

Strategic Plan FY13-17 Overview

April 2012



Our Strategic Management Process

Our strategic management process includes:

- A short vision that describes our long-term aspirations
- A strategic focus that explains in general terms the things we will do to achieve the vision
- A set of challenges, goals and implementation steps that define the specific areas of current focus and action
- A system for aligning budget decisions with strategic priorities, tracking implementation, measuring progress and periodically iterating the process to review the challenges, goals and next steps



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



Vision Review

Current 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.

2011-2012 Review

- Lay the groundwork for a review of the challenges in 2012-2013.
- BOV and campus interest in greater aspiration in the vision.
- Discussions with VPs, Deans, Planning Steering Committee.
- Distinguish between a vision describing what we want to become, and a strategic focus outlining how we plan to get there.



Re-stated 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.

We tested this vision statement along with several other theme statements in the recent University Development survey. This vision statement was the overwhelming winner as the best option.



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.



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.



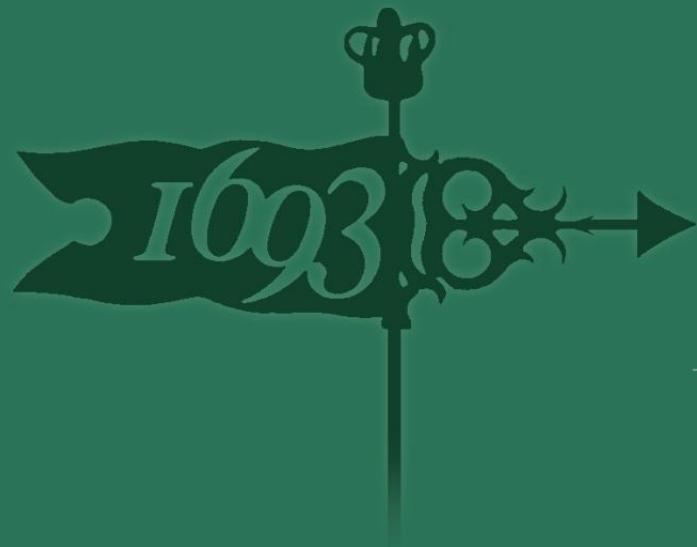
Highlights FY13 – Challenges 5 and 6

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.



Communications

April 2011



What's on the Web?

25 million
page views
per year

myWM DIRECTORY EVENTS VISIT W&M A-Z ebb GO

WILLIAM & MARY

ABOUT ACADEMICS ADMISSION RESEARCH CAMPUS LIFE ATHLETICS ALUMNI NEWS & EVENTS GIVING



about this photo Chancellor Robert M. Gates '65 looks on as members of Double Take sing a rendition of "Happy Birthday" at the College's 2012 Charter Day ceremony. photo by Stephen Salpukas

W&M NEWS

- Professor discusses history of 700-year-old document
- Virginia Symphony series in PBK Hall to begin Oct. 6
- Gentlemen of the College to perform in NYC on national TV
- Fraternities donate items to start archives

STUDENT BLOGS

"It's hard to believe that we have only one week of class left! Spring has arrived—the weather is beautiful and warm and the cherry blossoms have bloomed. In celebration of the warmer weather, the William and Mary in Washington program..."

EVENTS

- MAR 9 Tribe Basketball 7pm
- MAR 11 Motivational Speaker Joshua Sundquist '06 4pm - 5:30pm
- MAR 11 Saturday Enrichment Program noon

RIGHT NOW...

COMMENCEMENT INFO

NEWS IN VIDEO

FEATURING...

Links & Resources

Social Stream // W&M Blogs

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Current Students Careers at W&M
Employers About this Site
Faculty & Staff Emergency Information
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WILLIAM & MARY



ABOUT ACADEMICS ADMISSION RESEARCH CAMPUS LIFE ATHLETICS ALUMNI NEWS & EVENTS GIVING



about this photo

Chancellor Robert M. Gates '65 looks on as members of Double Take sing a rendition of "Happy Birthday" at the College's 2012 Charter Day ceremony.
photo by Stephen Salpukas

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Professor chronicles history of 700-year-old document



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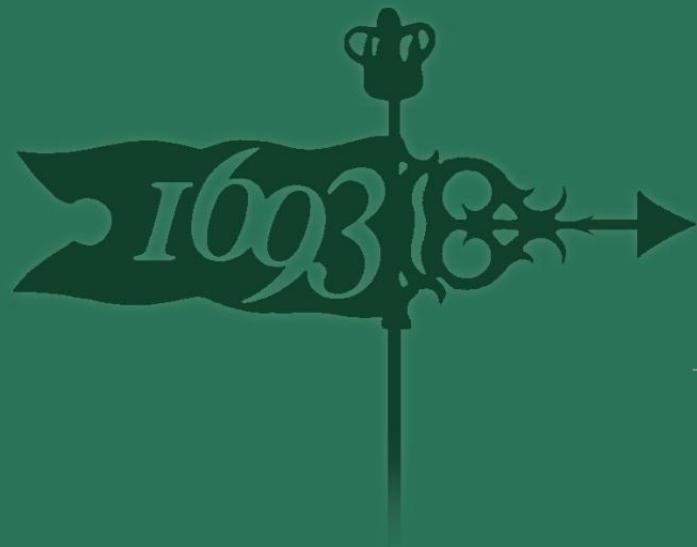


FEATURING...



W&M professor Matthew Allar joined with students in an underwater photo shoot to create publicity photos for the theatre production of "Eurydice."





Back-up Material

April 2011



Strategic Plan FY 13-17

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Planning History

2008-09 – President Reveley and the BOV launched the new W&M strategic management process, based on annual updates of an evolving five-year plan. The first tasks were to develop an inclusive process, unite behind a vision and identify challenges/opportunities of greatest importance.

2009-10 – Implemented initial steps under each challenge area and institutionalized the annual review process. Developed a dashboard with top level measures of performance. Emphasized the liberal arts conversation, communication and lifelong connections.

2010-11 – Streamlined planning and linked it even more effectively to the budget process. Sharpened the focus on challenge-level measures. Emphasized progress on the new financial model and innovation and efficiency projects in business processes.

