched the Lemon Project
- Increased Emphasis on W&M as a Lifelong Experience – Events, Communications, VP Level Committee, Coronation Day (admitted students linked to alumni)
- Foundation for New Financial Plan – Communication, Options, Timing
- IT Upgrades as a Platform for Greater Efficiency
- Sustainability Initiatives -- Largest campus-wide committee (more than 100), recycling, new “eco village,” moving up in most green rankings
- Communications Reorganization and Coordination Across Campus

Status of FY10 Implementation Steps

Of the 105 implementation steps for FY10, we had planned to complete or incorporate into continuing practice 72 and continue 33 into FY11.

- 26 have been incorporated into continuing practice
- 39 are complete
- 40 continue into FY11

The FY11 plan includes 77 new steps that we have now begun to track.

Challenge 1: Be a leader among liberal arts universities

- **Begin a review of the undergraduate curriculum (Halleran, Deans, Appropriate Faculty Committees)***
- Carry out a review of the merit and promotion systems and related incentives. (Halleran, Appropriate Faculty Committees)*
- Ensure faculty and staff compensation is competitive. (Halleran, Jones)*
- Create a fund to provide competitive startup packages in all disciplines. (Halleran, Jones)*
- Ensure graduate and professional stipends are competitive with peer programs. (Halleran, Jones)*
- Increase library support based on needs assessment. (McCarthy, Halleran)*
- Increase support and provide incentives for innovative and collaborative teaching and research. (Halleran, Deans)*

*** Continues into FY12-15**

Challenge 2: Build and support a more fully diverse W&M community.

- **Begin a formal review, internally and externally, of best practices that provide synergy for broad based university-wide diversity initiatives.* (Glover)**
- Support the Lemon Project Committee in its efforts to carry out the research project aimed at understanding the history of African-Americans at the College and in the greater Williamsburg community. (Halleran, Glover)
- Review the information on the W&M Website to assess the messaging of diversity at W&M. (Golden, Glover)
- Encourage opportunities for faculty development projects that enhance diversity in the curriculum, including assisting faculty with practices that best promote the exploration of diverse experiences. (Halleran, Deans, Appropriate Faculty Committees)
- Encourage a review of the undergraduate curricula in A&S, Business and Education with a focus on the strength of diverse curricular offerings and ways of teaching. (Halleran, Deans, Appropriate Faculty Committees)

*** Continues into FY12-15**

Challenge 3: Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M.

- **Continue to implement "W&M for a Lifetime" campaign; leverage the opening of the Cohen Career Center. (Coordinating Group)**
- **Collaborate with the Real Estate Foundation to open Triangle apartments on Richmond Road. (Ambler, Buchanan)**
- **Continue developing plans to design and construct housing (200-250 bed spaces) on campus that will enhance the residential experience of students in the Greek-letter community. (Ambler, Martin, Jones)**
- Articulate the elements of our collective identity that can be used to strengthen the William & Mary Community. (Reveley, Halleran, Cottrell, Faculty Assembly)
- Propose, support and implement innovative strategies for expanded student leadership development. (Ambler)

Challenge 4: Implement a new financial model that can fund our aspirations.

- **Increase alumni giving participation rates and overall annual and endowment giving by 1) strategic investment in fund raising and development opportunities, and 2) continued restructuring of development operations consistent with performance metrics and fundraising goals. In concert with the Board of Visitors and the Foundation Board, settle on the nature and timing of our next fund-raising campaign. (Pieri)**
- **Complete evaluation of market-based tuition options. Continue the planning, communications and politics essential to build a new, sustainable financial foundation for William & Mary. Develop implementation schedule in cooperation with the College's Board of Visitors. (Reveley, Halleran, Jones)**
- **Develop an effective process to pursue increased productivity in all parts of the university. (Reveley)**
- Complete the on-going study of faculty compensation competitiveness, establish appropriate targets, and make substantial progress toward these targets by 2015.
- Implement the compensation elements of the University HR system, periodically update market information, and make substantial progress toward these targets by 2015.

Challenge 5: Provide the administrative resources and infrastructure required for a university in the 21st Century.

- **Establish a competitive investment fund for resources that leverage efficiencies. (Jones, Martin)**
- Develop and issue request for information (RFI) for new private branch exchange (PBX) and voice mail systems. (Carpenter)
- Develop a 10 year phased implementation plan to fund the baseline maintenance budget of 2.5% of current present value (CPV) of facilities and utility infrastructure. (Martin, Jones)
- Complete risk management assessment policies and procedures and begin assessments. (Martin)
- Develop carbon-footprint reduction plan for 2011-2030. (Martin)

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

- **Increase coverage of research, scholarship and creative activities in targeted media. (Golden)**
- Complete an inventory of iconic images, logos and other marketing and visual representations of W&M and identify issues to be resolved. (Golden)
- Work with units as requested to create/update marketing plans and promotional materials. (Creative Services)
- Using the structure developed in FY10, complete annual President's communication plan and the W&M communication plan by August 2010. (Golden)
- Implement recommendations from the internal communications review group as appropriate. (Golden)

