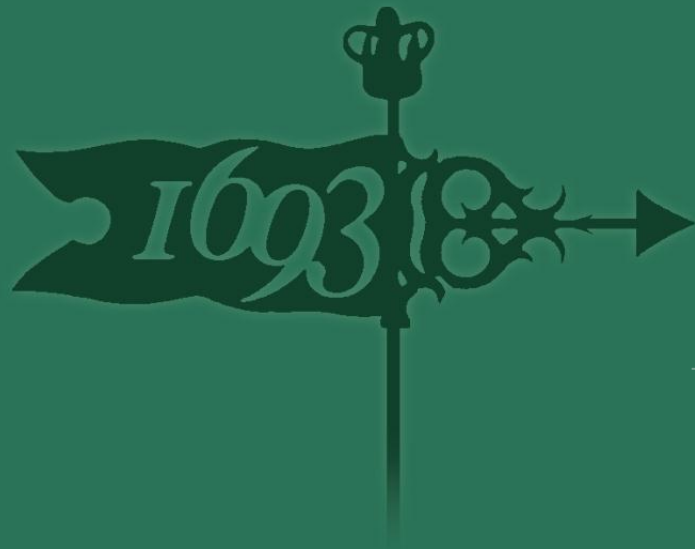


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# Strategic Initiatives and New Ventures

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September 2012



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# Strategic Planning Review

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## 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



## Five-Year Review

### Summer

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

### Fall

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

### Winter

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

### Spring

- Plan for FY 2014-2019 to BOV



## 1. Leading Liberal Arts University

- Planning: Liberal arts university review; Library needs; Undergraduate curriculum; Faculty merit and reward system; Potential Center for Collaborative Teaching and Research.
- Support: Raised emphasis on competitive compensation, start-up packages, graduate and professional stipends and made (varying) degrees of progress in all areas.
- Interdisciplinary: Marine science minor; Cross-disciplinary STEM center for K-12 teachers; Center for Energy and Environment.
- Global: Launched joint degree program with St. Andrews; Opened Confucius Institute.



## 2. Welcoming

- Staff: Assistant to the President for Community Initiatives and Chief Diversity Officer.
- Planning: Reviewing diversity of faculty at other institutions by academic discipline; Deans developed operational diversity action plans.
- Communication: Web coverage; Diversity e-newsletter.
- Education: Lemon Project ; Multicultural lectures; Workshops for faculty/staff about working with diverse populations.
- Access: Deployed web-accessible digital map including American Disability Act access points.



### 3. Connected for a Lifetime

- Lifelong Connections: Group created at VP level; Re-designed Welcome Week, Convocation and Charter Day; Opened Cohen Career Center; Moved alumni reunion activities back to campus.
- Residence Life: New fraternity residences with 180 beds; Tribe Square; Plans to refurbish the “units” vacated as fraternities move; Exploring options for additional 200+ bed student housing near campus; Eco-Village; Assessing graduate student housing.
- Student Support: Expanded programs to meet the psychological and developmental needs of students, hired additional staff including a full-time psychologist.





## 4. New Financial Foundation

- Planning: Tied annual budget process and fund-raising to strategic plan priorities; Developed 6-year plan in response to TJ21 legislation; Initiated annual joint meetings of the College's three leadership boards.
- Philanthropy: Strategic investments; Increased emphasis on annual giving; Built momentum for a future campaign -- increased gift levels, refined of messages, activated volunteer network.
- Productivity: Targeted merit salary increases; Launched over 50 innovation and efficiency projects and achieved over \$2 million in cost savings and net new revenues in FY12; Launched a three-year, \$200,000 per year, Creative Adaptation Fund; Five percent reallocation of the E&G budget in each school over FY13-FY15.



## 5. Staffed/Equipped

- Buildings: Renovated Small Hall; Began work on Tucker, Feasibility study for Tyler, Completed ISC third phase plans; Initiated review of arts facilities pre-planning study.
- HR: Rolled out University HR system and implemented performance evaluation system
- IT: Software to enhance business practices; modern network infrastructure; private branch exchange and voice mail systems.
- Sustainability: Recycling; Eco-Ambassador Program; Sustainability Fellowships; Storm-water management plan; carbon-footprint reduction plan for 2011-2030.
- Risk Management: Completed risk management assessment policies and procedures and began assessments.



