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# Strategic Planning

## Joint Board Discussion

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January 2014



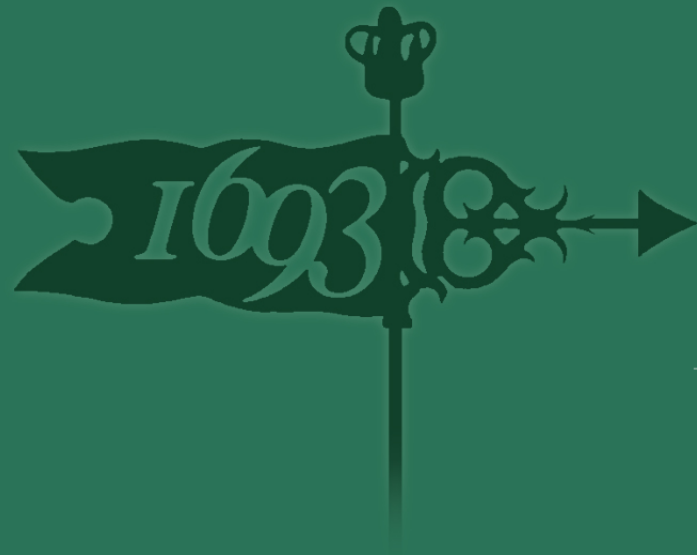
## What's Been Happening This Winter?





## Agenda

- Strategic Planning Update – Michael Halleran and Jim Golden
- Business Innovation Review – Mark Finlan, Censeo Consulting Team Leader
- E-Learning Strategy – Gene Roche



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# Strategic Planning

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# Strategic Plan

[www.wm.edu/strategicplanning](http://www.wm.edu/strategicplanning)



**Welcoming**



**Staffed/  
Equipped**

**Leading Liberal Arts University**



**Global**



**Connected  
for a Lifetime**



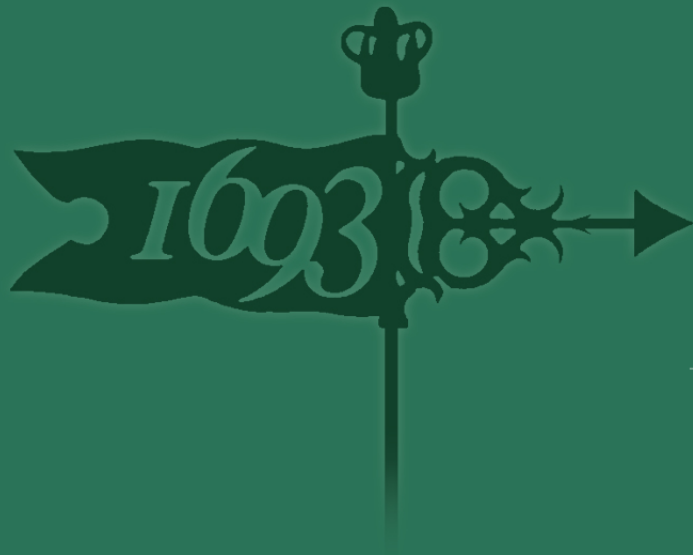
**In Touch**

**New Financial Foundation**



## Promise Implementation

1. IS UG Continuing-- tuition tied to inflation	In place for Classes of '14, '15, '16; Compute inflation adjustments each year
2. IS UG Incoming-- 4-Year tuition	In place for Classes of '17, '18, '19
3. IS UG-- Reduced net tuition for most middle class and reduced loan burden for students with demonstrated need	Increased grants and reduced borrowing for families with demonstrated need and incomes up to \$100K will translate into lower net tuition and lower graduation debt for '17
4. Increase IS UG by 150 over four years	New Promise slots will start being added in fall 2014.
5. Track admission impacts	No impact on Class of '17 quality; strong early admission for '18; assess impact of OOS tuition and recognize elasticity constraints
6. Salaries-- Over 5-Year period, faculty to 60 <sup>th</sup> percentile and staff competitive	In July '13, 2 percent state increases for all, 4% additional merit pool for faculty and 2% merit pool for staff.
7. Academic innovation (consider full load, dual responsibilities, NTE integration)	By April '14, all schools develop policies for appropriate balances between dual responsibilities as scholars and teachers and implement in 2014-2015. Reports submitted by Deans in Jan '14.
8. Administrative innovation and efficiency	Review of key areas of administrative operations. Consultant began work in Jan '14. Initial findings by April '14.
9. Philanthropy	Smooth VP transition. Record-breaking cash in 2012-2013. Renewed focus on lifetime culture of philanthropy and greater regional emphasis in FY14 and beyond.



