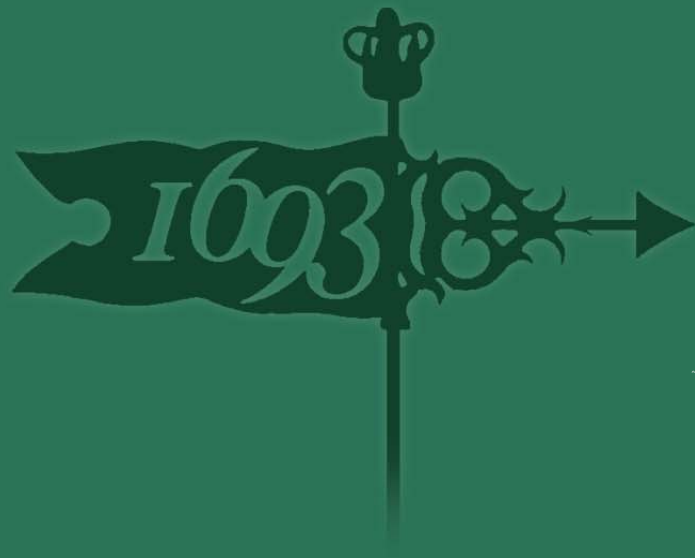


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# Strategic Initiatives and New Ventures

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September 2013



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# University Dashboard

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# Top-Level Dashboard

Measures+	W&M 2009-10	W&M 2010-11	W&M 2011-12	W&M 2012-13	W&M 2013-14
Leading Liberal Arts University					
Undergraduate acceptance rate <sup>a</sup>	34%	32%	35%	32%	33%
Undergraduate yield rate <sup>a</sup>	34%	35%	33%	33%	32%
Undergraduate 25 <sup>th</sup> – 75 <sup>th</sup> percentile SAT score range <sup>b1</sup>	1240-1450	1260-1440	1240-1450	1250-1460	1270-1460
Undergraduate graduation rates <sup>a</sup>	90% 2004 cohort	91% 2005 cohort	90% 2006 cohort	Avail. 5/2014 2007 cohort	Avail. 5/2015 2007 cohort
Student: faculty ratio <sup>b8</sup>	12:1	12:1	12:1	12:1	Avail. 3/2014
Undergraduate small class percentage (2-19 students) <sup>b</sup>	48%	47%	48%	49%	Avail. 2/2014
Diversity					
Undergraduate students who are members of historically underrepresented groups <sup>a9</sup>	23%	25%	26%	27%	Avail. 10/2013
Undergraduate students who are nonresident aliens <sup>a</sup>	2%	3%	3%	4%	Avail. 10/2013
Graduate/professional students who are members of historically underrepresented groups <sup>a9</sup>	13%	14%	15%	16%	Avail. 10/2013
Graduate students who are nonresident aliens <sup>a</sup>	12%	11%	12%	13%	Avail. 10/2013
Average per-borrower cumulative undergraduate debt <sup>c3</sup>	\$21,367 (2010 grads)	\$20,835 (2011 grads)	\$24,344 (2012 grads)	Avail. 2/2014 (2013 grads)	Avail. 2/2015 (2014 grads)