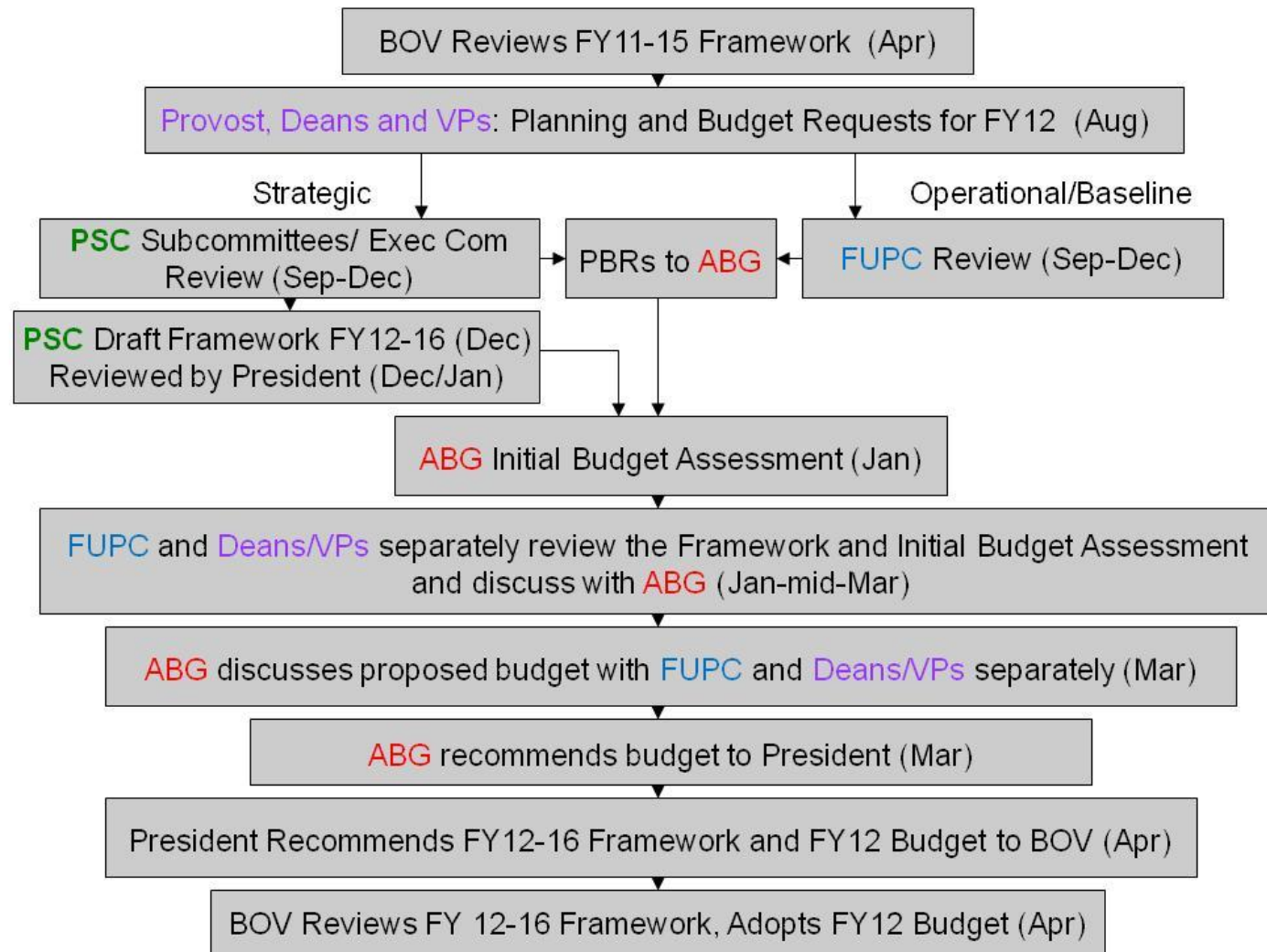
Top Level Dashboard – September 2010

Measures+	W&M 2005-06	W&M 2006-07	W&M 2007-08	W&M 2008-09	W&M 2009-10	Target	UVA* ** (2009-10)	Brown* ** (2009-10)
Challenge 1 – Leading Liberal Arts University								
1. Undergraduate acceptance rate ^a	31%	32%	34%	34%	34%	34%	32%	11%
2. Undergraduate yield rate ^a	41%	39%	37%	35%	34%	34%	48%	54%
3. Undergraduate Middle 50% SAT score range ^{b1}	1260-1440	1240-1440	1250-1450	1250-1440	1240-1450	1250-1450	1230-1440	1320-1530
4. Undergraduate graduation rates ^a	91%	91%	91%	91%	91%	93%	93%	95%
5. Student : faculty ratio ^{b2}	11:1	11:1	11:1	11:1	12:1	<13:1	16:1	9:1
6. Undergraduate small class percentage (2-19 students) ^b	47%	47%	49%	45%	48%	50%	52%	70%
Challenge 2 – Diversity								
7. Undergraduates who are members of race/ethnic minority groups ^{a9}	18%	20%	20%	22%	23%		26%	33%
8. Graduate/professional students who are members of race/ethnic minority groups ^{a9}	12%	13%	13%	13%	13%		13%	20%
9. Average per-borrower cumulative undergraduate debt ^{c3}	Not available	Not Available	\$15,602	\$16,765	Avail. 1/2011	<\$20,000	\$19,016 (2008-2009)	\$19,390 (2008-2009)
Challenge 3 – Lifelong Connection								
10. Alumni giving participation rate: undergraduates with degrees ^d	26%	24%	21.9%	22.4%	23.4%	30% by 2014	23% (USNews)	34.9% (2008-09)
Challenge 4 – Business Plan								
11. US News & World Report: Financial resources rank ^b	111	106	111	88	85	<70	64	27
12. Total sponsored program expenditures (millions) ^a	\$49	\$50	\$50	\$50	\$54 (estimated) Avail. 1/2011	\$60 by 2014	\$319 (2007-08)	\$104 (2007-08)
13. Debt Service as Percent of Operating Expense ^f	4.4%	4.4%	4.2%	4.6%	4.1%	<7%	Not available	Not available
14. Annual Total Value of Private Gifts (in millions) ^{d5}	\$49	\$49	\$35	\$51	\$43	50	\$239 (2008-09)	\$193 (2008-09)
Challenge 5 – Administrative Resources and Infrastructure								
15. Academic Facilities Condition (Ratio of Deficiencies to Replacement Value) ^{e5}	n/a	13.6%	12.4%	11.0%	7.6%	<10%	10.1%	
Challenge 6 – Communications								
16. US News & World Report: National universities ^b	31	33	32	33	31 (tie)		25 (tie)	15 (tie)
17. US News & World Report: Public universities ^b	6	6	6	6	6		2 (tie)	Not applicable

