

# Strategic Initiatives and New Ventures

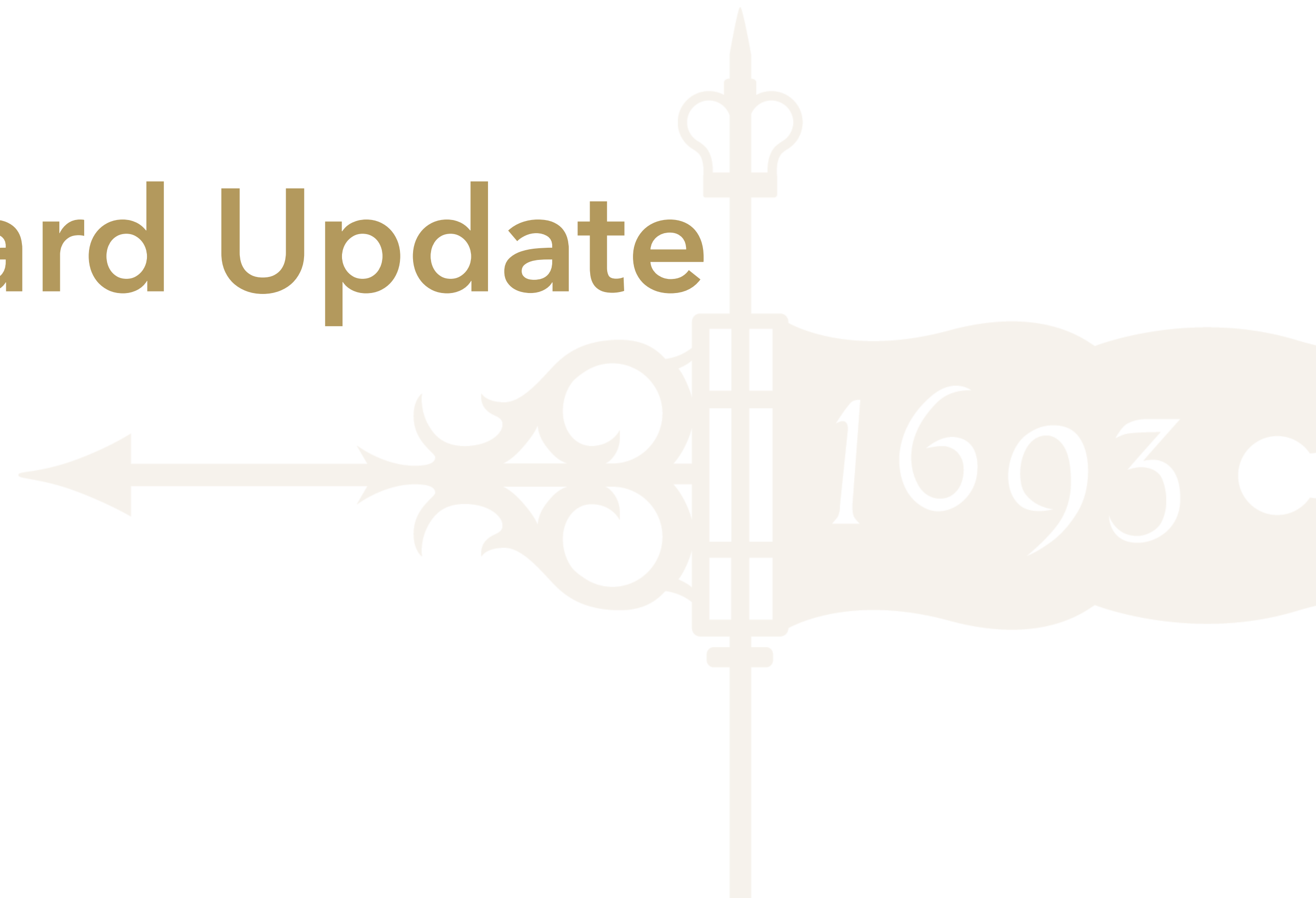
November 19, 2014








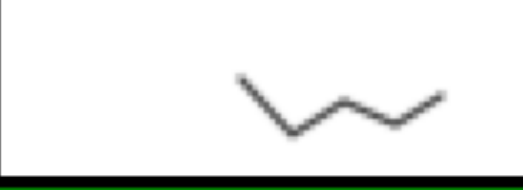


WILLIAM & MARY









CHARTERED 1693




# Dashboard Update




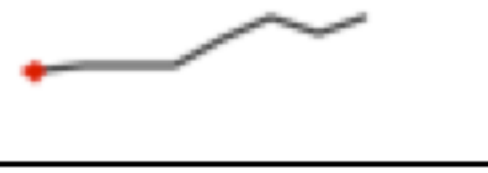
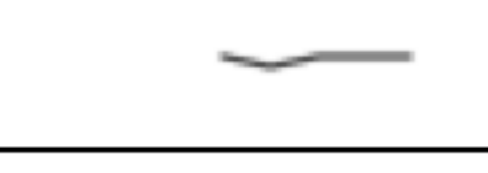


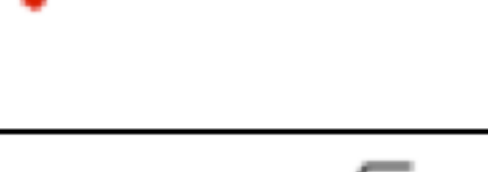

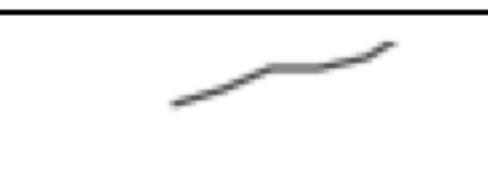



Challenge: Leading Liberal Arts University								Comparisons		
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
1	Undergraduate acceptance rate		32%	35%	32%	33%	33%	34%	30%	9%
2	Undergraduate yield rate		35%	33%	33%	32%	31%	34%	41%	58%
3	Undergraduate SAT scores: 25th – 75th percentile range		1260-1440	1240-1450	1250-1460	1270-1460	1270-1470	1250-1450	1250-1460 (2013-14)	1330-1540 (2013-14)
4	Undergraduate graduation rate ( within 6 years):		91%	90%	90%	Avail. 3/2015	Avail. 3/2016	93%	93%	95%
5	Student-faculty ratio		12:1	12:1	12:1	12:1	Avail. 4/2015	< 13:1	16:1	8:1
6	Small undergraduate classes: Percent with 2-19 students		47%	48%	49%	48%	Avail. 4/2015	50%	55%	69%
7	USNWR: Commitment to Teaching		5	8	6	3	2	1	N/A	6
8	Faculty Salaries: SCHEV peer group percentile		22%	26%	23%	27%	Avail. 10/2015	60% by 2018	31%	N/A



Challenge: Diversity								Comparisons		
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
9	Undergraduate students who are members of historically underrepresented groups		25%	26%	27%	28%	29%	N/A	28% (2013-14)	35% (2013-14)