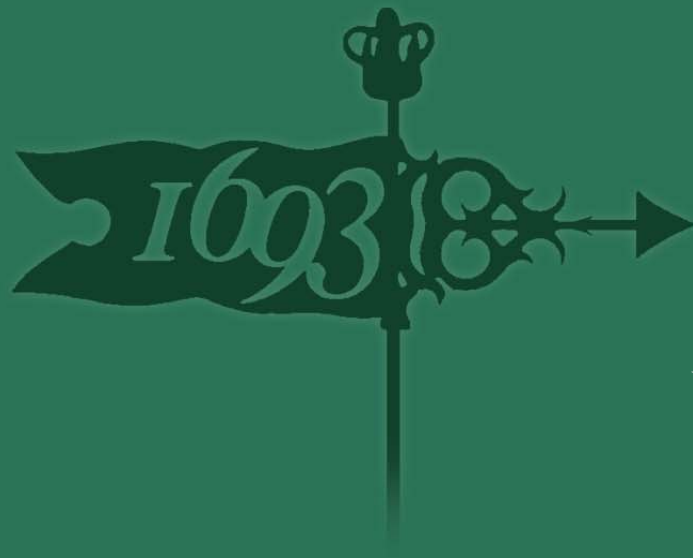


## Top-Level Dashboard Continued

Measures+	W&M 2009-10	W&M 2010-11	W&M 2011-12	W&M 2012-13	W&M 2013-14
Lifelong Connection					
Alumni giving participation rate: undergraduates with degrees <sup>d</sup>	23.4%	23.9%	Avail. 9/2013	Avail. 9/2014	Avail. 9/2015
Business Plan					
US News & World Report: Financial resources rank <sup>b</sup>	85	97	112	114	Avail. 9/2014
Total sponsored program expenditures (millions) <sup>a</sup>	\$54	\$57	\$55	Avail. 4/2014	Avail. 4/2015
Debt Service as Percent of Operating Expense <sup>f</sup>	6.7%	5.9%	6.6%	Avail. 9/2013	Avail. 9/2014
Annual Total Value of Private Gifts (in millions) <sup>d6</sup>	\$43	\$41	Avail. 9/2013	Avail. 9/2014	Avail. 9/2015
Endowment per student <sup>g</sup>	\$71,406	\$81,408	\$82,870	Avail 11/2013	Avail 11/2014
Administrative Resources and Infrastructure					
All E&G Facilities Condition Index <sup>e5</sup>	7.6%	7.8%	6.3%	6.9%	Avail. 2/2014
Communications					
US News & World Report: National Universities <sup>b</sup> (Ranking for year data collected)	31 (tie)	33 (tie)	33 (tie)	32 (tie)	Avail. 9/2014
US News & World Report: Public Universities <sup>b</sup> (Ranking for year data collected)	6	6	6	6	Avail. 9/2014

**WILLIAM & MARY TOP LEVEL DASHBOARD**

Measures+	W&M 2009-10	W&M 2010-11	W&M 2011-12	W&M 2012-13	W&M 2013-14	Target	UVA* **	Brown* **
Leading Liberal Arts University								
Undergraduate acceptance rate <sup>a</sup>	34%	32%	35%	32%	33%	34%	30% (Fall 2012)	10% (Fall 2012)
Undergraduate yield rate <sup>a</sup>	34%	35%	33%	33%	32%	34%	42% (Fall 2012)	56% (Fall 2012)
Undergraduate 25 <sup>th</sup> – 75 <sup>th</sup> percentile SAT score range <sup>b1</sup>	1240-1450	1260-1440	1240-1450	1250-1460	1270-1460	1250-1450	1260-1460 (Fall 2012)	1320-1530 (Fall 2012)
Undergraduate graduation rates <sup>a</sup>	90% 2004 cohort	91% 2005 cohort	90% 2006 cohort	Avail. 5/2014 2007 cohort	Avail. 5/2015 2007 cohort	93%	94% 2005 cohort	95% 2005 cohort
Student: faculty ratio <sup>b8</sup>	12:1	12:1	12:1	12:1	Avail. 3/2014	<13:1	16:1 (Fall 2012)	8:1 (Fall 2012)
Undergraduate small class percentage (2-19 students) <sup>b</sup>	48%	47%	48%	49%	Avail. 2/2014	50%	54% (Fall 2012)	70% (Fall 2012)
Diversity								