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# Business Innovation

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## Goals

- Together. This effort is part of the W&M Promise, which requires contributions from earned income, philanthropy and innovation on campus to sustain W&M as a public ivy. We are all in this together and we will all benefit from our common success.
- Strategic Priorities. We want to reallocate funds to the priorities in our strategic plan.
- Operational Excellence. We want to enhance operational excellence across all of our business processes. We think we are lean, but that does not always mean we are efficient. We want to streamline our processes, reduce frustration and shift our time and resources to our highest priorities.
- Innovation. We have a history of innovation. We have been at this for some time and we have made progress in reallocating funds, finding net new revenues, and exploring creative adaptation. We want to build on that success. Even a leader can always improve. 8





## Business Innovation Steering Committee

In 2013-14 retain an outside firm to assess W&M's operations and make recommendations to achieve additional efficiencies. This will not include academic programs, but will include business processes in the various schools.

### Steering Committee

Co-chairs (Provost Michael Halleran, VP Jim Golden)

Bob Archibald, Professor of Economics

Courtney Carpenter, Associate Provost and CIO

Bill Cooke, Professor of Physics

Kate Conley, Dean of the Faculty of Arts and Sciences

Dave Douglas, Dean of the School of Law

Sam Jones, VP Finance

Jennifer Latour, Chief Financial and Admin Officer, VIMS

Anna Martin, VP Administration

George Rudebusch, Undergraduate '16

Lisa Szykman, Associate Professor, School of Business

Tom Watkins, Board of Visitors

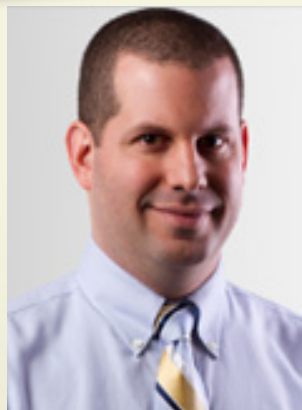


## Timeline

- October 2013: Issued RFP for an 8-10 week “blitz diagnostic”; included the option to continue work on areas identified as having the greatest promise for smoother processes, cost reduction, cost avoidance or net new revenue.
- December 2013: Contract with Censeo Consulting. Established W&M teams in each process area.
- January 2014: Censeo began 11-week review of processes including IT, HR, Finance, Facilities, Procurement. Julie Summs arrived as Director of Economic Development and Business Innovation.
- March 2014: Steering Committee reviews findings and recommends next steps to President.
- April 2014: Discuss results with BOV. Recommendations for further work in selected areas, phased over time.



# Introductions



**Mark Finlan**

**Managing Director &  
Higher Ed Practice Leader**

- Mark has over 13 years of strategy, operations, and technology experience, including deep expertise with higher education and the federal government
- He has led numerous large-scale org improvement and effectiveness projects across the public and private sectors
- Mark heads Censeo's higher education practice and is overseeing Censeo's current work with Georgetown University
- Mark's previous higher education experience includes work with UNC, Cornell, Berkeley, Stony Brook, and Georgetown
- Prior to Censeo, Mark worked at Bain & Company, where he won the Bain Results Challenge award for the most impactful project across North and South America (this is one of the most prestigious awards at Bain)
- Mark holds an MBA from the University of North Carolina-Chapel Hill and a B.S. in physics and mathematics from The College of William & Mary