10	Graduate/professional students who are members of historically underrepresented groups		14%	15%	16%	15%	14%	N/A	17% (2013-14)	23% (2013-14)
11	Undergraduate Pell Grant Recipients		13%	12%	12%	Avail. 3/2015	Avail. 3/2016	N/A	12%	15%
Challenge: Global Engagement								Comparisons		
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
12	Undergraduate students with international citizenship		3%	3%	4%	4%	5%	N/A	6% (2013-14)	11% (2013-14)
13	Graduate students with international citizenship		11%	12%	13%	15%	15%	N/A	14% (2013-14)	28% (2013-14)
14	Undergraduate students who study abroad		38%	46%	47%	48%	Avail. 5/2015	60% by 2018	N/A	N/A
15	Total international student enrollment		403	479	551	575	667	600 by 2016	N/A	N/A
16	Total countries with students enrolled		61	60	50	55	58	60 by 2016	N/A	N/A

Challenge: Lifelong Connection								Comparisons		
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
17	Alumni giving participation rate: undergraduates with degrees		23.9%	23.6%	23.9%	24.9%	Avail. 9/2015	40% by 2020	23% (USNWR)	31.8% (2013-14)
Challenge: Communications								Comparisons		
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
18	USNWR: National Universities		33 (tie)	33 (tie)	32 (tie)	33(tie)	Avail. 9/2015	N/A	23 (tie)	16
19	USNWR: Public Universities		6	6	6	6	Avail. 9/2015	N/A	2 (tie)	N/A