## 6. In Touch

- Coordination: Created President's Communication Group, a supporting Working Group, and a university-wide Communications Committee. Annual plans and evaluation process.
- Actions: New Creative Services organization; Revised website -- refreshed in-house; Communications themes consistent with the strategic plan; Message map for communicators; annual web-based President's Reports; mascot search.
- National medial coverage: Achieved substantial increases in national coverage of faculty achievements; Web-based faculty "experts" list; Communications training program for faculty; Establishing a media studio to expand faculty access to media.



# Vision/ Strategic Focus



**2. Welcoming**



**5. Staffed/  
Equipped**

**1. Leading Liberal Arts University**

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



**3. Connected  
for a Lifetime**



**6. In Touch**

**4. New Financial Foundation**



## Preliminary Initiatives and Illustrative Steps

- Provide Exceptional Student Experience
  - Integrate academic and career counseling
  - Comprehensive leadership development program
- Foster Multimodal Delivery of Education
  - Expand creative adaptation fund
  - Strategic review of options and IT backbone
- Promote Learning in Applied Settings
  - Consider requiring all students to have an internship, research or international experience
  - Expand opportunities through the DC office and with industry
- Encourage Interdisciplinary Connections Across Academic Areas
  - Curriculum review
  - Merit review
- Forge Stronger Global Perspectives and Connections
  - Diversify the international student body
  - Expand global research partnerships

**We are Breaking Boundaries**



# Vision/ Strategic Focus



2. Welcoming



5. Staffed/  
Equipped

1. Leading Liberal Arts University

We are Breaking Boundaries  
across the whole range of  
student-faculty-staff interactions,  
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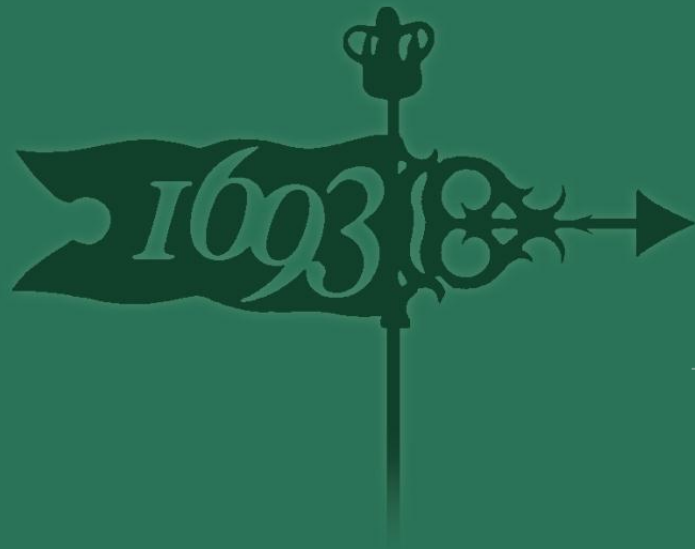