**Dick Mann**

**Senior Client Advisor**

- Dick Mann, has over 40 years' experience overseeing administrative functions at universities
- Most recently, Dick served as the Vice Chancellor for Finance and Administration at UNC where he oversaw financial operations, campus services and facilities planning, and was part of the Chancellor's Cabinet, university Budget Committee and UNC Management Company board
- Dick was UNC's project lead on the Carolina Counts initiative which has realized over \$55M/year in savings
- Prior to UNC, Dick worked as VP for Administration at SUNY Stony Brook, Director of Administration at the University of Kansas and Director of Management Information Systems at the University of Illinois.
- Dick has a Ph.D. in Higher Education Administration from the University of Illinois, an M.S. in Industrial Administration from Purdue University and a B.S. in business management from Long Island University





# Censeo experience

## Public Sector Clients



## Higher Ed Clients



- Note: “Higher Ed Clients” includes universities that members of the proposed leadership team have worked with or for





## Progress to date

- Over 125 interviews completed with another 100 + expected in next 3 weeks
  - Includes faculty and staff, from the Provost, VPs, and Deans down to the front-line operations staff
- Benchmarking study is underway including:
  - Peer performance: Selected 17 schools for operational benchmarks; subset of 8 have agreed to provide additional data for comparison
  - Standards: Comparison to accepted for functional area management standards (e.g., APPA)
  - Internal performance: School-by-school and department-by-department comparison across W&M
- Analyzing internal data including procurement, finances, HR, org structure, and operations to identify, verify and/or size opportunities



## What have we heard? Opportunities to ...



Improve Organization Effectiveness (enabler)



## Overall timeline (through end of March)

### Results Workshop (Week 2 - complete)

- Agree on objectives and messaging around project purpose and importance
- Define project success (i.e., results that you hope to achieve)
- Brainstorm hypotheses on high potential opportunities

### Baseline Assessment (Week 5)

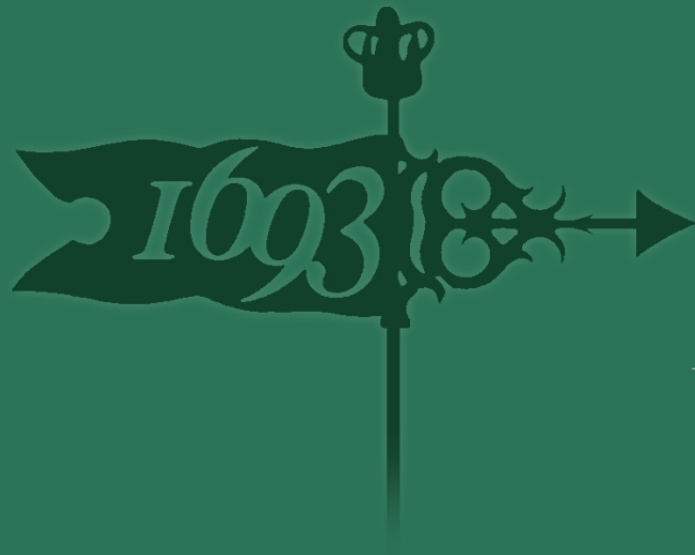
- Review completed fact base findings
  - Largest cost pools
  - University structure and processes
  - Benchmarks
- Discuss emerging hypotheses on high potential opportunities

### Opportunity Discussion (Week 9)

- Share detailed analysis for each high potential opportunity
- Quantify estimated value for each available option

### Path Forward (Week 11)

- Recommend potential path forward and opportunities to pursue including prioritization, sequencing, and resource requirements