Challenge: Business Plan									Comparisons	
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
20	USNWR: Financial resources rank		97	112	114	110	Avail. 9/2015	< 70	59	24
21	Total sponsored program expenditures (millions)		\$57	\$55	\$57	Avail. 4/2015	Avail. 4/2016	\$60 by 2014	\$357 (2012-13)	\$116 (2012-13)
22	Debt Service as Percent of Operating Expense		5.9%	6.5%	6.8%	6.5%	Avail. 9/2015	< 7%	N/A	N/A
23	Annual giving to the Fund for W&M plus expendable scholarships (in millions)		\$6.3	\$6.2	\$6.4	\$6.8	Avail. 9/2015	N/A	N/A	N/A
24	Total annual giving not including big gifts (< \$100k gifts; in millions)		\$14.8	\$15.2	\$17.1	\$19	Avail. 9/2015	N/A	N/A	N/A
25	Total New Private Gift Activity (in millions). New gifts plus new commitments.		\$37	\$80	\$104	\$104	Avail. 9/2015	N/A	N/A	N/A
26	Endowment per student (year end)		\$81,408	\$82,870	\$87,963	\$99,388	Avail. 10/2015	\$175,000 by 2020	\$235,684 (2012-13)	\$315,150 (2012-13)
27	Total Endowment (in millions)		\$625	\$644	\$698	\$798	Avail. 10/2015	\$1,500 by 2020	\$5,167 (2012-13)	\$2,670 (2012-13)
28	Average per-borrower cumulative undergraduate debt		\$20,835	\$24,344	\$24,400	Avail. 2/2015	Avail. 2/2016	< \$20,000	\$21,815	\$24,382
29	Undergraduate students who graduate with debt		41%	41%	38%	Avail. 2/2015	Avail. 2/2016	<40%	35%	35%
Challenge: Administrative Resources and Infrastructure									Comparisons	
Measures		10-yr. Trend	2010-11	2011-12	2012-13	2013-14	2014-2015	Target	UVA	Brown
30	All E&G Facilities Condition Index		7.8%	6.3%	6.9%	5.7%	Avail. 2/2015	< 10%	6.6% (2012-13)	N/A