3. Connected  
for a Lifetime



6. In Touch

4. New Financial Foundation



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# New Ventures

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## EVMS Overview

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

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





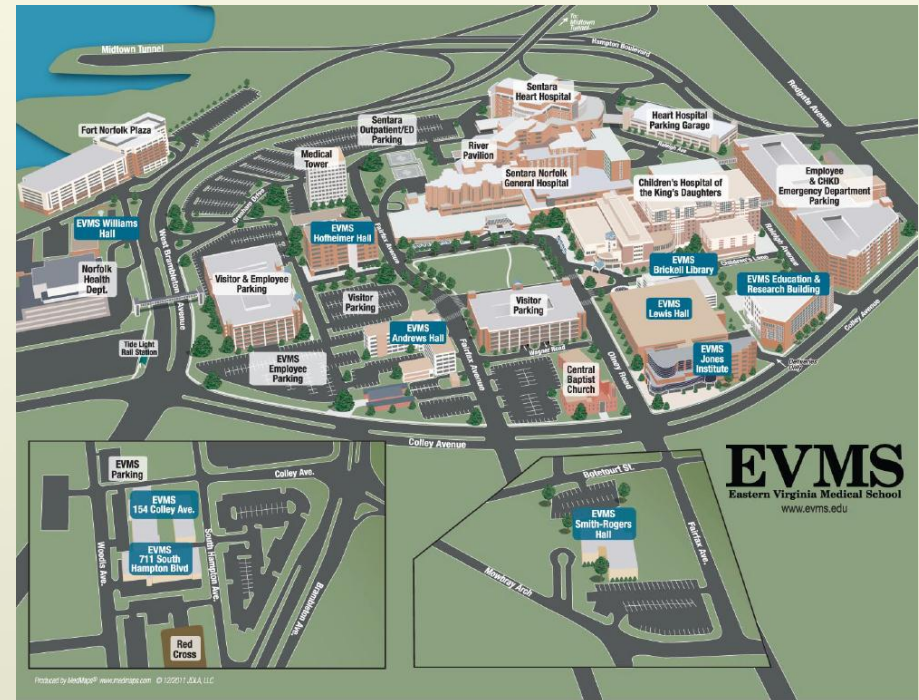


# W&M Steering Committee

## Members –

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

Initial site visit on August 15



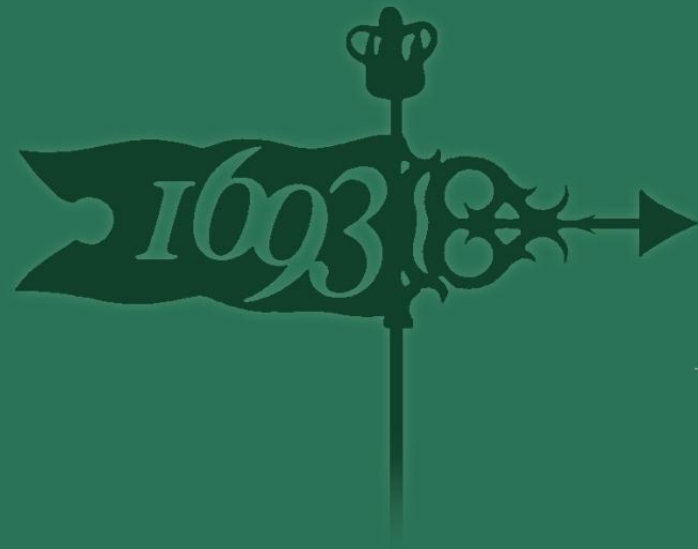


## EVMS Timeline

September: Gather information, engage counterparts. Identify consultants. Develop list of things that must be true for this possibility to make sense for W&M. This must be compelling for our students, faculty, alumni and people of the Commonwealth. Subcommittees underway:

- Academic Programs
- Academic Culture
- Organizational Structure and Legal Issues
- Budget and Health Care Issues
- Political and Communication Issues