2011-12 – Connected the 6-year plan for the state to the strategic plan, highlighting targeted salary adjustments. Emphasized the undergraduate curriculum review and creative adaptation in the academic sphere.



Early in our process we recognized the unique balance at William & Mary

William & Mary effectively blends characteristics that could conflict, but instead are mutually supportive in our context. The ampersand in our name represents the balance we strive to achieve. That balance reflects the blend of characteristics that help make W&M so significant. Our strategic planning process is celebrating tradition & forging change.

William & Mary

Celebrating tradition & Forging change

Alma mater of a nation & Citizen of the world

Dedicated to teaching & Devoted to research

Large enough for excellence & Small enough for community

Whole-heartedly undergraduate & Strategically professional and graduate

Supported by alumni committed to serve & Inspired by students prepared to lead



Our Major Immediate Challenge: Financial Resources

As a “one of a kind” public Ivy, William & Mary no longer has the financial resources to maintain our current excellence, much less move in the directions charted by our strategic plan.

We are doing better than the vast majority of other colleges and universities. But we are not doing well enough. **This century will belong to the schools that either already have or can build sustainable financial foundations. We need to build ours.**

Over the last generation, taxpayer support for William & Mary has declined from 43% of our operating budget to less than 13% this fiscal year. This trend is not likely to reverse, given the enormous demands on state revenue going forward.



Other Critical Challenges

The planning process targets four other critical challenges in support of advancing as a leader among liberal arts universities.

- Build and support a more fully diverse W&M community.
- Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M.
- Provide the administrative resources and infrastructure required for a university in the 21st century.
- Explain and promote W&M through a more effective communications structure and strategy.

We recognize the excellence that comes with inclusiveness, and we are committed to being a welcoming and supportive university. We will help students develop as leaders both in and beyond the classroom. We will give them opportunities to explore, experiment, take risks, build teams, and lead change. We will focus as well on W&M as a lifelong experience. We will build a stronger sense of stewardship among our students and our alumni.



Challenges in Summary Terms

The strategic planning process is organized around the six challenges or opportunities judged to be most important for the next five years.

1. Be a leader among **liberal arts universities** -- the overarching grand challenge.
2. Build and support a **more fully diverse W&M community**.
3. Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.
4. Develop and implement a business plan that maximizes revenue sources and ensures transparent resource allocation in support of College priorities and needs.
5. Provide the **administrative resources and infrastructure** required for a university in the 21st century.
6. Explain and promote W&M through a more effective **communications structure and strategy**.



Strategic Challenges/Opportunities and Goals

1. Be a leader among liberal arts universities.
 - Embed the core values of liberal arts education in all parts of the university - undergraduate, graduate and professional.
 - Provide more robust support for teaching, research, scholarship, and creative activities.
2. Support a more fully diverse W&M community.
 - Communicate W&M's commitment to diversity.
 - Ensure a welcoming and supportive campus.
 - Increase the diversity of the student body, faculty and staff.
 - Provide more diverse curricular offerings.



Strategic Challenges/Opportunities

3. Develop an ever more engaging campus experience that inspires a lifelong commitment to W&M.
 - Forge lifelong relationships with W&M.
 - Create a community that values life in balance.
 - Improve the campus residential experience.
4. Develop and implement a business plan that maximizes revenue sources and ensures transparent resource allocation in support of College priorities and needs.
 - Increase revenue and allocate resources consistent with institutional needs and priorities.
 - Enhance efficiency and effectiveness of operations and identify opportunities for revenue generation or cost savings across the institution. Improve transparency of College revenue and expenditures across all sources and types of expenditures.



Strategic Challenges/Opportunities

5. Provide the administrative resources and infrastructure required for a university in the 21st century.

- Engage, support, and retain a highly regarded workforce.
- Provide robust and dynamic infrastructure for campus-wide IT system needs to support the academic program and administrative functions.
- Ensure that the College has the type and quality of facilities needed to explore, teach and learn in the 21st century and which present the College in a competitive light for prospective faculty, students and staff.
- Provide a safe and secure environment.
- Become a model of sustainable operations.

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

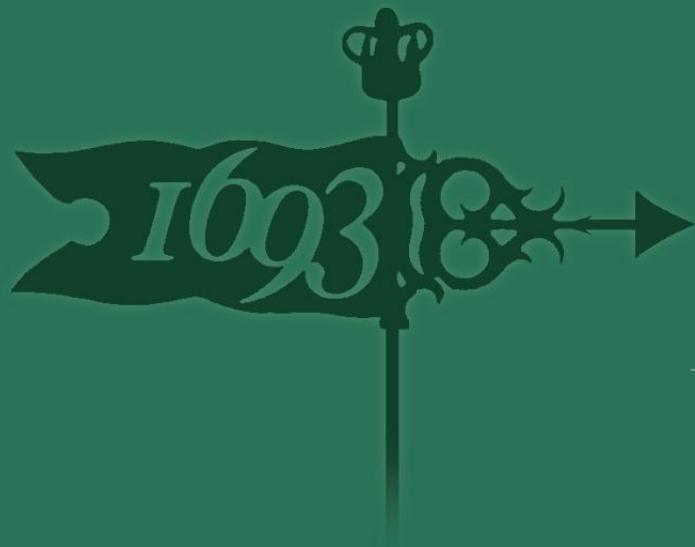
- Distill and promote a common identity.
- Enhance W&M's position as one of the nation's leading universities.
- Develop an integrated, appropriate communications capability.