# Visual Identity & Licensing

Justin Schoonmaker & Andrea Sardone

*BOV Update, November 19, 2014*



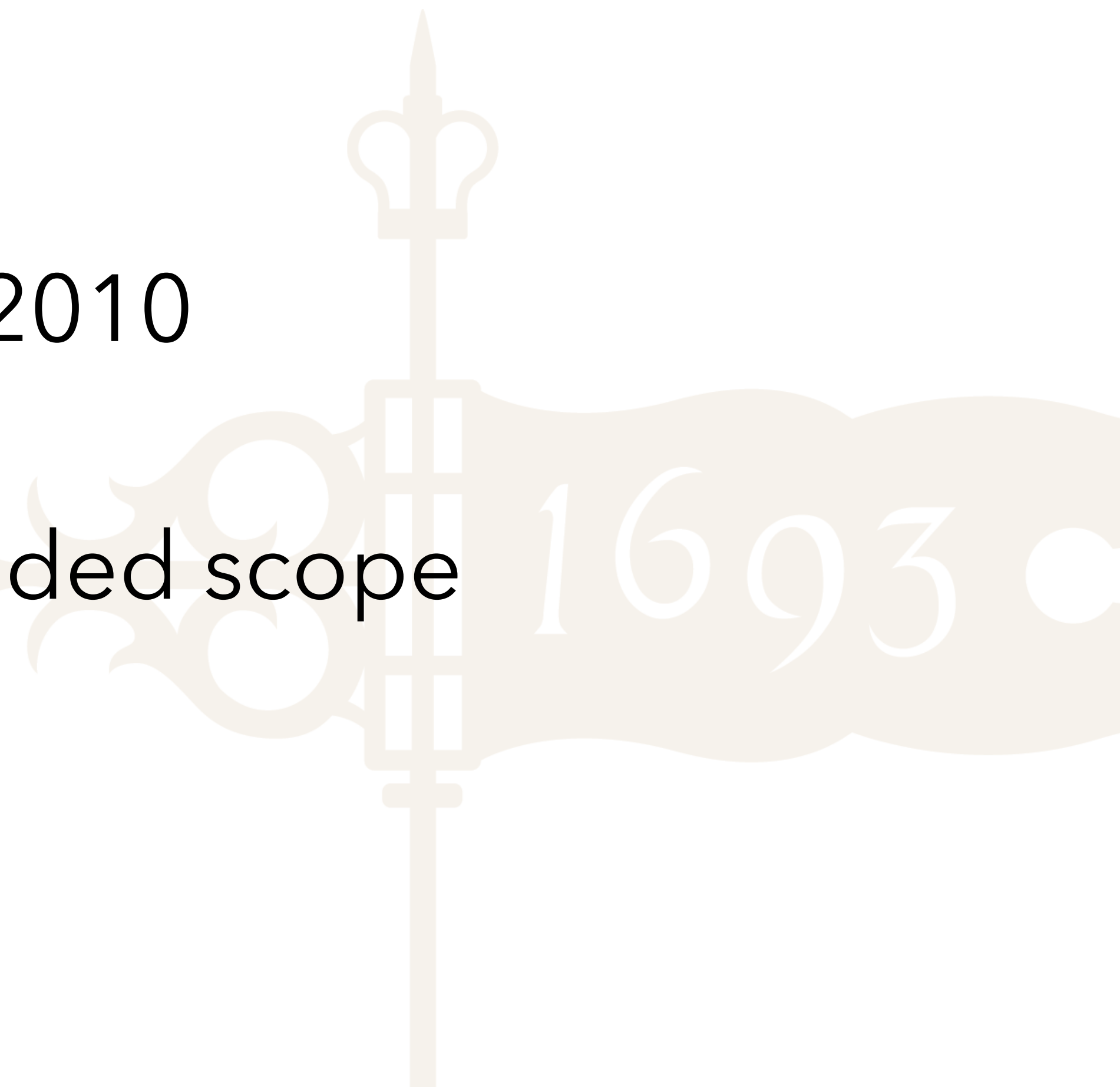
WILLIAM & MARY

CHARTERED 1693

# Overview

Presidential charge in 2010

Project research led to expanded scope





# Process

Visual Identity Committee

Design Subcommittee

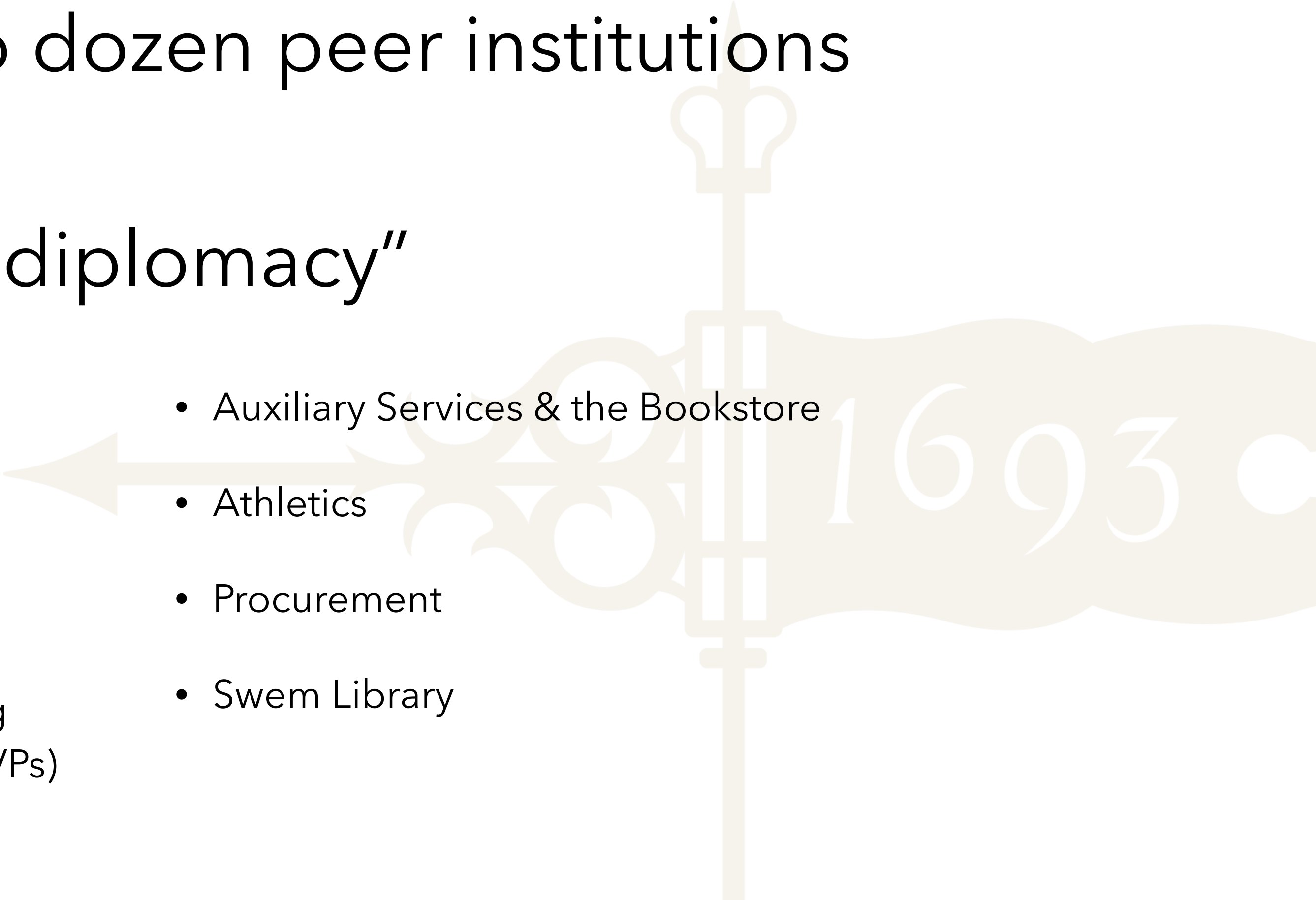
Joined Advancement's branding research to get  
5,800 constituent opinions on visuals