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# E-Learning Strategy

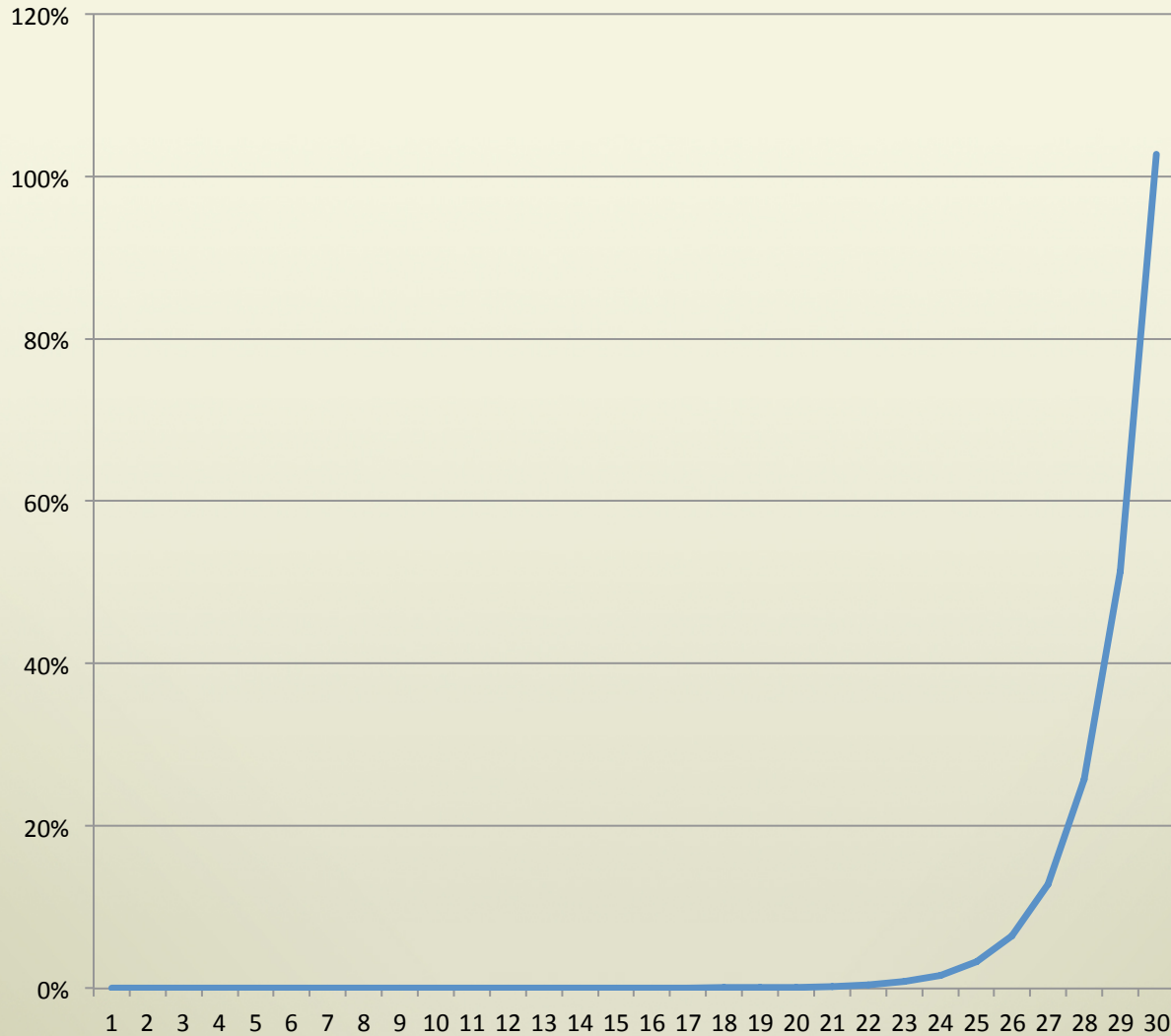
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# The Growth of Computer Power