Funding Priorities

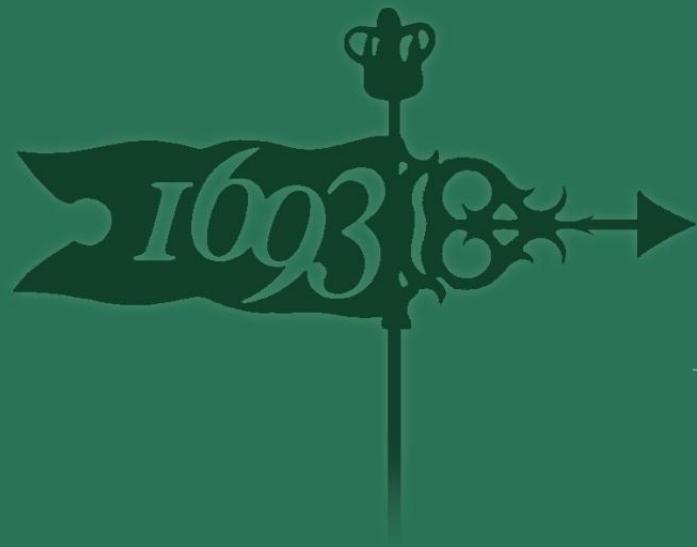
The Planning Steering Committee identified the following five top priorities for FY13:

- Salary increases for faculty and staff. This has become an important morale, productivity and competitiveness issue.
- Continue strategic investment in fund raising and development opportunities. Even though we have pressing current needs, we need to invest to ensure the future of the College.
- Increases in M&O funding. Several members expressed the view that these operating funds have been cut too far with serious consequences.
- Additional resources for the research enterprise. There are several categories in which this might be pursued. Several of them are interrelated. See Challenge 1, Goal 2 for specific implementation steps.
- A new Creative Adaptation Fund for academic initiatives. Reallocate funds for this initiative.