October: Provide President an interim assessment by October 15



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# Communications

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September 2012



## Alumni-Communications-Development (ACD) Initiatives

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



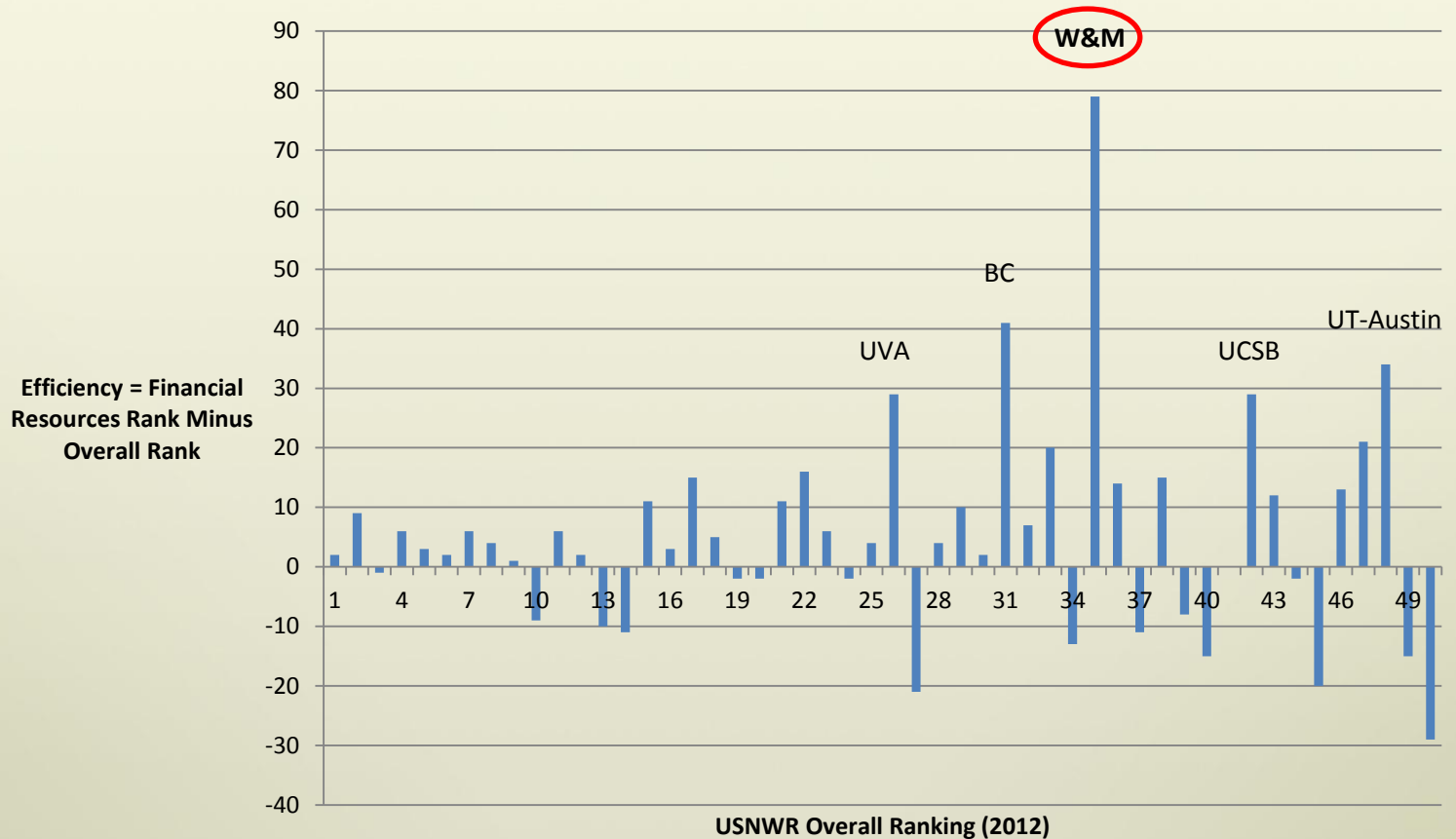
## Rankings

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



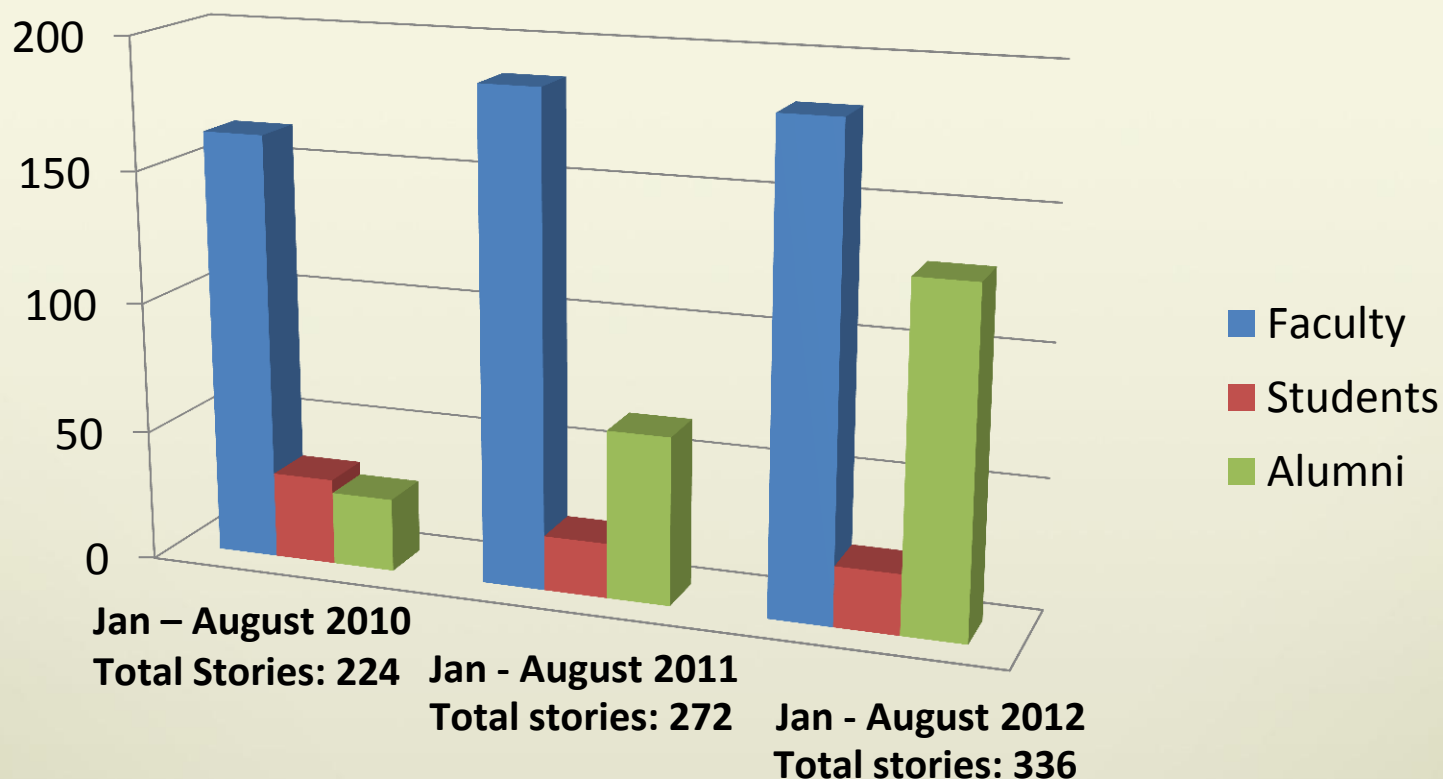
## Quality-Resource Gap

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





## National Media



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





# Home Page Update

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 Stojanovic

W&M NEWS

Professor chronicles history of 700-year-old document

Virginia Symphony series in P&K Hall to begin Oct. 6

'Gentlemen of the College' to perform in NYC on national TV

Fraternalism donates 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 10am

RIGHT NOW...

COMMENCEMENT INFO

NEWS IN VIDEO

FEATURING...

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

f
t
You Tube
v

Social Stream // W&M Blogs

The College of William & Mary  
Williamsburg, VA. [Contact Us](#)  
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Links & Resources

Alumni
Current Students
Employers
Faculty & Staff
Parents & Families
Friends & Neighbors
Careers at W&M
About this Site
Emergency Information
Policies





# MY WM Old

myWM

Content Layout  
Portal Admin

Welcome Jesse Windley  
You are currently logged in.

[B](#) [Bb](#) [email](#) [Calendar](#) [Groups](#) [wnapps](#) [Admin](#) [Logout](#) [Help](#)

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

## Information for...



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