# Process

Researched over two dozen peer institutions

“Shuttle diplomacy”

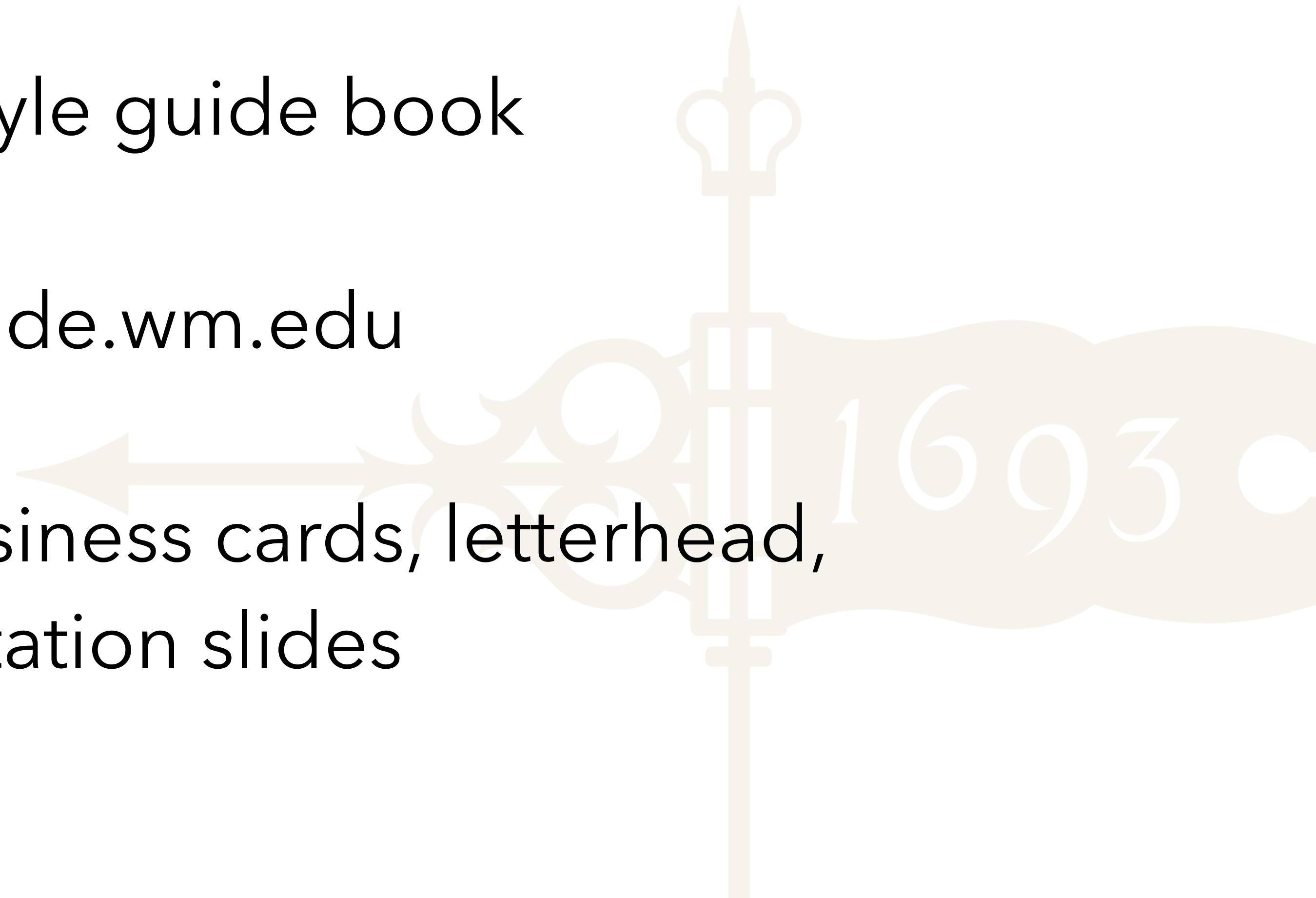
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- All graduate schools
  - Student Leadership Development, Student Assembly, Flat Hat
  - College-wide Communications Committee, Communications Steering Group, President’s Cabinet (Deans & VPs)
  - Auxiliary Services & the Bookstore
  - Athletics
  - Procurement
  - Swem Library