Preliminary Reference Table – September 2010

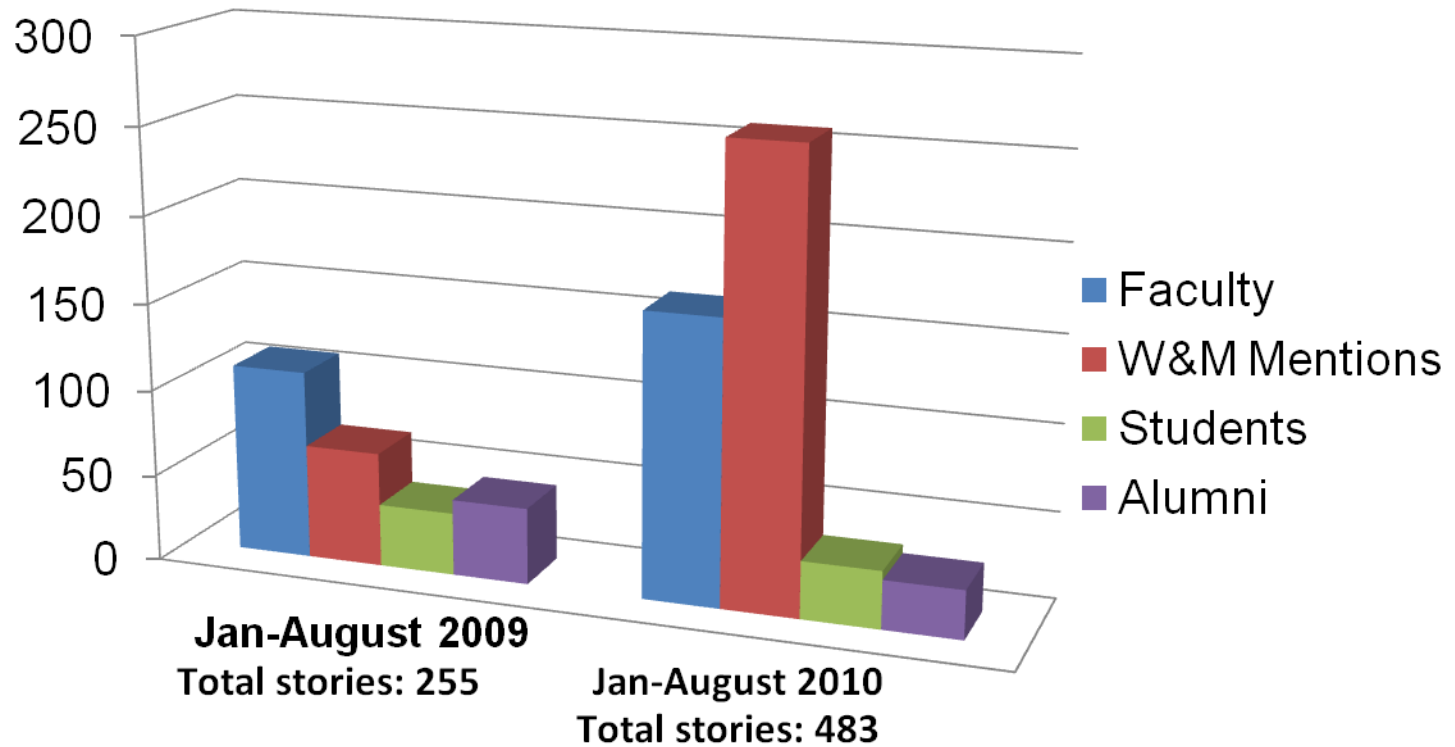
Measures+	W&M 2005-06	W&M 2006-07	W&M 2007-08	W&M 2008-09	W&M 2009-10	UVA* ** (2008-09)	Brown* ** (2008-09)
1. Undergraduate degrees awarded ^a	1,384	1,376	1,454	1,461	1,450	3,560	1,443
2. Graduate/professional degrees awarded ^b	711	728	722	800	796	2,702	672
3. Operating Expenses Provided by the State ^a	21%	23%	18%	18%	14% (estimate) Avail. 10/2010	8% (2007-08)	Not applicable
4. Core Expenditures per FTE Student ^{a4}	\$30,366	\$30,598	\$36,198	\$35,891	Avail. 5/2011	\$49,456	\$67,161