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

## The William and Mary News

Campus News RSS

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

## Strategic Planning

### Implementation of the Strategic Plan

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

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

Celebrating Tradition  
*forging change*

## Weather Channel

Williamsburg, VA

Airport Delays  
Sporting Events  
Pollen Reports

The Weather Channel  
weather.com

74 °F  
Sunny

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

GO!

## Campus Announcements

There are no announcements

## Personal Announcements

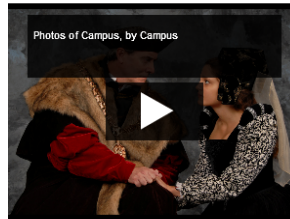
Complimentary Admission to W&M Students - Jesse Williams at Colonial Williamsburg

## Calendars & Events

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

## W&M Campus Gallery

Photos of Campus, by Campus



Submit photos to the gallery

## Know Your Rights and Responsibilities

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

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

## Sustainability at W&M

### Meeting the Challenges of a Sustainable Future

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



### Targeting Transportation

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

## IT Security Awareness

### Information Security is Everyone's Responsibility



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

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

## Bookmarks

[uPortal](#)  
[XML](#)





# MY WM Reinvented

myWM

DIRECTORY / EVENTS / W&M A-Z

WILLIAM & MARY

Summer Travels 2012

PHOTO CONTEST

Thanks to all who submitted! And the winners are...