Undergraduate students who are members of historically underrepresented groups <sup>a9</sup>	23%	25%	26%	27%	Avail. 10/2013		27% (Fall 2011)	33% (Fall 2011)
Undergraduate students who are nonresident aliens <sup>a</sup>	2%	3%	3%	4%	Avail. 10/2013		6% (Fall 2011)	11% (Fall 2011)
Graduate/professional students who are members of historically underrepresented groups <sup>a9</sup>	13%	14%	15%	16%	Avail. 10/2013		17% (Fall 2011)	22% (Fall 2011)
Graduate students who are nonresident aliens <sup>a</sup>	12%	11%	12%	13%	Avail. 10/2013		12% (Fall 2011)	27% (Fall 2011)
Average per-borrower cumulative undergraduate debt <sup>c3</sup>	\$21,367 (2010 grads)	\$20,835 (2011 grads)	\$24,344 (2012 grads)	Avail. 2/2014 (2013 grads)	Avail. 2/2015 (2014 grads)	<\$20,000	\$21,591 (2012 grads)	\$23,521 (2012 grads)
Lifelong Connection								
Alumni giving participation rate: undergraduates with degrees <sup>d</sup>	23.4%	23.9%	Avail. 9/2013	Avail. 9/2014	Avail. 9/2015	30% by 2014	23% (USNews)	35.3% (FY2011)
Business Plan								
US News & World Report: Financial resources rank <sup>b</sup>	85	97	112	114	Avail. 9/2014	<70	55 (2012-13)	24 (2012-13)
Total sponsored program expenditures (millions) <sup>a</sup>	\$54	\$57	\$55	Avail. 4/2014	Avail. 4/2015	\$60 by 2014	\$354 (2010-11)	\$121 (2010-11)
Debt Service as Percent of Operating Expense <sup>f</sup>	6.7%	5.9%	6.6%	Avail. 9/2013	Avail. 9/2014	<7%	Not available	Not available
Annual Total Value of Private Gifts (in millions) <sup>d6</sup>	\$43	\$41	Avail. 9/2013	Avail. 9/2014	Avail. 9/2015	50	\$219 (2010-11)	\$164 (2010-11)
Endowment per student <sup>g</sup>	\$71,406	\$81,408	\$82,870	Avail 11/2013	Avail 11/2014		\$195,175 (2010-11)	\$298,425 (2010-11)
Administrative Resources and Infrastructure								
All E&G Facilities Condition Index <sup>e5</sup>	7.6%	7.8%	6.3%	6.9%	Avail. 2/2014	<10%	7.5% (2011-12)	Not available
Communications								
US News & World Report: National Universities <sup>b</sup> (Ranking for year data collected)	31 (tie)	33 (tie)	33 (tie)	32 (tie)	Avail. 9/2014		23 (tie) (2012-13)	14 (tie) (2012-13)
US News & World Report: Public Universities <sup>b</sup> (Ranking for year data collected)	6	6	6	6	Avail. 9/2014		2 (tie) (2012-13)	Not applicable <sup>5</sup>