W&M Strategic Plan FY13-17: Appendices

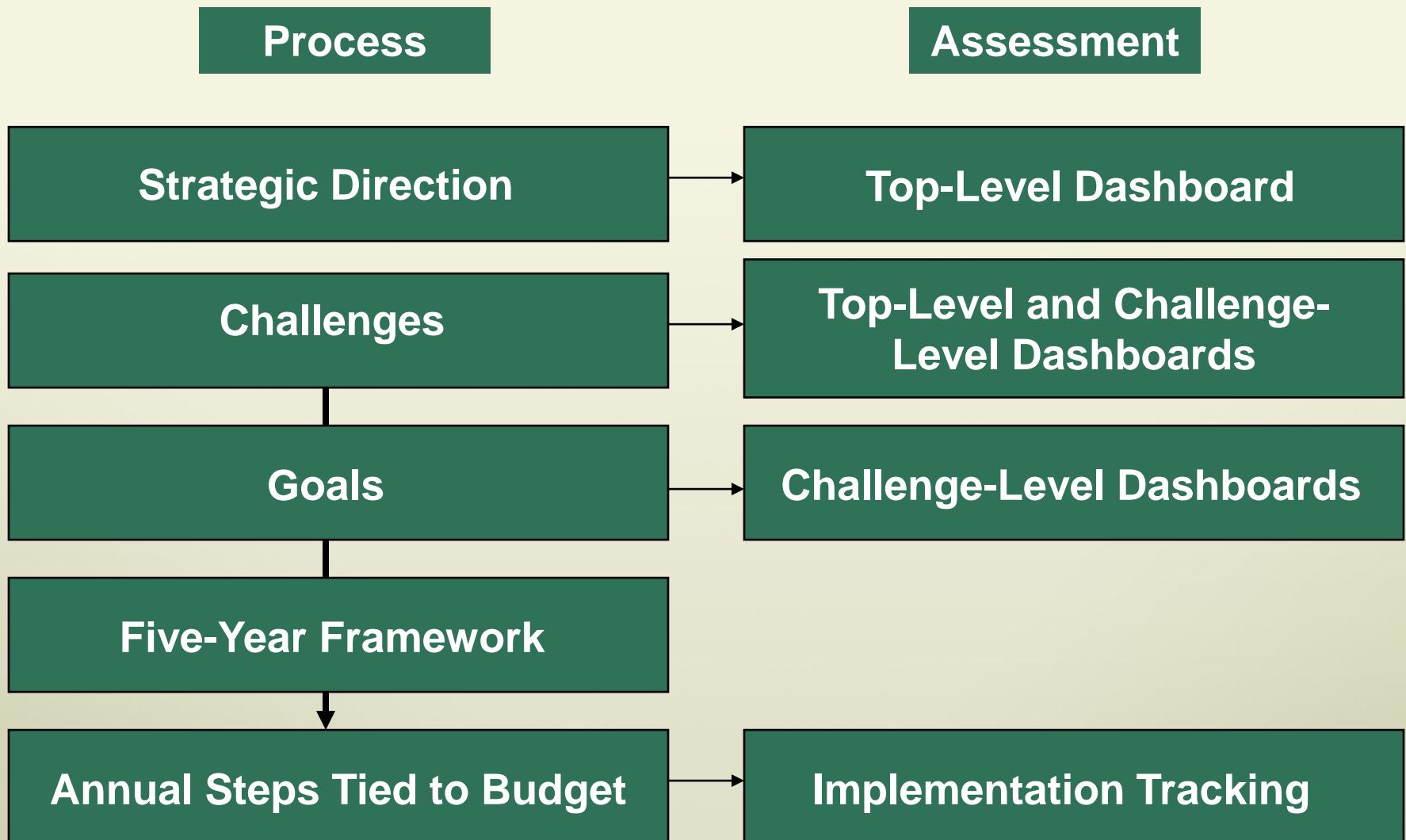
April 2011



Appendix I: Evaluation



W&M Assessment Process



Top Level Dashboard

Measures+	W&M 2007-08	W&M 2008-09	W&M 2009-10	W&M 2010-11	W&M 2011-12	Target	UVA* ***	Brown* ***
Challenge 1 – Leading Liberal Arts University								
1. Undergraduate acceptance rate ^a	34%	34%	34%	32%	35%	34%	33% (Fall 2011)	9% (Fall 2011)
2. Undergraduate yield rate ^a	37%	35%	34%	35%	33%	34%	44% (Fall 2011)	55% (Fall 2011)
3. Undergraduate 25 th – 75 th percentile SAT score range ^{b1}	1250-1450	1250-1440	1240-1450	1260-1440	1240-1450	1250-1450	1220-1450 (Fall 2010)	1330-1530 (Fall 2010)
4. Undergraduate graduation rates ^a	91% 2002 cohort	91% 2003 cohort	90% 2004 cohort	91% 2005 cohort	Avail. 5/2013 2006 cohort	93%	93% 2004 cohort	96% 2004 cohort
5. Student: faculty ratio ^{b8}	11:1	11:1	12:1	12:1	12:1	<13:1	16:1 (Fall 2010)	9:1 (Fall 2010)
6. Undergraduate small class percentage (2-19 students) ^b	49%	45%	48%	47%	48%	50%	52% (Fall 2010)	68% (Fall 2010)
Challenge 2 – Diversity								
7. Undergraduate students who are members of historically underrepresented groups ^{a9}	20%	22%	23%	25%	26%		26% (Fall 2010)	33% (Fall 2011)
8. Undergraduate students who are nonresident aliens ^a	1%	2%	2%	3%	3%		6% (Fall 2010)	10% (Fall 2010)
9. Graduate/professional students who are members of historically underrepresented groups ^{a9}	13%	13%	13%	14%	15%		16% (2010-11)	21% (2010-11)
10. Graduate students who are nonresident aliens ^a	8%	10%	12%	11%	12%		11% (Fall 2010)	27% (Fall 2010)
11. Average per-borrower cumulative undergraduate debt ^{c3}	\$16,765 2008 Class	\$18,410 2009 Class	\$21,367 2010 Class	\$20,835 2011 Class	Avail. 2/2013 2012 Class	<\$20,000	\$20,951 2011 Class	\$20,455 2011 Class
Challenge 3 – Lifelong Connection								
12. Alumni giving participation rate: undergraduates with degrees ^d	21.9%	22.4%	23.4%	Avail. 9/2012	Avail. 9/2013	30% by 2014	22% (USNews)	34.4% (2009-10)
Challenge 4 – Business Plan								
13. US News & World Report: Financial resources rank ^b	111	88	85	97	Avail. 9/2012	<70	60 (2010-11)	26 (2010-11)
14. Total sponsored program expenditures (millions) ^a	\$50	\$50	\$54	Avail. 4/2012	Avail. 4/2013	\$60 by 2014	\$344 (2009-10)	\$113 (2009-10)
15. Debt Service as Percent of Operating Expense ^f	4.2%	4.6%	4.1%	Avail. 9/2012	Avail. 9/2013	<7%	Not available	Not available
16. Annual Total Value of Private Gifts (in millions) ^{d6}	\$35	\$51	\$43	Avail. 9/2012	Avail. 9/2013	50	\$196 (2009-10)	\$167 (2009-10)
17. Endowment per student ^g	--	\$65,711	\$71,406	Avail 6/2012	Avail 6/2013		\$175,785 (2009-10)	\$262,557 (2009-10)
Challenge 5 – Administrative Resources and Infrastructure								
18. All E&G Facilities Condition Index ^{e5}	12.4%	11.0%	7.6%	7.8%	6.3%	<10%	8.7% (2010-11)	Not available
Challenge 6 – Communications								
19. US News & World Report: National Universities ^b	32	33	31 (tie)	33 (tie)	Avail. 9/2012		25 (tie) (2010-11)	15 (tie) (2010-11)
20. US News & World Report: Public Universities ^b	6	6	6	6	Avail. 9/2012		2 (tie) (2010-11)	32 Not applicable

⁺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 August based on data submitted in previous spring

^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)

¹Calculated 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).

⁵The 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.

⁶Annual rate based on Council for Aid to Education/ Voluntary Support of Education. For UVa, 2-year average from US News & World Report is used

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

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

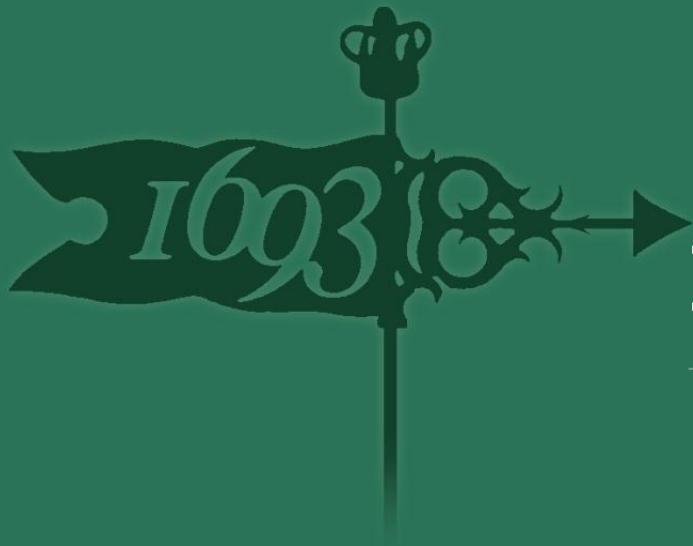
⁹Underrepresented groups include American Indian or Alaska Native, Asian/Native Hawaiian/ Other Pacific Islander, Black or African American, Hispanic or Latino, Two or more races. Underrepresented groups do not include White, Unknown, Nonresident aliens.



Status of Implementation Steps as of April 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, 231 steps have been included in the plan. Of those, 188 (81%) have been completed or adopted into continuing practice, 38 are still underway and 5 are have not yet started. The Planning Steering Committee tracks implementation.

Year Initiated	Not Yet Started	Underway	Completed	Into Continuing Practice	Total
2009-2010	0	7	49	39	95
2010-2011	0	7	24	32	63
2011-2012	5	24	12	32	73
Total	5	38	85	103	231



Appendix II: FY13 Implementation



Implementation Steps for FY13

The following pages present the implementation steps to be initiated in FY13 (2012-2013) and proposals that will be considered in FY14-17 as funds permit.

FY13: Steps in red square brackets will only be implemented if funds are available in the FY13 budget.

FY14-17: The items in red square brackets refer to Planning and Budgeting Requests that the challenge subcommittees felt were sufficiently important to retain in the plan for future years. Those requests remain on file for future consideration.



Challenge 1: Be a leader among liberal arts universities.

Goal 1: Embed the core values of liberal arts education in all parts of the university – undergraduate, graduate and professional.