Convocation went social and we Storified it. Relive the fun.

#wmconvocation

Banner

Blackboard

OWA

WMApps

FACULTY & STAFF LINKS

STUDENT LINKS

Academic Calendar

Course Catalog

Human Resources

Information Technology

Residence Life

Student Accounts

Student Happenings

WMDigest

W&M Express

Events

more...

SEP 13

Creating Inclusive Classrooms Brown-Bag Discussion 12:00pm

SEP 13

Boston Consulting Group Effective Interviewing Workshop 12:00pm

SEP 13

Lecture: Va. Attorney General Kenneth Cuccinelli 1:00pm

News

more...

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

W&M welcomes back Rosalind Brackenbury

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

Tweets

more...

@TribeAthletics 10:34am // 09.13.12

Tribe men's soccer heads to the nation's heartland. [#WMTribe](http://t.co/BReoJpgj)

@TribeAthletics 10:20am // 09.13.12

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

@TribeAthletics 10:14am // 09.13.12

I posted 10 photos on Facebook in the album "Tribe Tennis Newcomers" <http://t.co/KtJOUWkd>

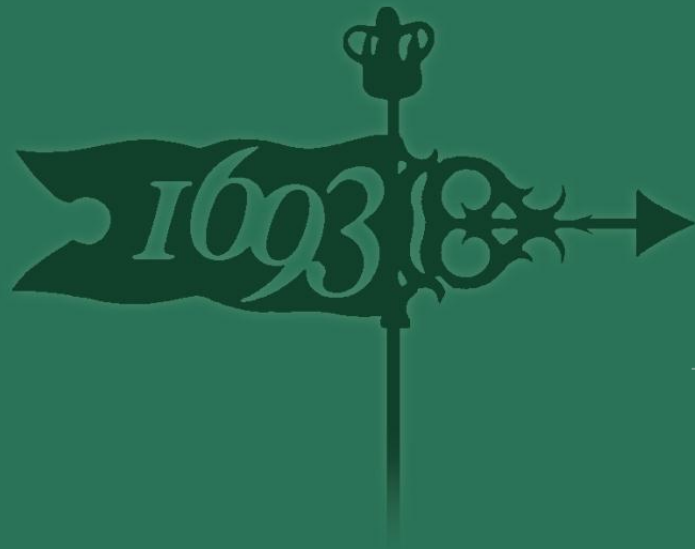
Social Stream // W&M Blogs

Careers at W&M

Policies

Emergency Information

26



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## Additional Material

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## Vision

### William & Mary: The Liberal Arts University

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



## Strategic Focus

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

**WILLIAM & MARY TOP LEVEL DASHBOARD**

Measures+		W&M 2008-09	W&M 2009-10	W&M 2010-11	W&M 2011-12	W&M 2012-13	Target	UVA* **	Brown* **
Challenge 1 – Leading Liberal Arts University									
1.	Undergraduate acceptance rate <sup>a</sup>	34%	34%	32%	35%	32% Prelim.	34%	33% (Fall 2011)	9% (Fall 2011)
2.	Undergraduate yield rate <sup>a</sup>	35%	34%	35%	33%	33% Prelim.	34%	44% (Fall 2011)	55% (Fall 2011)
3.	Undergraduate 25 <sup>th</sup> – 75 <sup>th</sup> percentile SAT score range <sup>b1</sup>	1250-1440	1240-1450	1260-1440	1240-1450	1250-1460 Prelim.	1250-1450	1240-1460 (Fall 2011)	1340-1520 (Fall 2011)
4.	Undergraduate graduation rates <sup>a</sup>	91% 2003 cohort	90% 2004 cohort	91% 2005 cohort	Avail. 5/2013 2006 cohort	Avail. 5/2014 2007 cohort	93%	93% 2004 cohort	96% 2004 cohort
5.	Student: faculty ratio <sup>b8</sup>	11:1	12:1	12:1	12:1	Avail. 2/2013	<13:1	16:1 (Fall 2011)	9:1 (Fall 2011)
6.	Undergraduate small class percentage (2-19 students) <sup>b</sup>	45%	48%	47%	48%	Avail. 2/2013	50%	53% (Fall 2011)	70% (Fall 2011)
Challenge 2 – Diversity									
7.	Undergraduate students who are members of historically underrepresented groups <sup>a9</sup>	22%	23%	25%	26%	Avail. 10/12		26% (Fall 2010)	33% (Fall 2011)
8.	Undergraduate students who are nonresident aliens <sup>a</sup>	2%	2%	3%	3%	Avail. 10/12		6% (Fall 2010)	10% (Fall 2010)
9.	Graduate/professional students who are members of historically underrepresented groups <sup>a9</sup>	13%	13%	14%	15%	Avail. 10/12		16% (Fall 2010)	21% (Fall 2010)