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# Promise Implementation

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# Promise Implementation

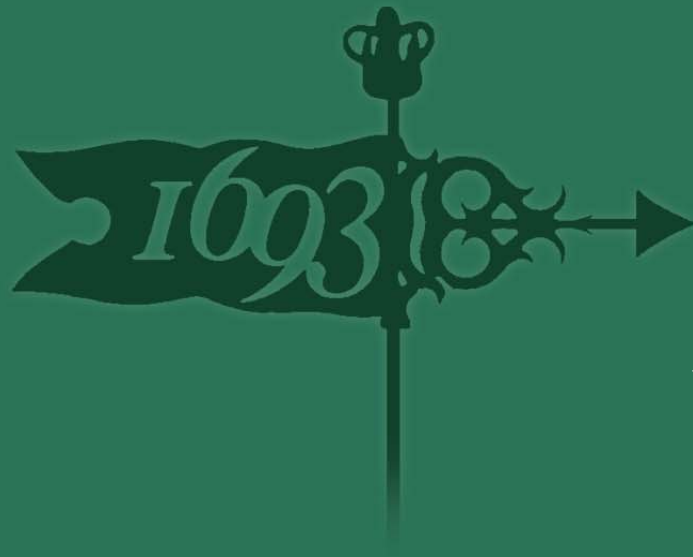
- Discussed at retreat in August
- Expanded to emphasize tracking OOS tuition impacts
- Will continue to track implementation through this committee



## 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 overall entering Class of '17 quality; 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 2013, 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 2014, all schools develop policies for appropriate balances between dual responsibilities as scholars and teachers and implement in 2014-2015.
8. Administrative innovation and efficiency	Review of key areas of administrative operations. Consultant RFP by 10/13. Initial findings by 4/14.
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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## Business Innovation

- 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.
  - August-September 2013: Reviewed existing studies and RFPs; Formed steering committee; Refining draft RFP
  - October 2013: Issue RFP for a “blitz diagnostic”; include the option to continue work on areas identified as having the greatest promise.
  - December 2013: Select consultant and issue contract.
  - March 2014: Complete diagnostic phase. Review potential savings. Identify scope of work and costs for a deeper dive in targeted areas.
  - April 2014: Discuss progress and next steps with the BOV.