# Deliverables

50-page style guide book

[styleguide.wm.edu](http://styleguide.wm.edu)

New templates: business cards, letterhead,  
presentation slides





# Style Guide Highlights





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### William & Mary Green



PANTONE 343  
R 3 G 86 B 66  
C 95 M 15 Y 62 K 58  
#035642

### William & Mary Gold



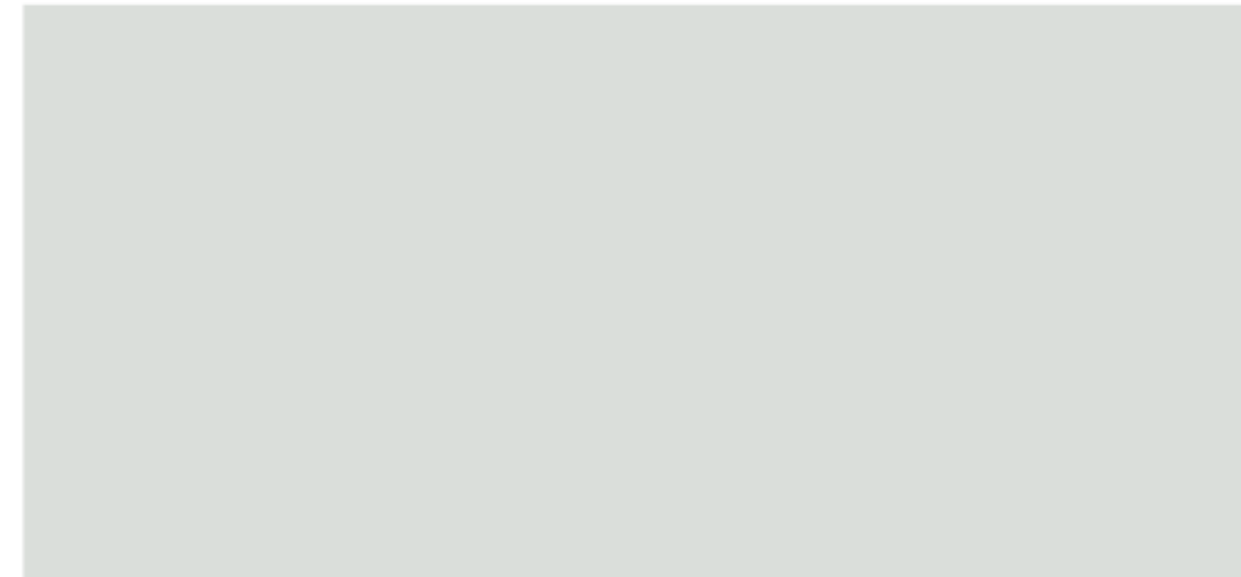
PANTONE 465  
METALLIC: PANTONE 872  
R 179 G 153 B 93  
C 7 M 27 Y 55 K 22  
#B3995D