W&M Planning and Budgeting Process 2010-2011

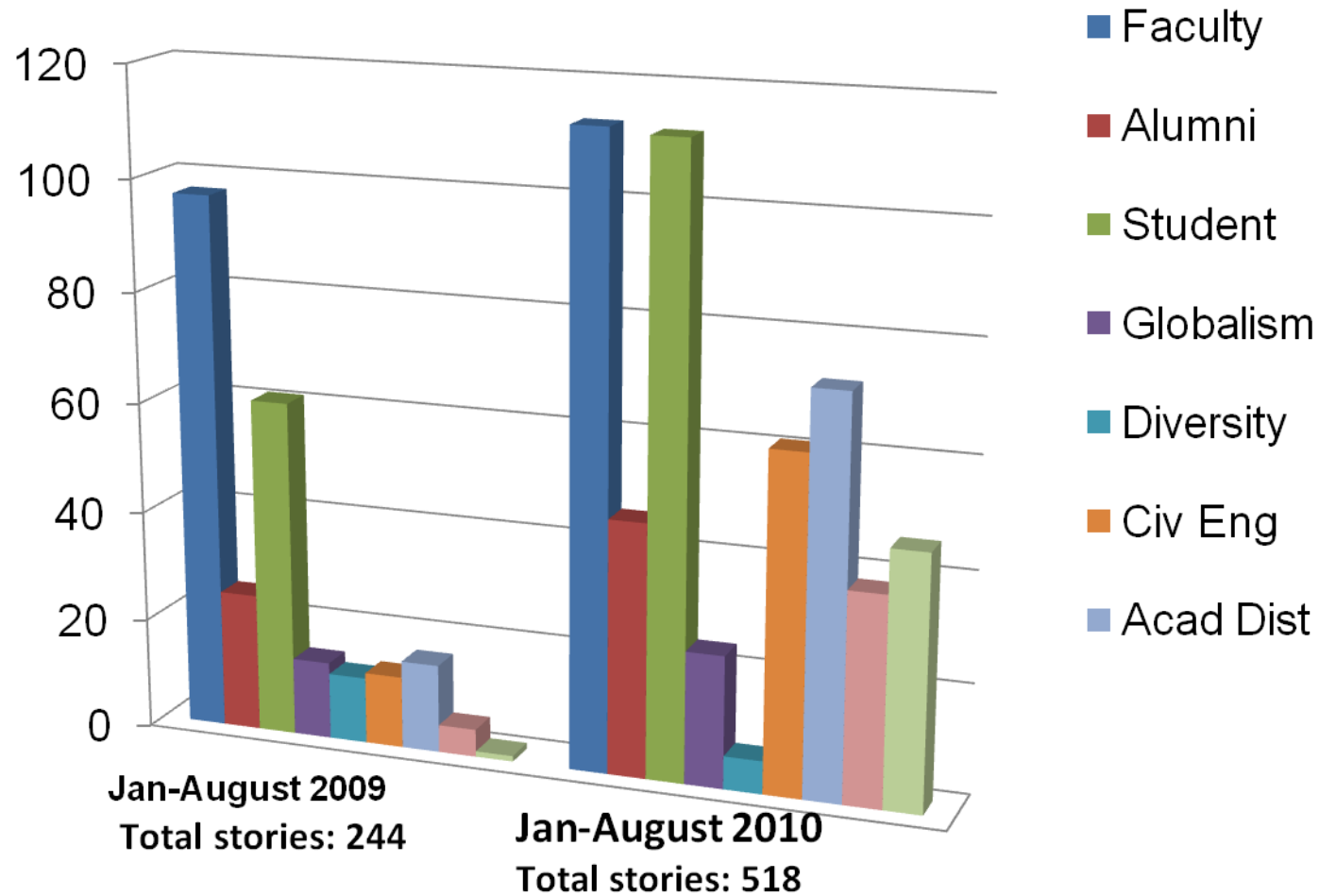


ABG – Administrative Budget Group
FUPC – Faculty University Priorities Committee
PSC -- Planning Steering Committee