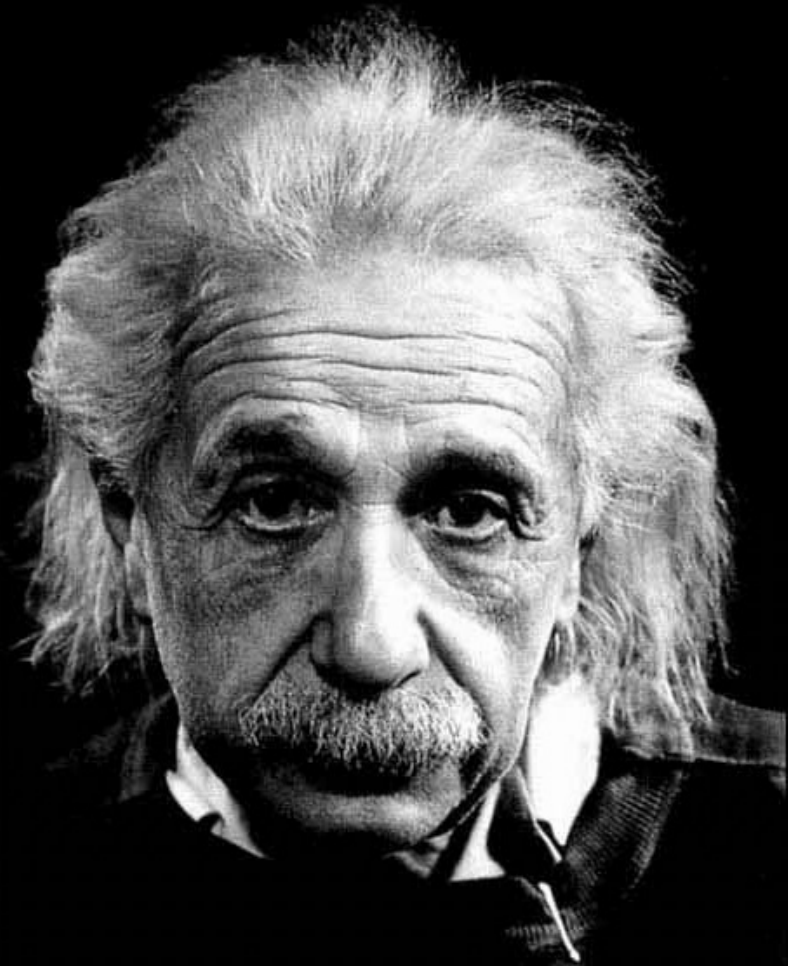


## New Opportunities for Learning

- Blended, Hybrid Learning
- Individualization
- Data Analytics
- Mastery Learning
- Gamification
- Internationalization
- Augmented Reality
- 3-D Printing

“Everything should be made  
as simple as possible,  
but not simpler.”