FY13

- Begin implementation of recommendations from the review of the undergraduate curricula in A&S, Business and Education. (Halleran, A&S Dean, Appropriate Faculty Committees)*
- Complete review of the faculty merit and reward system and begin implementation of the recommendations. (Halleran, Deans, Appropriate Faculty Committees)*
- Expand and enhance summer opportunities for study and research, both on campus, in DC and abroad. In FY13 improve summer school and archaeology field schools and develop a plan for a summer undergraduate and graduate research institute. Seek private funds to increase summer scholarships for research and study abroad and for faculty/student research. (Halleran, Deans)*
- Create a new Center for Collaborative Teaching and Research. In FY13 develop a white paper describing a vision for the Center and programs it might incubate, identify development opportunities, create a course bank to promote inter-school teaching collaborations as an initial activity, provide seed funding for small projects. (Dean A&S, Other Deans)*
- Ensure that our mentoring programs are effective and aligned with our core values, from freshman advising, to career advising, and faculty and staff development. In FY13 carry out an audit of our mentoring programs, and compare with the best practices of other institutions, and offer recommendations for improvement. (Halleran, Deans, Career Services)*
- Expand and enhance the Reves Center's programs and improve their integration with other parts of the University based on findings in the Vice Provost's FY12 review. (Hanson, Deans)*
 - Continues into FY13-14

FY14-17 (framework for planning as funds permit)

- Ongoing implementation of recommendations from the reviews. (Halleran, Deans)



Challenge 1

Goal 2: Provide more robust support for teaching, research, scholarship, and creative activities.

FY13

- Ensure faculty and staff compensation is competitive. In FY13, seek to implement the raises of 5% for faculty and 4% for staff envisioned in the six-year plan. (Halleran, Jones)
- Expand graduate support as a base investment to maintain our competitiveness as a university. Ensure graduate and professional stipends are competitive with peer programs. In FY13, include expanded School of Education stipends [PBR 973 -- \$125,000], and scientific computing and operations research and other A&S graduate stipends [PBRs 978 and 981 -- \$375,000]. (Halleran)
- Provide competitive startup packages. In FY13, expand A&S start up funds as part of a base investment to attract the best faculty and allow faculty to become even more productive in their first critical years at the College [PBR 980 -- \$400,000]. (Halleran)
- Increase support and provide incentives for innovative and collaborative teaching and research. In FY 13, Create a new Center for the Environment and Society [PBR 956 -- \$200,000]. (Manos)



Challenge 1

Goal 2: Provide more robust support for teaching, research, scholarship, and creative activities.

FY14-17 (framework for planning as funds permit)

- Ensure faculty and staff compensation is competitive. (Halleran)
- Ensure graduate and professional stipends are competitive with peer programs. (Halleran, Jones) [PBRs FY12: Increase in A&S Graduate Stipends; Graduate Aid (School of Ed)]
- Create a fund to provide competitive startup packages in all disciplines. (Halleran, Jones) [PBR FY12: A&S startup funds]
- Ensure the Scheduled Semester Research Leaves (SSRL) and Summer Research Programs are fully supported.
- Increase library support based on needs assessment. (Dean of Libraries, Halleran) [PBR FY12: SWEM Library Technology Infrastructure]
- Increase support and provide incentives for innovative and collaborative teaching and research. (Halleran, Deans)
- Fully support the faculty research investment fund (RIF) (Halleran)
- Promote undergraduate research opportunities through private giving. (Halleran, Dean A&S)



Challenge 2: Support a more fully diverse W&M community

Goal 1: Communicate W&M's Commitment to Diversity

FY13

- 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 (i.e., Web presence, research projects, potential courses). (Halleran, Glover)
- Continue to review information on the W&M Website to assess the messaging about diversity at W&M. Recommend areas for improvement to Creative Services. (Continues from FY12) (Golden, Glover)

FY14-17 (framework for planning as funds permit)

- Complete assessment and research of diversity issues (Asst. to the Pres.); [PBRs FY12: Benchmark Surveys (IAE)]
- Implement recommendations from the reviews. (Glover)



Challenge 2

Goal 2: Ensure a welcoming and supportive campus

FY13

- Continue work in conjunction with Assistant to the President and HR Training Director to develop on-going workshops for faculty/staff on working with diverse populations (i.e., religious diversity, freedom of speech, etc.) (Continues from FY12.) (Martin, Halleran, Glover)

FY14-17 (framework for planning as funds permit)

- Support development of faculty/staff workshops [PBRs FY12: Education & Training (Asst. to the Pres.)]
- Continue multicultural lectures [PBRs FY12: Multicultural Lectures]
- Implement recommendations from the reviews.



Challenge 2

Goal 3: Increase the diversity of the student body, faculty and staff

FY13

- Develop a working plan that identifies University hiring needs for faculty and staff and identify key areas for opportunity. (Continues from FY12) (Halleran, Martin, Glover)
- Review operational diversity action plans submitted by Deans in FY12 and identify appropriate university responses.

FY14-17 (framework for planning as funds permit)

- [PBR FY12: Provide resources for enhanced recruitment tools/resources for admission office (Undergrad Admission)]
- [PBR FY12: Increase student financial aid for undergraduates and increase in all forms of graduate student financial aid]
- Create funding opportunities to enroll degree seeking international students.
- Expand institutional and financial support for visiting international faculty and scholars.



Challenge 2

Goal 4: Provide more diverse curricular offerings

FY13

- Review progress on the diversity of curricular offerings emerging from the ongoing undergraduate curriculum review and make recommendations as appropriate.

FY14-17 (framework for planning as funds permit)

- Implement recommendations from exploratory reviews
- [PBRs FY12: Provide funding for professional development (Asst. to the Pres.)]



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

Goal 1: Forge lifelong relationships with W&M

FY13

- Continue to expand the goal of engaging alumni at Homecoming by offering academic opportunities such as attending classes and faculty student panel presentation. (Alumni Association, Coordination Committee, Halleran)
- Actively promote services in the Cohen Center to alumni in need of career support and develop a plan for assessing the demonstrated need for such services (Cottrell, Ambler)
- Create a marketing campaign around *Wear William & Mary* encouraging alumni to wear a branded William & Mary item once a week. (Cottrell)
- Enhance chapter engagement through increased partnership with the development office. Raise the chapter support position in the Alumni Association to a director position.(Cottrell)
- Use technology to engage alumni. Specific goals for FY13 include streaming the Homecoming Parade live and producing quarterly *Ideation Talks* to be taped in Leadership Hall to showcase faculty research. (Cottrell)
- Seek a way in which to measure and quantify alumni engagement using a rich set of data with an eye towards enhancing cultivation strategies for leaders and donors, enabling strategic analysis of programs and services for the allocation of resources and formalizing the value of alumni relations (Cottrell, Development Office).