National Media Coverage

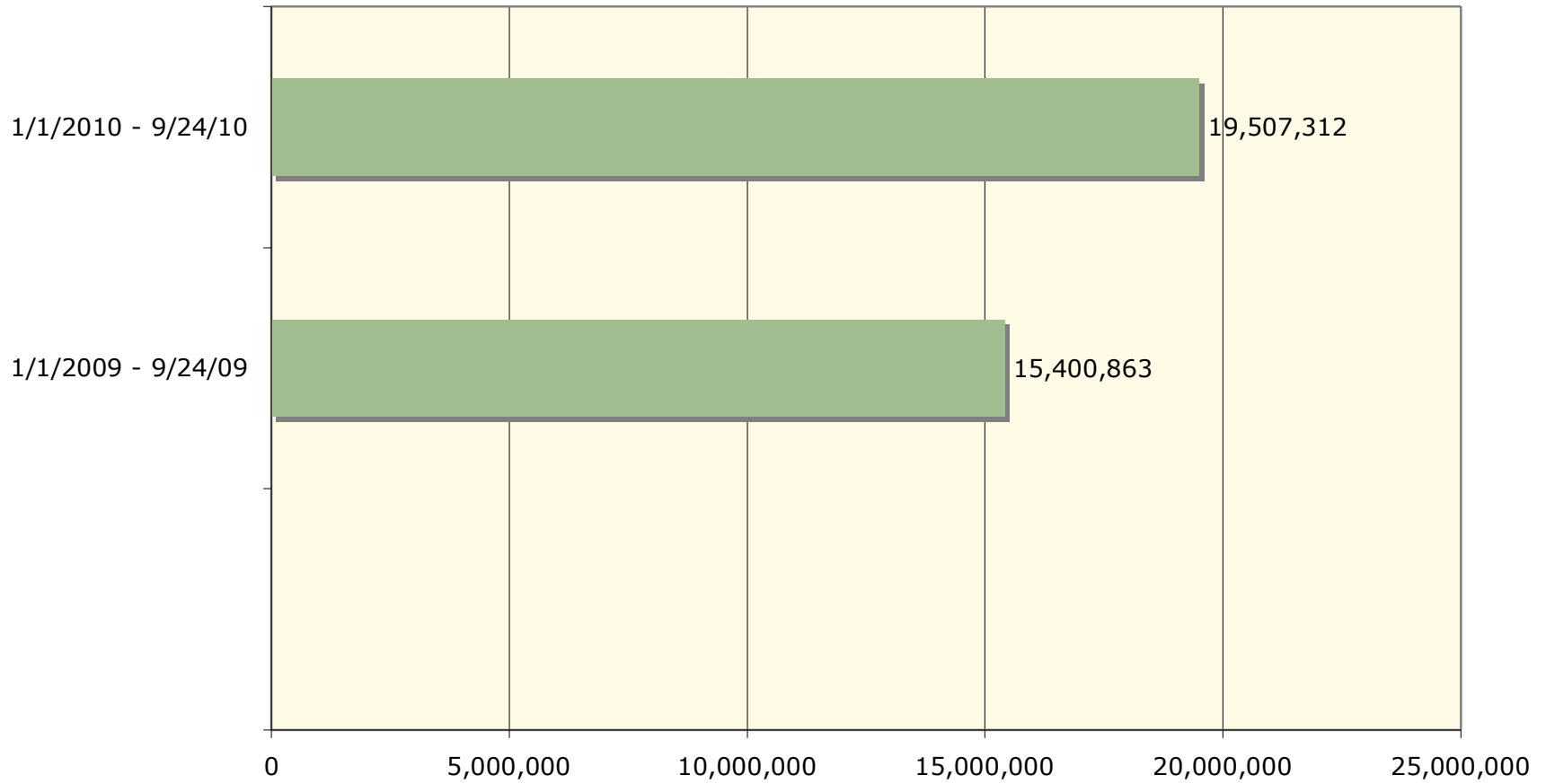


W&M News Content

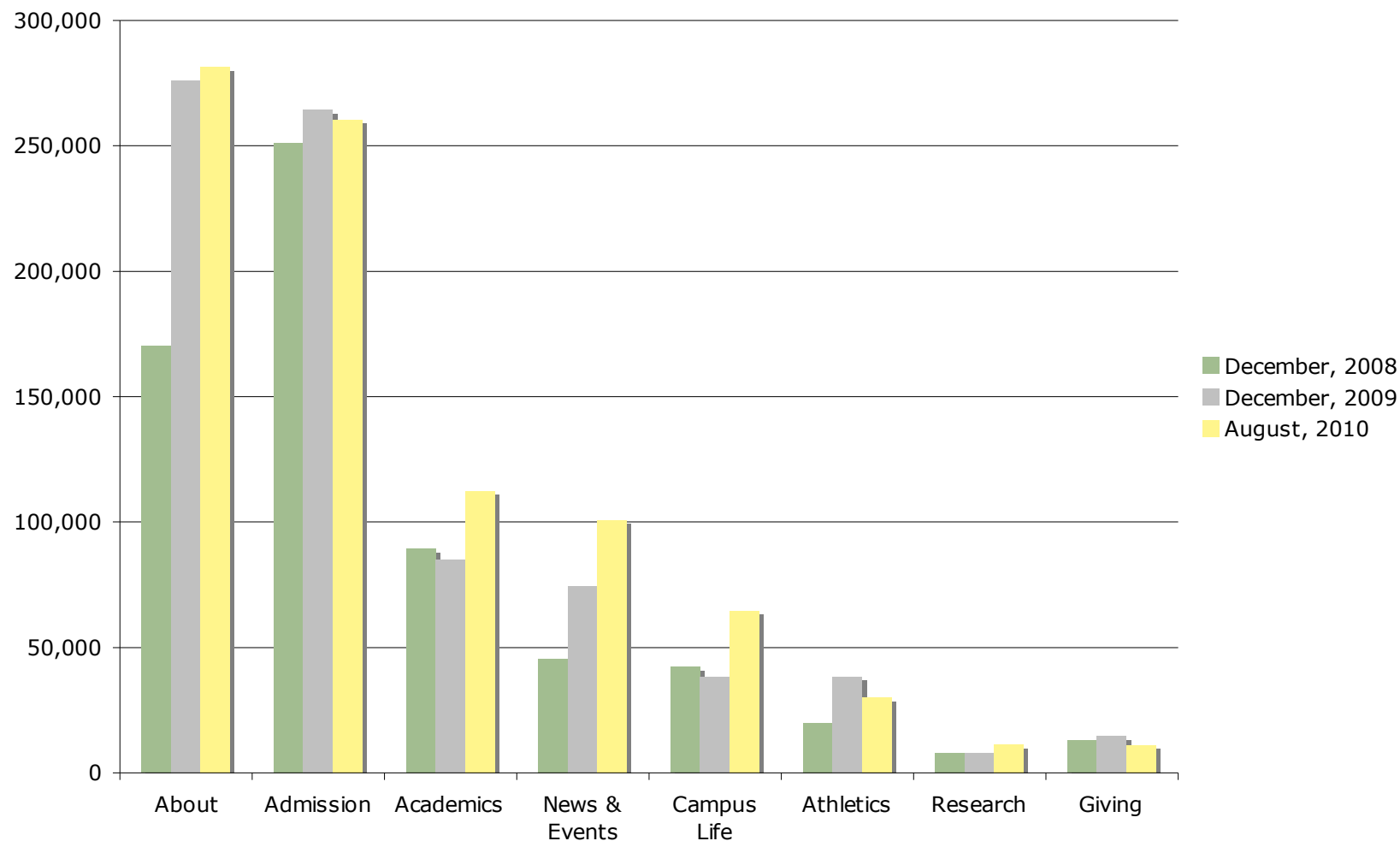


Effective 9-1-09, "Lifelong Connections" and "Research" articles tracked