10.	Graduate students who are nonresident aliens <sup>a</sup>	10%	12%	11%	12%	Avail. 10/12		11% (Fall 2010)	27% (Fall 2010)
11.	Average per-borrower cumulative undergraduate debt <sup>c3</sup>	\$18,410 (2009 grads)	\$21,367 (2010 grads)	\$20,835 (2011 grads)	Avail. 12/2012	Avail. 12/2013	<\$20,000	\$20,951 (2011 grads)	\$22,455 (2011 grads)
Challenge 3 – Lifelong Connection									
12.	Alumni giving participation rate: undergraduates with degrees <sup>d</sup>	22.4%	23.4%	23.9%	Avail. 9/2013	Avail. 9/2014	30% by 2014	22% (USNews)	35.3% (FY2011)
Challenge 4 – Business Plan									
13.	US News & World Report: Financial resources rank <sup>b</sup>	88	85	97	112	Avail. 9/2013	<70	53 (2011-12)	26 (2011-12)
14.	Total sponsored program expenditures (millions) <sup>a</sup>	\$50	\$54	\$57	Avail. 4/2013	Avail. 4/2014	\$60 by 2014	\$344 (2009-10)	\$113 (2009-10)
15.	Debt Service as Percent of Operating Expense <sup>f</sup>	4.9%	6.7%	5.9%	6.6%	Avail. 9/2013	<7%	Not available	Not available
16.	Annual Total Value of Private Gifts (in millions) <sup>d6</sup>	\$51	\$43	\$41	Avail. 9/2013	Avail. 9/2014	50	\$196 (2009-10)	\$167 (2009-10)
17.	Endowment per student <sup>g</sup>	\$65,711	\$71,406	\$81,408	Avail 11/2012	Avail 11/2013		\$195,175 (FY11)	\$298,425 (FY11)
Challenge 5 – Administrative Resources and Infrastructure									
18.	All E&G Facilities Condition Index <sup>e5</sup>	11.0%	7.6%	7.8%	6.3%	Avail. 2/2013	<10%	8.7% (2010-11)	Not available
Challenge 6 – Communications									
19.	US News & World Report: National Universities <sup>b</sup> (Ranking for year data collected)	33	31 (tie)	33 (tie)	33 (tie)	Avail. 9/2013		24 (tie) (2011-12)	15 (tie) (2011-12)
20.	US News & World Report: Public Universities <sup>b</sup> (Ranking for year data collected)	6	6	6	6	Avail. 9/2013		2 (tie) (2011-12)	Not available

# Top-Level Dashboard Notes

+Preliminary list. A measure of the quality of faculty is under discussion.

\*Years vary by data availability as noted in W&M data

\*\*Denotes schools with a medical school and engineering program

<sup>a</sup> 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)

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

<sup>c</sup> From Common Data Set (or institutional website, as available)

<sup>d</sup> From Council for Aid to Education/Voluntary Support of Education

<sup>e</sup> Calculated by facilities management for submission to State Council of Higher Education

<sup>f</sup> Internal calculation using data included in the College's annual audited financial statements

<sup>g</sup> From National Association of College and University Business Officers (NACUBO)

<sup>1</sup> Calculated by adding the 25<sup>th</sup> and 75<sup>th</sup> percentiles for Critical Reading and the percentiles for Math.

<sup>2</sup> Figures are estimates for current year or actual for previous year

<sup>3</sup> 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

<sup>4</sup> 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).