Albert Einstein

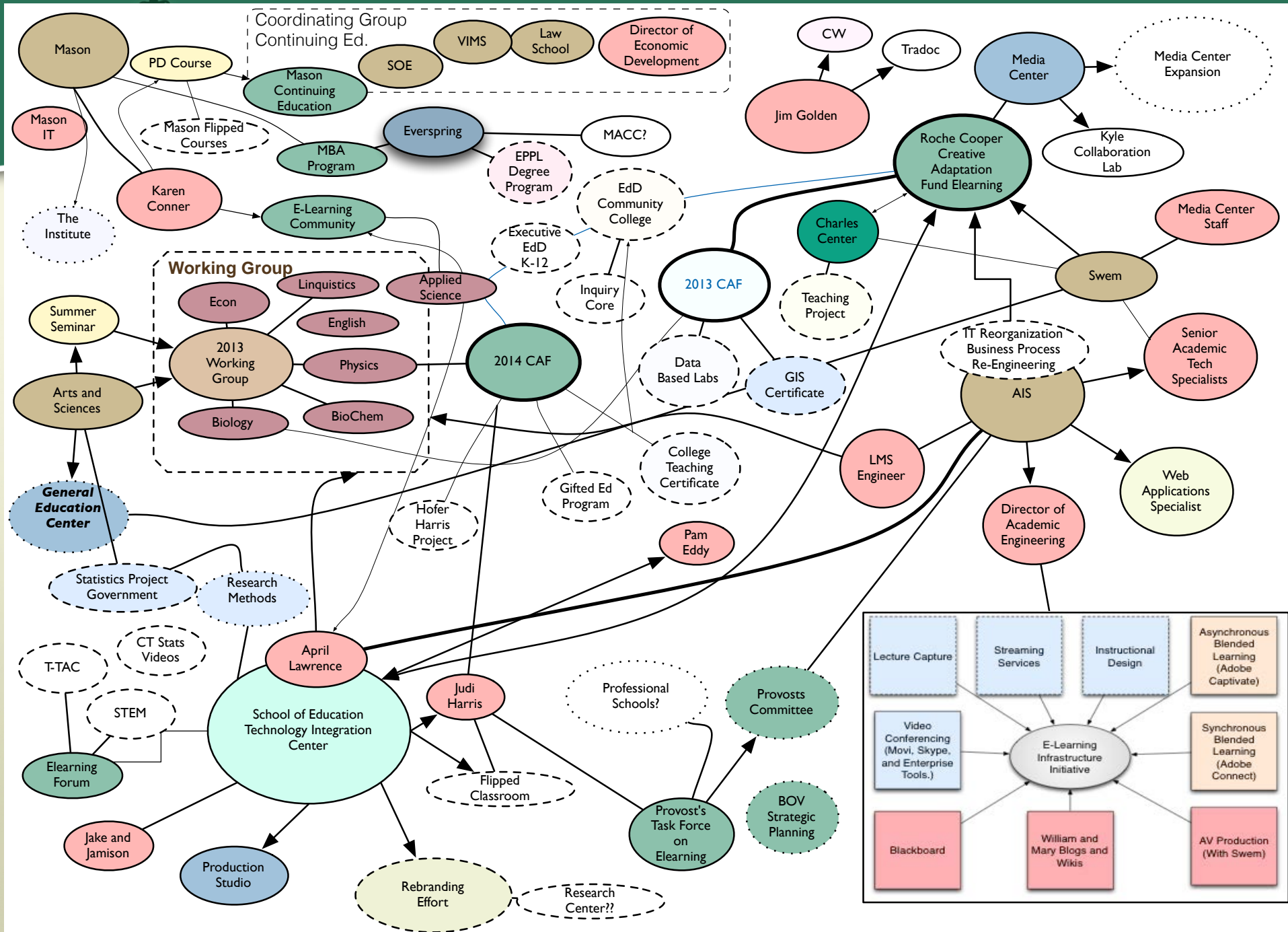




## A Somewhat Simple View of E-Learning at W&M

- Provost's Committee on E-Learning
- E-learning at Mason School of Business
- Creative Adaptation Fund Progress
- E-learning Initiatives in Arts and Sciences
- E-learning Initiatives in the School of Ed.
- E-learning at Swem Library
- MOOC with CW







# Provost's Committee on E-Learning

## Undergraduate Research Experience

Faculty Mentors

Resources for WMSURE  
Students

Resources for WMSURE  
Faculty Mentors

Current WMSURE  
Students

WMSURE Alumni

Support WMSURE

Welcome Class of 2017!

STAND UP AND BE  
COUNTED

Interviewers

Research Ethics

Contact Us

Departments & Programs ▼



## Paul D. Heideman Professor of Biology

Office : Millington Hall 202

Office Phone : 757-221-2239

Fax : 757-221-6483

Email : [pdheid@wm.edu](mailto:pdheid@wm.edu)

### Courses Taught

Memory and Learning: A Practical Guide for Students (BIOL 115), Integrative Biology I: Animals (BIOL 302), Principles of Animal Physiology (BIOL 432, with lecture and laboratory), How Students Learn (BIOL 455)

### About Paul

Paul grew up in India as much as in the USA, and has spent time as a researcher in the Philippines, Mexico, Costa Rica, and Trinidad. He earned a Master's in Zoology (1984) and Ph.D. in Evolutionary Ecology in 1987 from the University of Michigan, Ann Arbor. After earning his Ph.D., Paul spent time at the Smithsonian Institution, and then nearly six years at the University of Texas, Austin, as a postdoctoral researcher studying the brain, hormones, and fertility. He joined the faculty in the Department of Biology in 1994, where he served a five-year term as Department Chair from 2004-2009. More recently, he has been working with faculty in Geology and the School of Education to help recruit and prepare new middle school and high school science and mathematics teachers. He has over 20 scientific publications with undergraduate student coauthors, and over 60 scientific publications in total. A new area of his research looks at ways to improve learning for students.