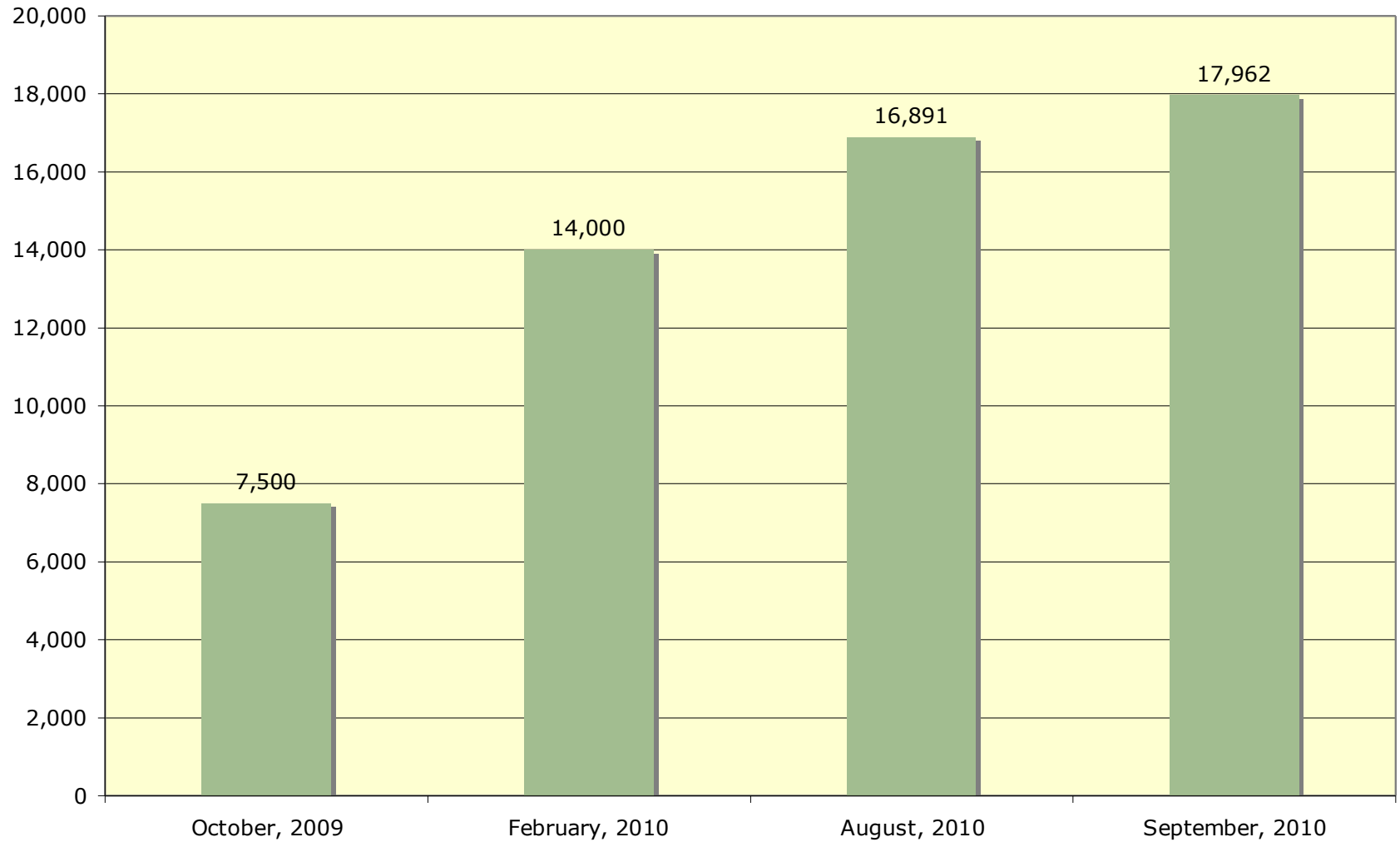
www.wm.edu (total hits – year to date, 2009 and 2010)



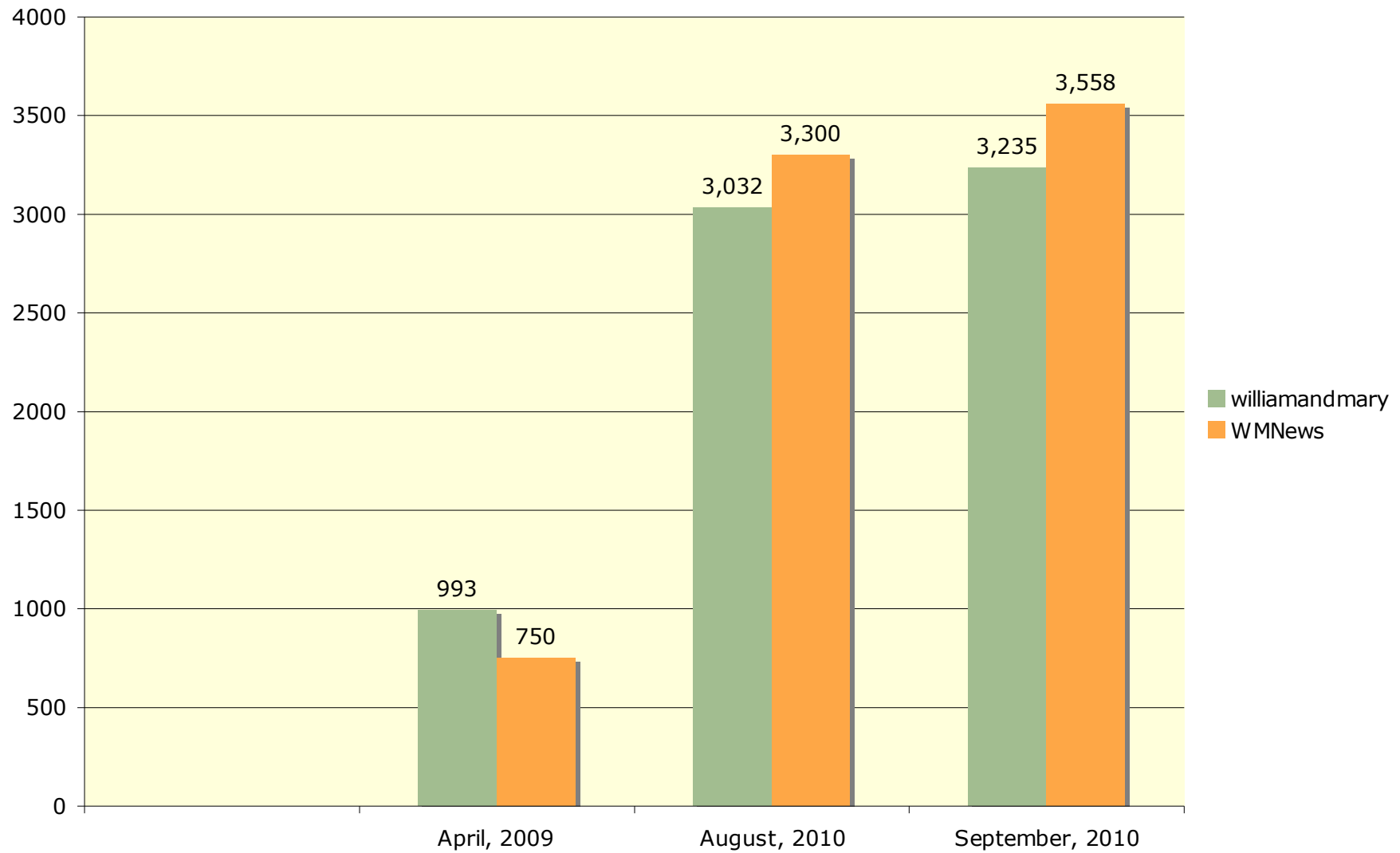
Top-level Sections of www.wm.edu (total hits)