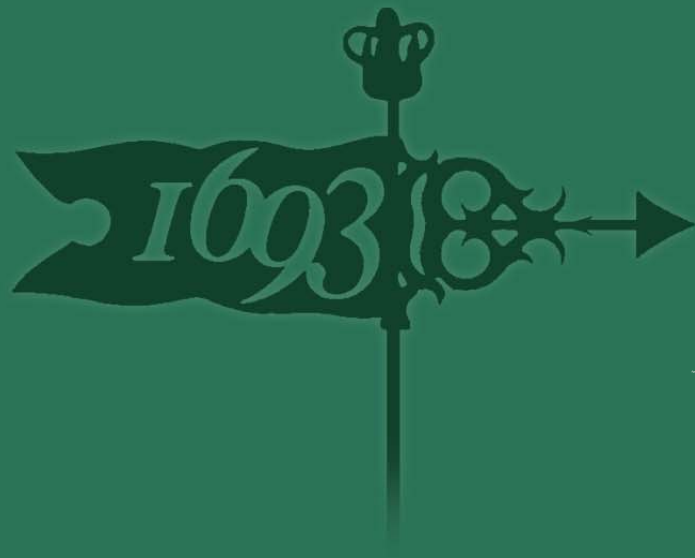
## Business Innovation Steering Committee

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



## Anticipated Scope

- Procurement
- IT
- HR
- Finance
- Facilities
- Customer Relationship Management
- Marketing of W&M Branded Items
- Consider Other Areas Recommended by Consultant



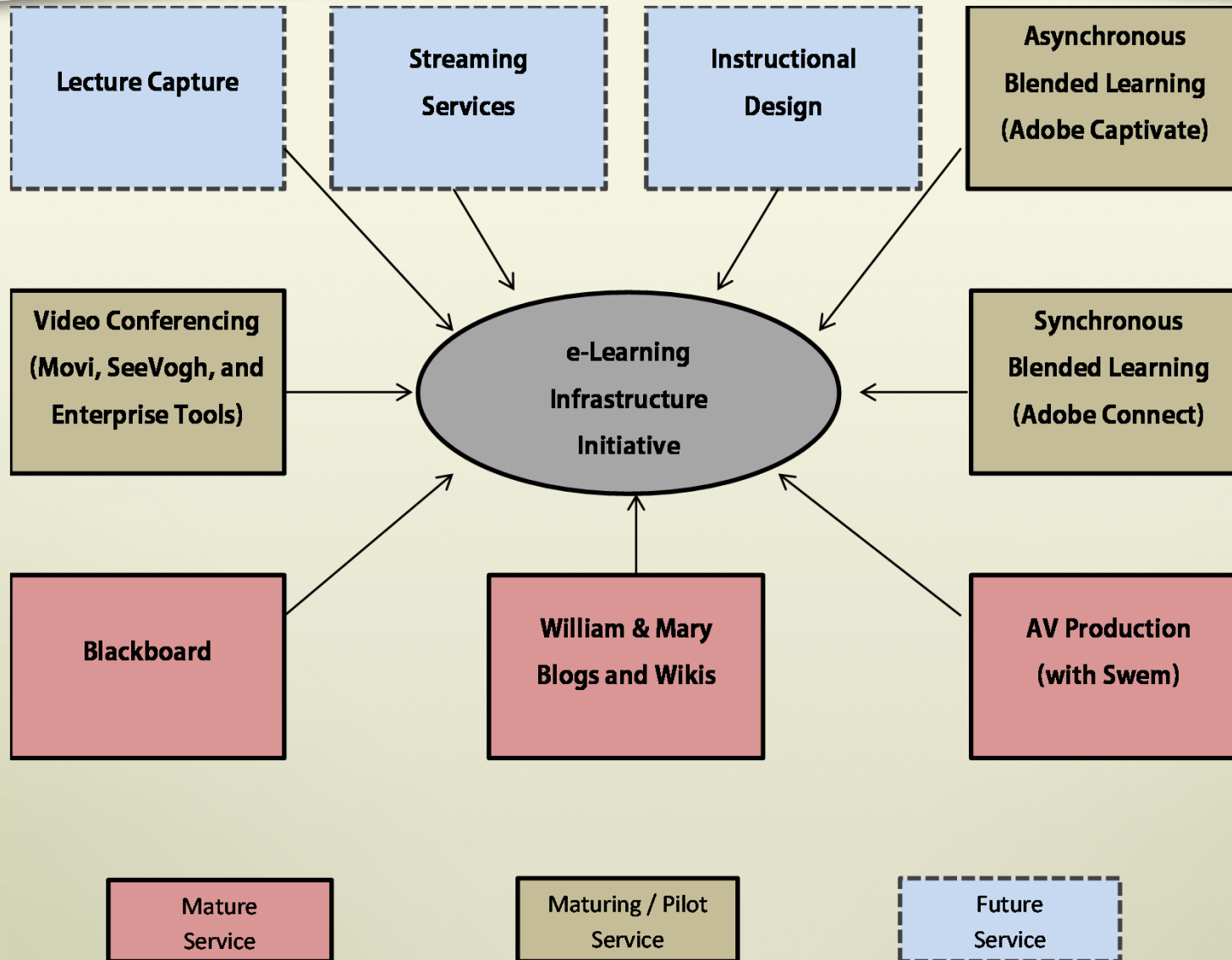
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# IT E-Learning Issues