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

Goal 1: Forge lifelong relationships with W&M

FY14-17

- Enhance alumni ties by adding a position of Senior Assistant/Associate Director, Career Services [FY 14, PBR 885]
- Examine curricular and co-curricular offerings that promote life-long connections. Increase offerings and communicate availability. (Halleran)
- Expand DC-based activities for alumni including summer school classes, continuing-education programs, and career and networking. (Anthony)
- Explore feasibility of broadcasting events live – e.g. Raft Debate, Yule Log etc. (Creative Services)
- Explore feasibility of webcams for lecture classes. (Creative Services)
- Explore becoming an official location for TEDx talks. (Student Assembly, Ambler)
- Develop marketing and branding plan for W&M. (Cottrell, Ambler)
- Establish a pilot program to connect each entering freshman to an alumnus/mentor matched through established criteria, e.g. interest/program/major. (Cottrell)



Challenge 3

Goal 2: Create a community that values life in balance

FY13

- Promote a “Frenzy Free Finals” experience for students by implementing strategies for reducing stress and promoting healthy behaviors during reading days and final exams. (Ambler, Cooper, Knight)
- Initiate expanded hazing prevention and risk management efforts through the new cross-departmental Hazing Prevention Coalition. (Ambler, Knight, Arseneau)
- Expand outreach and education around alcohol and other drug abuse by implementing recommendations from the College’s Blue Ribbon Committee on Alcohol. (Ambler, Sikes)
- Together with resources from the Virginia Department of Mental Health, implement new educational efforts for faculty around the issue of student mental health, including on-line training modules and printed materials. (Ambler, Mann)



Challenge 3

Goal 2: Create a community that values life in balance

FY14-17

- Build an additional lighted playing field to meet the high demand of students participating in recreational, intramural, and club sport play. (Ambler, Knight)
- Develop a comprehensive approach to education around nutrition/body image/exercise; promote healthy eating and exercise; expand education and prevention around the problem of disordered eating (Ambler, Mann, Wells, Knight)
- Promote Residence Life student staff planning for and implementation of events and activities consistent with both “a life in balance” and the “lifelong relationship”. (Ambler)
- Establish a working group to prioritize initiatives for improving the work life of faculty and staff. (HR, Faculty Assembly, Staff Assembly, PPFA, Glover)
- Complete implementation of recommendations from Greek life review. (Ambler)
- Create co-curricular database. (Ambler)



Challenge 3

Goal 3: Improve the campus residential experience

FY13

- Refurbish the current “Units,” including those which house fraternities, and develop a plan for how best to use those facilities once the new fraternity houses are open in Fall of 2013; rename the facilities to instill more pride among residents. (Martin, Ambler)
- Together with the Real Estate Foundation, explore options for additional student housing near the campus (200+ beds beyond those being added to the inventory through the fraternity housing project). (Martin, Ambler, Jones)
- Assess the current need for graduate student housing. (Martin, Ambler)
- Refine the plan for more aggressively addressing problems of deferred maintenance in the residence halls. (Martin, Ambler)
- Develop plans and raise funds for the Eco-Village. (Butler, Taylor)



Challenge 3

Goal 3: Improve the campus residential experience

FY14-17

- Implement as appropriate recommendations from the First Year Experience Committee (FYEC), with particular attention to residential programming, since all first year students live on campus (Ambler, Volp)
- Explore outdoor seating areas adjacent to buildings. (Ambler, Martin)
- Explore feasibility of incorporating “included” laundry option. (Ambler, Martin)
- Accelerate renovations of Chandler, Landrum, Barrett. (Ambler, Martin, Jones)

FY13

- Provide planned expanded funding for development operations. [PBR 1010]
 - Build momentum for a future campaign through increased gift levels, refinement of messages and communication platforms, and activation of a volunteer network.
- * Continues into FY14-17

FY14-17

- Continue investment in development operations. [PBR FY12: Development Operations]*
- Provide funding for a research investment fund [PBR FY12: Research Investment Fund]*



Challenge 4

Goal 2: Enhance efficiency and effectiveness of operations and identify opportunities for revenue generation or cost savings across the institution. Improve transparency of College revenue and expenditures across all sources and types of expenditures.

FY13

- Additional staff to meet State and College demands. [PBR 967 -- \$62,819]
- 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.* (Halleran)
- 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.* (Halleran)
* Continues into FY 13-16.

FY14-17

- Support distance learning pilots in schools that wish to pursue them. [PBR FY12: Distance Learning—School of Business Pilot]*
- Ensure that the Technology and Business Center has sufficient support for regional business collaborations [PBR FY12: Regional Business Collaborations]
- Continue FY 2013 activities.

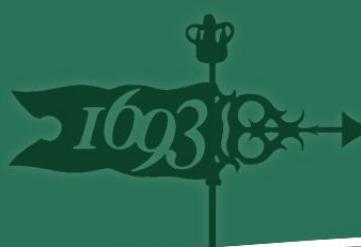
Goal 1: Engage, support and retain a highly regarded workforce

FY13

- Free up O&M funds through innovation and greater efficiency initiatives. (Budget managers)
- Increase E&G funding for O&M [PBR 941 -- \$1,292,605: Challenge priority 2]
- Professional Development [PBR 939 -- \$50,000: Challenge priority 3]

FY14-17

- Increase HR staffing by one position in FY14 [PBR 938 -- \$70,000]
- Sustain appropriate O&M funding [Combination of multiple PBRs FY12]
- Improve salary equity for staff in 1st and 2nd quartile of salary ranges. [PBR FY12: Increase funding for next six years) (Martin)
- Structure Office of Human Resources to manage University system appropriately. [PBR FY12: Add positions and supporting operational funds]. (Martin)
- Continue FY13 activities. (Martin)



Challenge 5:

Goal 2: Provide a robust and dynamic infrastructure for campus-wide IT system needs to support the academic program and administrative functions

FY13

- Deploy software systems to enhance business practices. (Continues from FY12) (Carpenter, Kenney)
- Deploy events management and room scheduling software and services. [PBR 964 -- \$45,708: Challenge priority 6]

FY14-17

- Fund High Performance Computer maintenance. [PBR FY12: Annual support]. (Carpenter)
- Provide funding to deploy additional software systems to enhance business practices. (Carpenter, Kenney) [PBR FY12: Funding for software and student support.]
- Provide funding to improve generation of summary reports from the Banner system. [PBR FY12: Purchase and maintain business/intelligence support system.] (Carpenter, Kenney)
- Modernize Jones Hall computer facility. (Carpenter, Martin)
- Implement software that tracks interactions of core campus constituencies and unified electronic portfolios. (Carpenter)
- Create a consolidated environment for institutional data that supports planning, analysis and forecasting. (Carpenter)



Challenge 5:

Goal 3: Ensure that the College has the type and quality of facilities needed to explore, teach and learn in the 21st century and which present the College in a competitive light for prospective faculty, students and staff

FY13

- Establish staffing to support space allocation. [PBR 930 -- \$220,915: Challenge priority 4]

FY14-17

- Initiate design of ISC3. (Martin)
- Continued progress toward baseline budget and funding to implement plans. (Jones, Martin)
- Begin to fund maintenance at 2.5% of Current Plant Value. [PBR FY12: Phase in cost annually over time. (Martin)]
- Develop a plan for a university-wide space inventory system to document function and use of facilities. [PBR FY12: fund inventory system position, operations support and one-time expenses.]



Challenge 5

Goal 4: Provide a safe and secure environment

FY13

- Add two law enforcement positions. [PBR 934 -- \$97,078: Challenge priority 1]

FY14-17

- Increase security presence on campus. [PBR FY12: Expand number of police officers over six years.] (Martin, Jones)
- Increase legal resources. (Halleran, Martin, Jones)
- Increase support for monitoring and management of hazardous materials. (Martin)
- Develop central monitoring station for fire, security and maintenance emergencies. (Martin)



Challenge 5

Goal 5: Become a model of sustainable operations

FY 13

- Fund energy reduction projects. [PBR 932 -- \$300,000: Challenge priority 5]

FY14-17

- Improve storm-water management in FY14. [PBR 940: \$365,768]
- Initiate energy reduction projects. [PBR FY12: energy reduction.] (Martin)
- Improve storm-water management including reducing and controlling nutrients and pollutants. [PBR FY12: storm-water position, support and one-time funding.] (Martin)
- Continue sustainability fellowships to support sustainability programs. [PBR FY12: Fund permanent position, split costs with green fee.] (COS)
- Implement carbon-footprint reduction plan. (Martin)
- Continued work on and funding for storm water, land use and energy conservation programs. (Martin)



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

Goal 1: Distill and promote a common identity

FY13

- Continue implementation of the oversight process recommended by the Visual Identity Committee with specific alignment goals, timelines, and projected costs. (Continues from FY12) (Golden)
- Implement recommendations from internal communications review committee.

FY14-17 (framework for planning as funds permit)

- Implement the marketing research program as funds permit. (Golden) [PBR FY12: Institutional Analysis and Effectiveness]



Challenge 6

Goal 2: Enhance W&M's position as one of the nation's leading universities

FY13

- Expand Admission programs and outreach [PBR 991 -- \$40,000]

FY14-17 (framework for planning as funds permit)

- Provide funds for expanded coverage of research, scholarship and creative activities. [PBR FY12: OSI Research Communication]
- Increase over five years coverage of *William and Mary, especially its research, scholarship and creative activities*, in targeted media by 50% from the calendar year 2009 base. (Golden)



Challenge 6

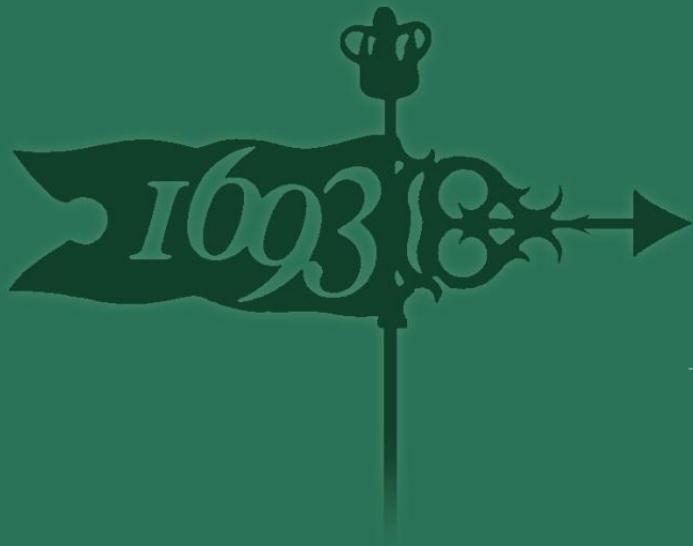
Goal 3: Develop an integrated, appropriate communications capability

FY13

- Launch a national media and video studio [PBR 977 -- \$183,547: Challenge top priority]

FY13-15 (framework for planning as funds permit)

- Implement the infrastructure and budgeting model for a national media and video studio. [PBR FY12: OSI National Media and Video Center]
- Assess newly implemented structures/services and request resources as needed. (Golden)



Appendix III: Membership



Appendix I: Committee Membership 2011-12

Planning Steering Committee

Michael Halleran, *Co-Chair*, Provost

James (Jim) Golden, *Co-Chair*, VP, Strategic Initiatives

Virginia (Ginger) Ambler, VP Student Affairs

Elizabeth (Liz) Canuel, Professor, VIMS

Bruce Christian, W&M Foundation Trustee

Karen Cottrell, Executive VP, Alumni Association, Co-chair of Challenge 3 Subcommittee

Edward (Terry) Driscoll, Director of Athletics

Fanchon (Chon) Glover, Assistant to the President for Diversity and Community Initiatives, Chair of Challenge 2