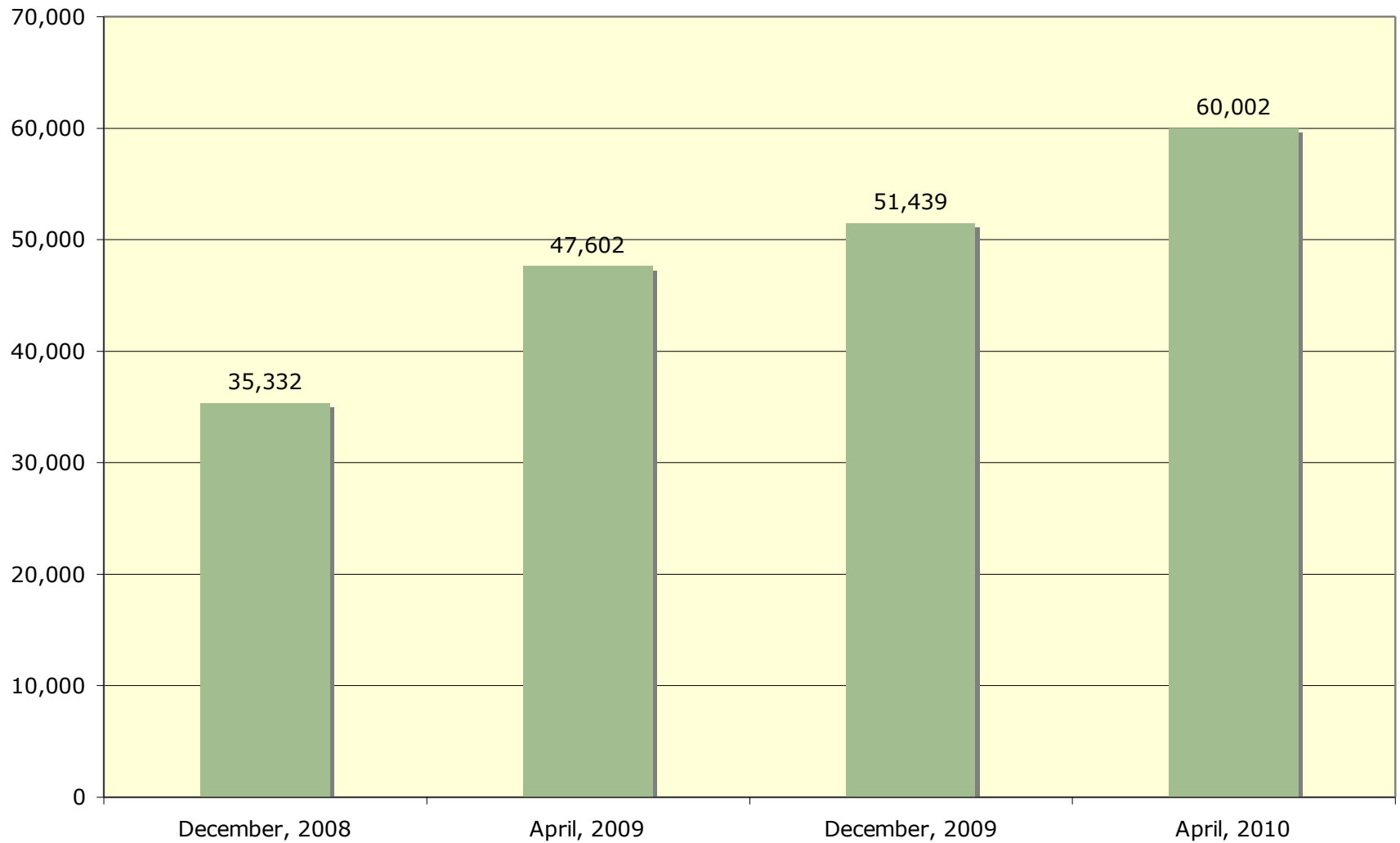
Number of W&M Facebook Fans



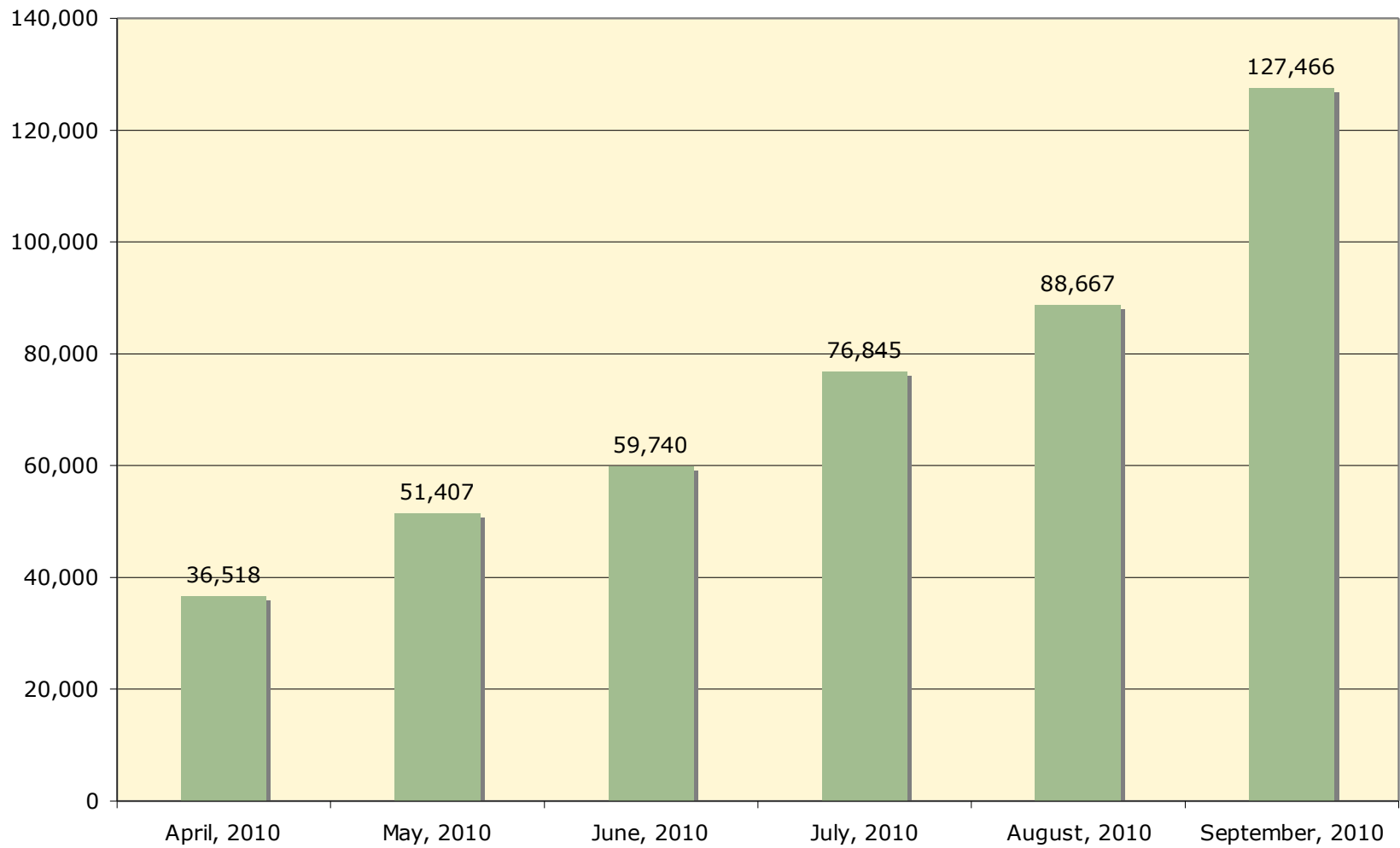
Number of Twitter Followers (@WM News and @williamandmary)



Blogs (total hits)



YouTube (total views of videos on W&M channel)



W&M on Flickr (image hosting website)

- Jan 2009 - Sep 2010:
346,654 views
of 915 photos
- Most popular :
“There’s nothing like
Old Campus in the fall.”
(2,455 views)



Rankings, Rankings, Rankings

- 75th in the world. *Times Higher Education* (Sep 10)
- 1st among U.S. public universities offering doctoral degrees in percentage of undergraduates who participate in study abroad. *Institute of International Education* (Fall '09)
- 31st among national universities (up 2); 6th best public university; 5th best university in strong commitment to teaching; 30th university ranked by high school guidance counselors. *U.S. News & World Report* (Aug '10)
- 46th overall ranking (up 2); 2nd best state-supported school. *Forbes* (Aug '10)