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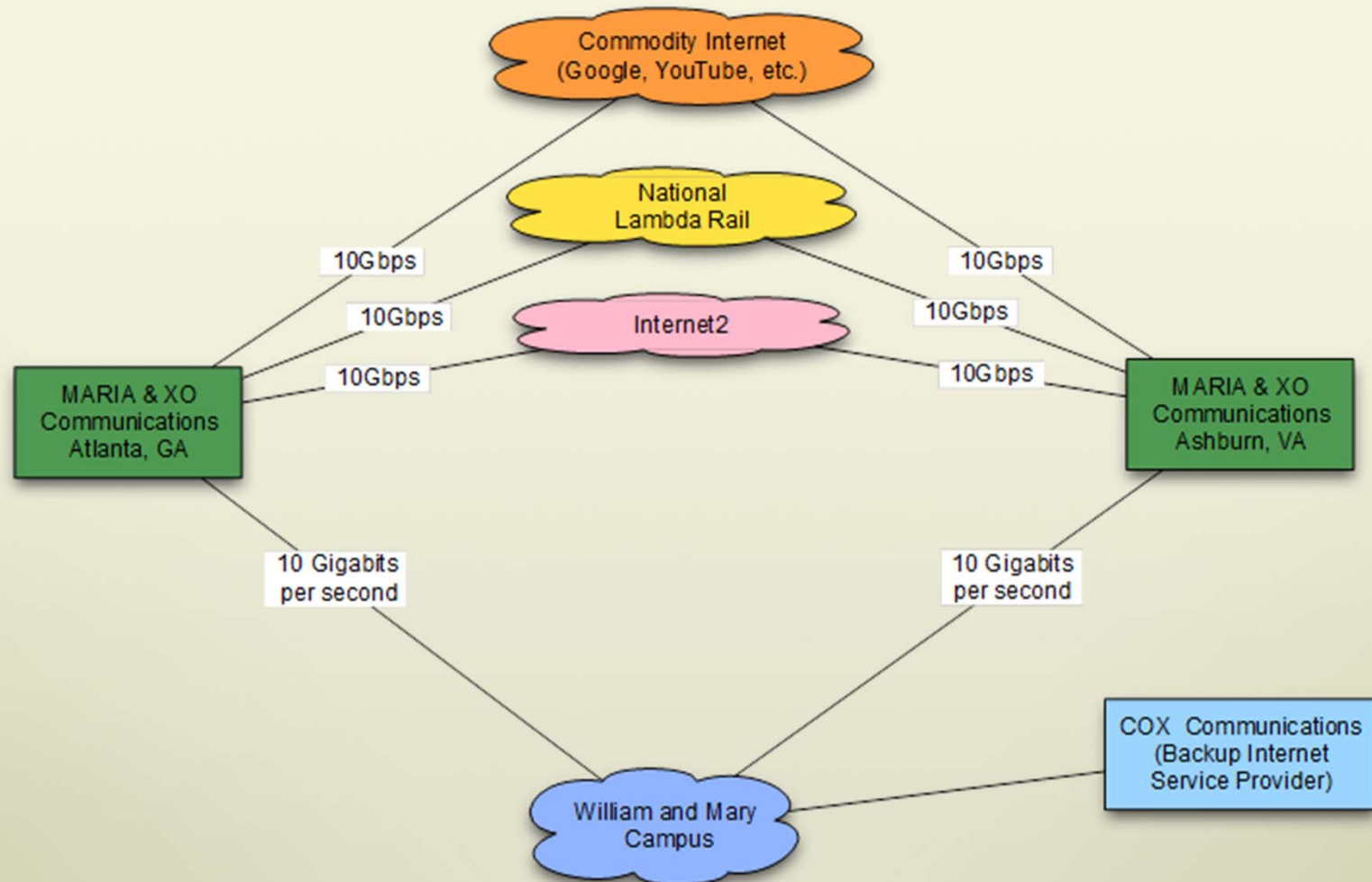