## School of Education

- Five Creative Adaptation Proposals
- Executive EdD Program
- Gifted Education Proposal
- Certificate in College Teaching
- EdD in Community College Leadership
- Judi Harris's Course: Flipping Your Class
- Technology Integration Center Expansion



## Arts and Sciences

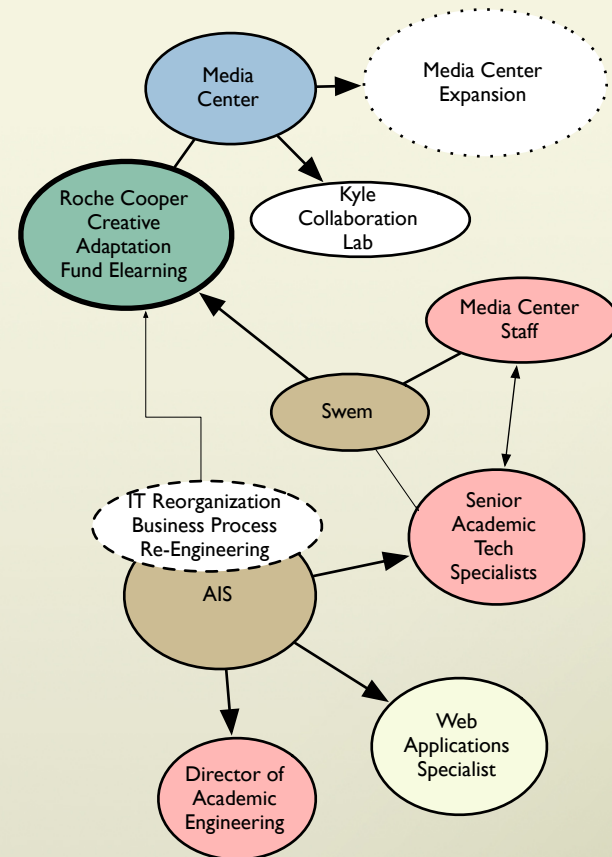
- Two Fully Online Summer Courses
- Creative Adaptation Biology Grant
- Flipped Class in English Literature
- Flipped Class in Computer Science
- Fully Flipped Applied Science Courses





# Swem Library

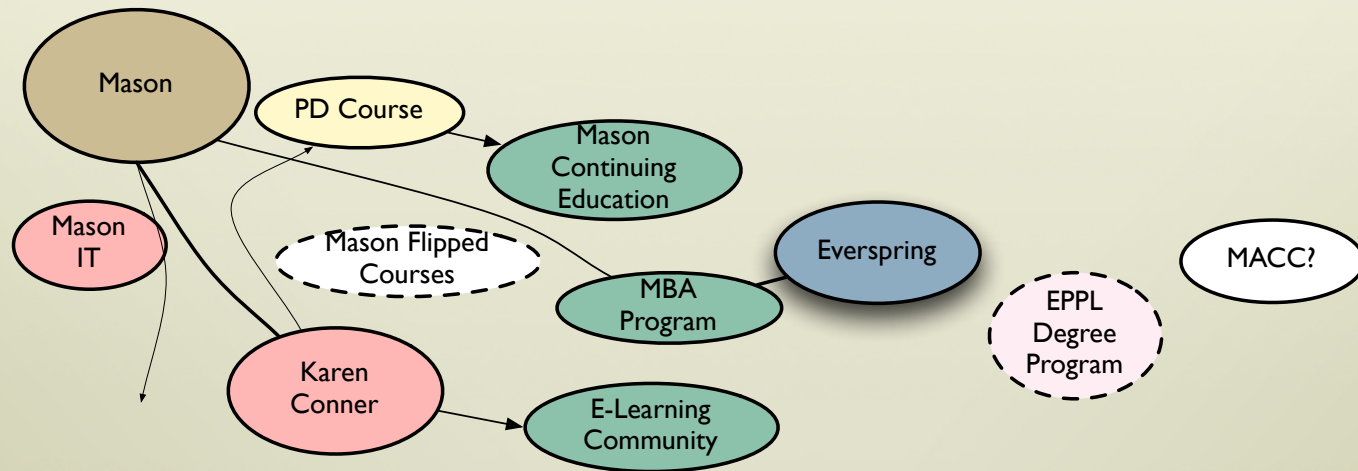
- Kyle Collaboration Lab
- Media Center
- Media Center Expansion
- 2013-2014 Creative Adaptation Fund