- 12th happiest students; 8th in professors get high marks; 8th best college library. Green rating “grade” rose from 90 to 93. *Princeton Review* (Aug 10)
- 1st school for service; 10th overall. *Washington Monthly* (Aug 10)
- 9th most service minded school; 21st most desirable suburban school; 21st best school for future power brokers. *Newsweek* and the *Kaplan College Guide* (Sep '10)

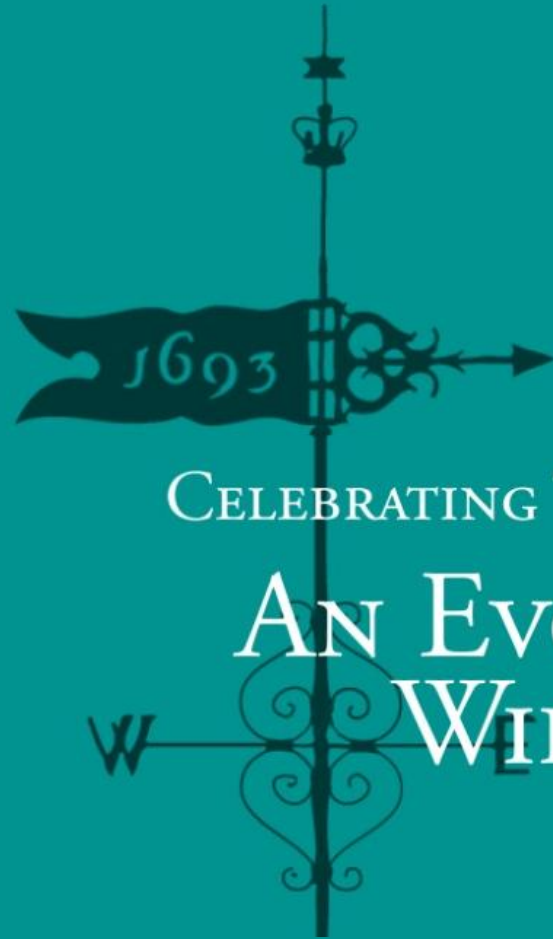
Government Relations

State:

- Governor's Commission on Higher Education Reform, Innovation and Investment
- Legislative Session
- Advocacy Efforts

Federal:

- Increased efforts in DC to raise visibility and activity of the College
- Federal request process now in place and underway campus-wide
- Begun working with a DC “kitchen cabinet” of alums who work on or around Capitol Hill



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Richmond Road Student Residence and Retail



City Council Approved – April 8, 2010

Break Ground – Summer 2010

Open – August 2011

11,800 Retail Gross SF; 36,750 Total Gross SF

14 Student Apartments; 56 Students