# E-Learning Infrastructure Initiative





# Internet Architecture Design

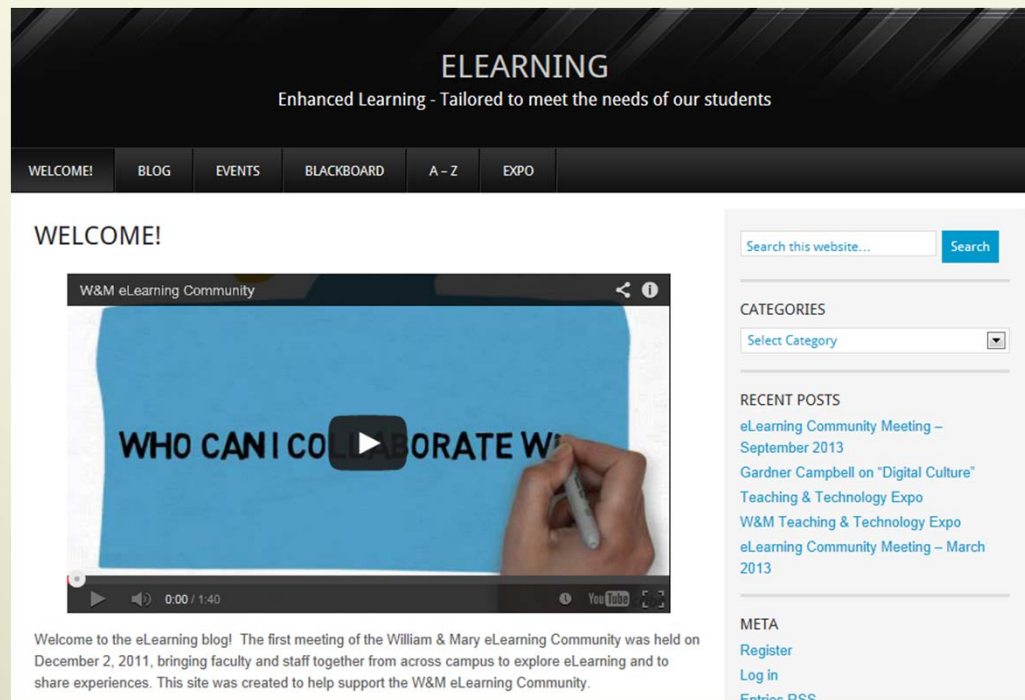






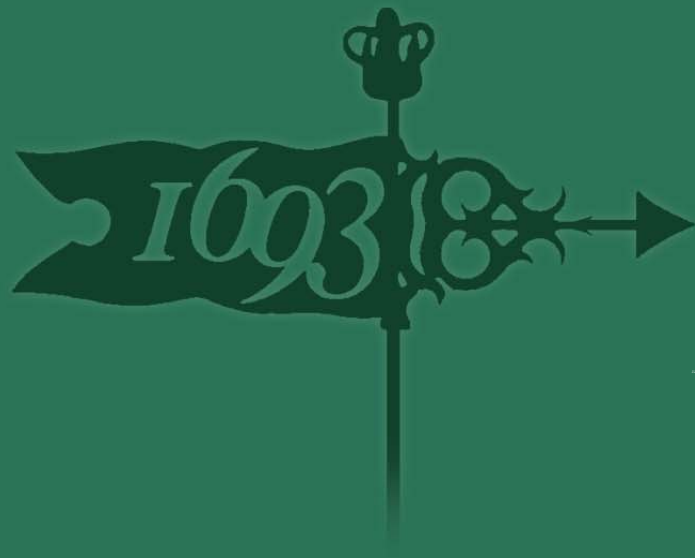
## E-Learning Blogs

- <http://elearning.blogs.wm.edu/>



- <http://at.blogs.wm.edu/>





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# Communications Update

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## W&M Communications Hub



Development:  
Marketing,  
Communications &  
Stewardship (16)

Strategic Initiatives:  
University Relations and  
Creative Services (21)

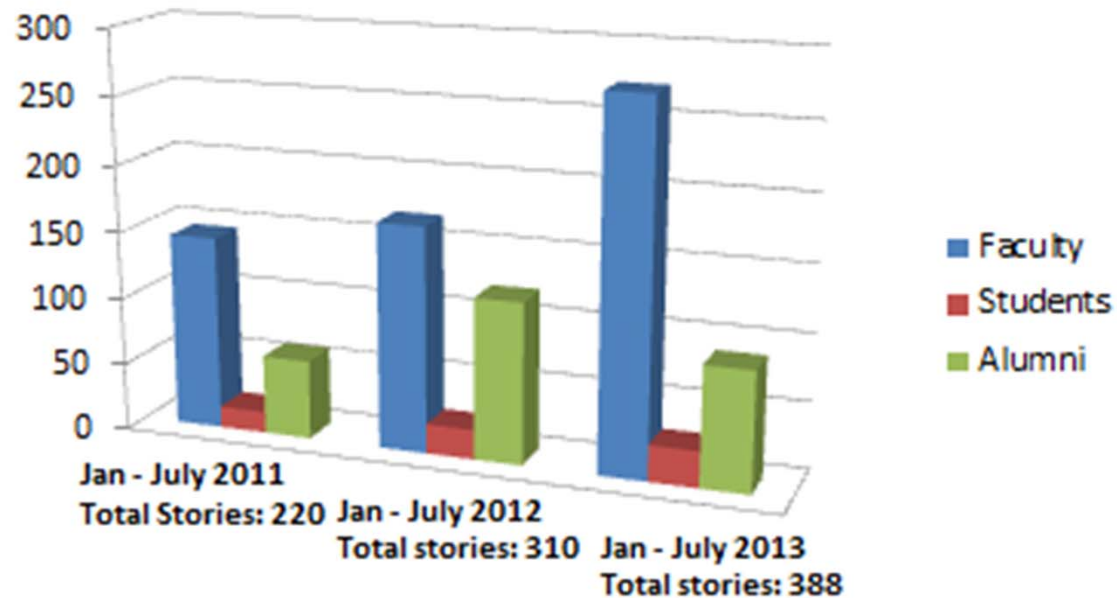




## Reputation: Promote the W&M Faculty



### 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.*



## Media Studio



- Broadcast Interviews
- Video Recordings
- Video Conferences





**AidData**  
Open Data for International Development

### Current Stats:

Amounting to **financial commitments** of: \$71.73 B

### Recent Changes:

Loading...

**Coming Soon: Geocoded Data!**

See **preliminary maps** of Chinese development finance in Africa →

**HELP US IMPROVE THE DATA**

**COMING SOON: GEOCODED DATA**

**See the Big Picture** >

## Country-Level Perspective

### Project-Level Data

Download Data ›

### In the News:

**Increase 'Chinalisation' of Uganda Could Boomerang –**  
allAfrica, 6 days ago

Economic ties between China and Africa have grown steadily over the years, as reflected in trends of aid to and trade with Africa in recent years. For instance, by last year, trade between Africa and China stood at \$200bn compared to \$9bn

### Recent Tweets:

## Tweets

**Publications:**

**Brad Parks, Vijaya Ramachandran and Austin Strange:**  
[Why We Need Better Data on Chinese Aid](#). Editorial – Devex  
Impact, 2013