Earl Granger, Associate VP for Development

Charles (Rick) Gressard, Professor, School of Education, VP Faculty Assembly

William (Will) Hausman, Chancellor Professor of Economics, Faculty Assembly Immediate Past President

Thomas (Tom) Innes, Graduate Student Council Representative

Samuel (Sam) Jones, VP, Finance. Chair of Challenge 4 Subcommittee

Dennis Manos, Vice Provost for Research and Graduate and Professional Studies

Anna Martin, VP, Administration, Chair of Challenge 5 Subcommittee

Virginia (Ginnie) McLaughlin, Dean, School of Education, Chair of Challenge 6 Subcommittee

Alan Meese, Ball Professor, School of Law, BOV Liaison

Mary Molineux, President of the Professional and Professional Faculty Assembly

Todd Mooradian, Professor, School of Business, President Faculty Assembly

Kaveh Sadeghian, President of the Student Assembly

Sarah Stafford, Paul Verkuil Professor of Economics, Public Policy and Law, Co-chair of Challenge 3 Subcommittee

John Swaddle, Professor, Biology

Deloris Thomas, Assistant to the Dean of University Libraries, President of Staff Assembly

Eugene (Gene) Tracy, Chancellor Professor of Physics and Applied Sciences, Acting Dean of the Faculty of Arts and Sciences, Chair of Challenge 1 Subcommittee



Subcommittee 1

Challenge 1 – Liberal Arts University

Gene Tracy, *Chair*, Professor of Physics, Acting Dean of the Faculty of Arts and Sciences

John Boschen, Brinkley-Mason Professor, School of Business

Colin Campbell, Member, Board of Visitors

Bruce Christian '73, W&M Foundation Trustee

Dave Douglas, Dean, School of Law

Ravenn Gethers, Doctoral Student, EPPL Higher Education Administration

Rick Gressard, Professor of Education

Steve Hanson, Vice Provost, International

Monty Mason, '89, Alumni Representative

Leisa Meyer, Associate Professor and Chair, Department of History

Abdullah Noor, '13, Undergraduate Student

Cathy Reed, Director of Collections and Content Services, Swem Library

Sophia Serghi, Professor, Composition and Theory, Music

John Swaddle, Professor, Biology, and Director, Environmental Science and Policy
Program, Environmental Science/Studies

John Wells, Dean, School of Marine Science



Subcommittee 2

Challenge 2 – Diversity

Chon Glover M.Ed. '99, Ed.D. '06, *Chair*, Assistant to the President for Diversity and Community Initiatives

James (Jim) Barber, Assistant Professor, School of Education

Dimelza Gonzales-Flores '12, Undergraduate Student

Earl Granger '92, M.Ed. '98, Associate VP for Development

Kim Green '13, Undergraduate Student

Paul Heideman, Professor, Biology

Dennis Liberson '78, Member, Board of Visitors

Pamela Mason, Assistant Athletic Director

Justin Reid '10, Alumni Representative

Deloris Thomas, President of Staff Assembly, Swem Library

Wendy Webb-Robers, PPFA



Subcommittee 3

Challenge 3 – Community

Karen Cottrell '66, M.Ed '69, Ed.D. '84, *Co-Chair*, Executive Vice President, Alumni Association

Sarah Stafford, *Co-Chair*, Paul Verkuil Professor of Economics, Public Policy and Law

David Aday, Professor of Sociology

Ginger Ambler '88, Ph.D. Ed. '06, Vice President for Student Affairs

Janet Atwater, President, Alumni Association

Clay Clemens, Associate Chair and Chancellor Professor of Government

Tammy Currie, Director of Equal Opportunity

Terry Driscoll, Director of Athletics

Jean Estes '75, W&M Foundation Trustee

Steph Fellito, '12, Undergraduate Student

Laura Flippin '92, Member, Board of Visitors

Linda Knight, Director of Recreation

Kaveh Sadeghian, '12, President of the Student Assembly

Joel Schwartz, Director of the Charles Center



Subcommittee 4

Challenge 4 – Financial Model

Samuel (Sam) Jones '75, M.B.A. '80, *Chair*, Vice President for Finance

Timothy (Tim) Dunn '83, Member, Board of Visitors

Tom Gillman M.B.A. '93, Alumni Representative

Ethan Golab, Undergraduate student '13

William (Will) Hausman, Chancellor Professor of Economics

Carl Hershner, Professor of Marine Science

Elaine McBeth, Associate Director, Public Policy Program

Alan Meese '86, Professor, School of Law

Dennis Manos, Vice Provost for Research and Graduate Professional Studies

Sean Pieri, Vice President for Development

Lawrence (Larry) Pulley, Dean, School of Business

Anthony Washington, Ph.D. Student

Thomas (Tom) Watkins '74, W&M Foundation Trustee



Subcommittee 5

Challenge 5 – Infrastructure

Anna Martin, *Chair*, Vice President for Administration

Charles Banks, Member, Board of Visitors [To be confirmed]

Lynda Butler '73, Professor, School of Law

Elizabeth Canuel, Professor, VIMS

Courtney Carpenter, Chief Information Officer, IT

Carrie Cooper, Dean of University Libraries

Thomas (Tom) Innes, MBA '12 Candidate, Graduate Student Council Representative

Heather Macdonald, Professor, Geology

Earleen O'Roark, Human Resources

Dave Shepard, Facilities Management



Subcommittee 6 and Evaluation

Challenge 6 – Communications

Virginia McLaughlin '71, *Chair*, Dean of the School of Education

Tina Coleman, Acting Director, Creative Services

Kyra Cook '92, Alumni Representative

Gabriel Eriquez, Undergraduate student, '13

Renell Franklin, Director of Development Communications

Nancy Gofus '75, W&M Foundation Trustee

Mary Molineux '75, President of the Professional and Professional Faculty Assembly,
Swem Library

Larry Ring, Professor, School of Business

Pete Snyder '94, Member, Board of Visitors

Evaluation Coordination

Coordinator: Susan Bosworth, Associate Provost for Institutional Analysis and Effectiveness

Faculty Advisers: Bruce Bracken, Professor, School of Education; John Gilmour, Professor,
Government and Public Policy