# Mason

- MBA Program
- Continuing Education
- Undergraduate Flipped Classroom
- William and Mary Elearning Community





## Strategy Challenge

- How do we build and **expand our capacity** to use these new technologies effectively in our traditional teaching and learning?
- Do we want to expand our outreach to working professionals who want/need additional education to accomplish their professional and personal goals?



## MOOC Collaboration with CW

- W&M and the Colonial Williamsburg Foundation are partnering to explore a Massive Open Online Course (MOOC) about the American Revolution targeted on a wide range of continuing education students
- The purposes are to help branding, stay in touch with emerging technologies, produce something of very high quality drawing on the unique assets of both organizations and to reach a broad audience interested in American history.
- The partners are developing a detailed proposal and will seek donor support
- Jim Whittenburg, PhD has a central role as course director for curriculum development and course content and he will serve as the lead instructor. He is the Pullen Professor of History, Director of Graduate Studies, at William & Mary, specializing in colonial America and early national history.

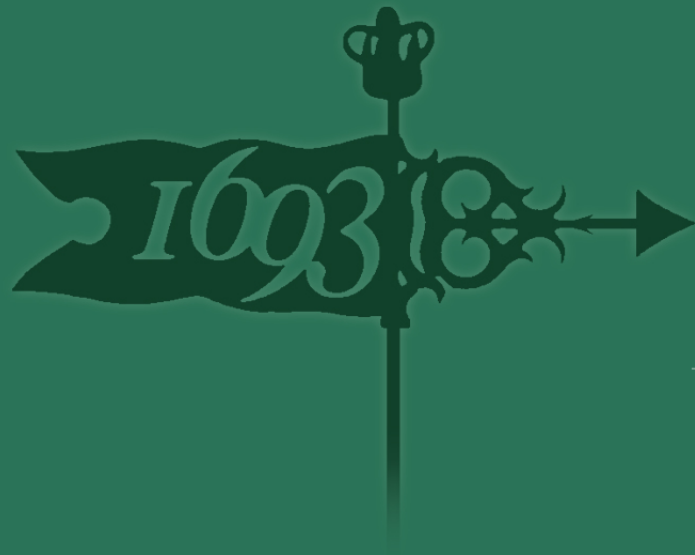




## MOOC Collaboration with CW

- The Colonial Williamsburg Foundation's Educational Media and Productions departments bring innovative and award winning education, history and production skills to the partnership. Assets such as museum and library collections, publications, photography and video production facilities, as well as instructional design expertise will contribute to the partnership's success.
- The current plan is to develop a detailed proposal this winter, identify funding opportunities in the spring, refine plans in the summer, begin production in the fall of 2014 and be ready to launch in the fall of 2015.





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January 2014



## Number 1!

- Top public university – For professors committed to teaching – and third overall behind just Princeton and Dartmouth: *USNWR*
- Top university, public or private, for graduates who start their careers in public service: *Washington Monthly/Aspen Institute*
- Top public university for percentage of undergraduate students who study abroad (45.7 %): *Institute for International Education*
- Top public university in number of student Fulbright awards per FTE enrollment, and behind only Princeton overall: *Chronicle of Higher Education*.
- Top public university for students who pay back debt – Lowest default rate (.8%) of any four-year public: *US Dept of Education*