<sup>5</sup> The Facilities Condition Index (FCI) is a fitness indicator for the College's facilities and infrastructure. The FCI is the ratio of known maintenance deficiencies to the current replacement value of academic facilities. Industry standards suggest that an FCI of 5% or less indicates good condition, 5% to 10% fair condition, and above 10% poor condition. "All E&G Facilities" are those facilities supported by general funds allocated by the Commonwealth. These facilities include "major" E&G facilities (classrooms, class lab facilities, Wren Building, Admissions, Blow Memorial Hall, Cohen Career Center) and "minor" E&G facilities (e.g., Jamestown Road Houses, Galt Houses, Quonset Huts, physical plant-related facilities). E&G facilities do not have a revenue generating component and exclude facilities that are self-supporting such as dormitories, athletic facilities, food service facilities.

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

<sup>7</sup> Also includes race reported as unknown and non-resident alien

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

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



## Implementation Steps as of September 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, 276 steps have been included in the plan. Of those, 195 (76%) have been completed or adopted into continuing practice, 31 are underway and 10 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	2	17	13	39	71
2012-2013	8	25	1	13	47
Total	10	56	87	123	276





## Macro Productivity Measures

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

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



## Current Initiatives

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



## Projects

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

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



## Challenge 1



Vision



### 1. Leading Liberal Arts University

FY13

- Begin implementation of recommendations from undergraduate curriculum review.
- Complete review of faculty merit and reward system.
- Expand summer study and research opportunities.
- Explore Center for Collaborative Teaching and Research.
- Expand and integrate Reves Center programs.
- Fund salaries, graduate stipends, start-up packages.



## Challenges 2, 3, 5, 6

### 2. Welcoming



### 3. Connected for a Lifetime



### 5. Staffed/ Equipped



### 6. In Touch



- Implement diversity action plans submitted by Deans in FY12.
- Actively promote Cohen Center services to alumni.
- Enhance alumni chapter engagement through increased partnership with the development office.
- Measure alumni engagement to enhance cultivation strategies.
- With the Real Estate Foundation, explore options for additional 200+ beds near campus (in addition to the fraternity housing project).
- Continue to deploy software systems to enhance business practices.



## Challenge 4

### 4. New Financial Foundation = Performance + Productivity + Philanthropy + Public Support

- Continue emphasis on annual giving.
- Implement planned strategic investment in development operations.
- Provide a \$200,000 per year Creative Adaptation Fund for three years beginning in FY13.
- Reallocate costs or increase net revenues cumulatively by five percent in each school over the next three years (FY13-15).
- Continue implementation of innovation and greater efficiency projects, add new projects, and report annual results – [www.wm.edu/innovation](http://www.wm.edu/innovation).
- Start implementation of 6-year plan including adjustments for actions taken by the General Assembly and Governor this spring.



## Our Overarching Grand Challenge

The strategic plan identifies one overarching grand challenge for the future of the university. That is to be a **leader among liberal arts universities**. The centerpiece of our strategy is to change lives for the better by being a university of **compelling academic distinction, one of the world's great liberal arts universities**. All of our other aspirations flow from this commitment.

Major actions and decisions moving forward will build on our ability to combine the best elements of a liberal arts college and a research university with select graduate and professional programs. W&M's success in blending those two aspects is our great competitive advantage. We effectively integrate teaching and scholarship and provide powerful faculty-student interaction. We will build on that foundation. We will increase our emphasis on interdisciplinary and international programs. Our special strength is **engaged learning**.





## Engaged Learning is our Special Strength

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

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

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





## Four P's of the New Financial Model

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

- 1) Performance. Outstanding results worthy of support.
- 2) Productivity. Innovation, greater efficiency and growing streams of earned income (tuition and fees, research grants and contracts, and entrepreneurial leveraging of our strengths to generate new sources of revenue)
- 3) Philanthropy. Greatly enhanced philanthropy (annual giving, endowment, funds for bricks and mortar); and
- 4) Politics. Continued support of operations and capital projects by the state, with flexibility to take advantage of William & Mary's unique strengths, building on the principles of the restructuring legislation.



## Highlights FY13 – Challenge 1

### Challenge 1 –

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



## Highlights FY13 – Challenges 2 and 3

### Challenge 2 –

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

### Challenge 3 –

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



## Highlights FY13 – Challenge 4

### Challenge 4 –

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



## Highlights FY13 – Challenges 5 and 6

### Challenge 5 –

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

### Challenge 6 –

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