Austin Strange, Brian O'Donnell, Daniel Gamboa, and  
Bradley Parks: AidData's Media-Based Data Collection  
Methodology. Version 1.0. – AidData. 2013





## W&M on Jeopardy!

THE FIRST  
U.S. LAW SCHOOL  
AT A COLLEGE WAS  
ESTABLISHED AT THIS  
VIRGINIA SCHOOL  
IN 1779

THE USA'S OLDEST  
MENTAL HOSPITAL  
WAS ESTABLISHED  
IN 1773, CONVENIENT  
TO THE COLLEGE OF  
WILLIAM & MARY  
IN THIS STATE

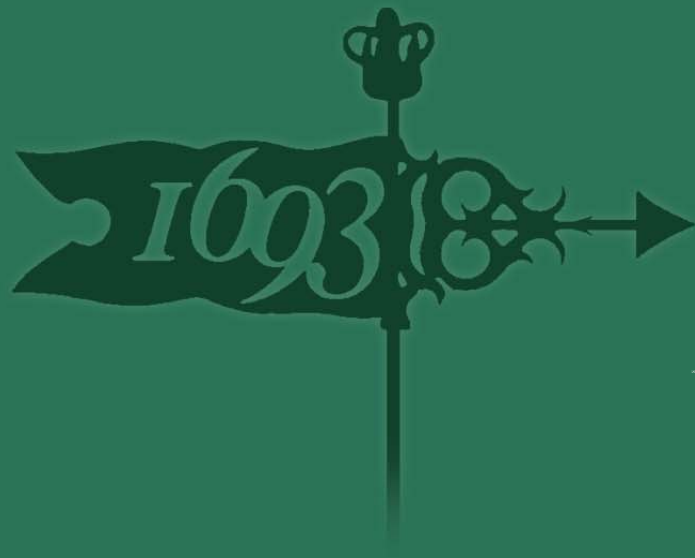
THIS VIRGINIA  
COLLEGE WAS  
FOUNDED IN 1693  
TO EDUCATE  
THE YOUTH IN PIETY,  
"GOOD LETTERS  
AND MANNERS"

IT'S KNOWN AS  
W&M FOR SHORT



IN 1693 THIS COUPLE FOUNDED  
A COLLEGE IN VIRGINIA

THE COLLEGE  
NAMED FOR  
THIS HISTORIC DUO  
IS IN WILLIAMSBURG,  
VIRGINIA



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## Additional Material

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## Rankings

<u>Rank</u>	<u>Annual Change</u> (+ = better)	<u>Category</u>	<u>Organization (Release Date)</u>
3	+3	Best Colleges: Best Undergraduate Teaching	<i>USNWR</i> (Sep '13)
4	-	"Best Value" -- Colleges and Universities	<i>Kiplinger</i> (Dec '12)
4	+2	Top 10 Best Value Public Colleges	<i>Princeton Review</i> (Jan '13)
6	-	Best Colleges: Top Public Schools	<i>USNWR</i> (Sep '13)
9	-5	America's Top Colleges: Public	<i>Forbes</i> (Aug '13)
21	+1	Best Colleges: High School Counselors	<i>USNWR</i> (Sep '13)
32	+1	Best Colleges: Top National Universities	<i>USNWR</i> (Sep '13)
44	-4	America's Top Colleges: Overall	<i>Forbes</i> (Aug '13)





## Our Vision

Our vision describes our aspiration for William & Mary as The Liberal Arts University:

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



## Our Strategy

- William & Mary will be a leading liberal arts university.
- The College will provide and be seen as providing one of the best undergraduate educations of any university in the United States, and the university will be internationally recognized for its academic excellence.
- We will do that by becoming more global, more interdisciplinary and even more focused on engaged learning experiences that bring faculty, staff and students together in exploring new horizons.
- W&M will be a welcoming community, globally engaged, connected to graduates for a lifetime, appropriately staffed and equipped for the 21<sup>st</sup> century, and in touch with all our people in ways they want to communicate.
- We will forge a solid financial foundation capable of funding our aspirations.



# Breaking Boundaries

## Leading Liberal Arts University



Welcoming



Connected  
for a Lifetime



Staffed/  
Equipped

Global



In Touch

New Financial Foundation



## Annual Planning Cycle