### Spirit Gold



PANTONE 7409  
R 238 G 175 B 0  
C 0 M 33 Y 98 K 0  
#EEAF00

### William & Mary Silver

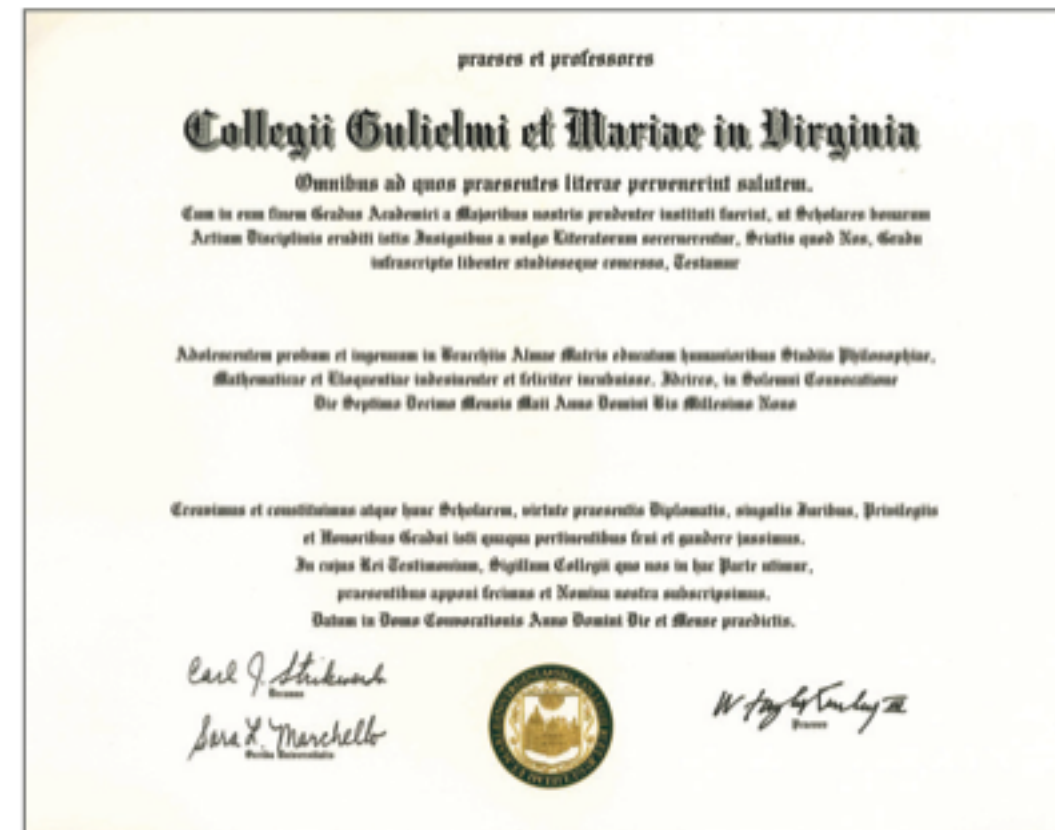


PANTONE 427  
METALLIC: PANTONE 877  
R 209 G 212 B 211  
C 7 M 3 Y 4 K 8  
#D1D4D3





Memorial plaque



Diploma with College Seal



College mace

Tribe





WILLIAM & MARY

CHARTERED 1693



WILLIAM & MARY

LAW SCHOOL



William & Mary  
School of Education



Raymond A. Mason  
School of Business

WILLIAM & MARY



William & Mary  
Arts & Sciences



William & Mary  
Graduate Arts & Sciences



WILLIAM & MARY

SCHROEDER CENTER FOR HEALTH POLICY

Thomas Jefferson Program in Public Policy



WILLIAM & MARY

INSTITUTE FOR THE THEORY & PRACTICE OF  
INTERNATIONAL RELATIONS

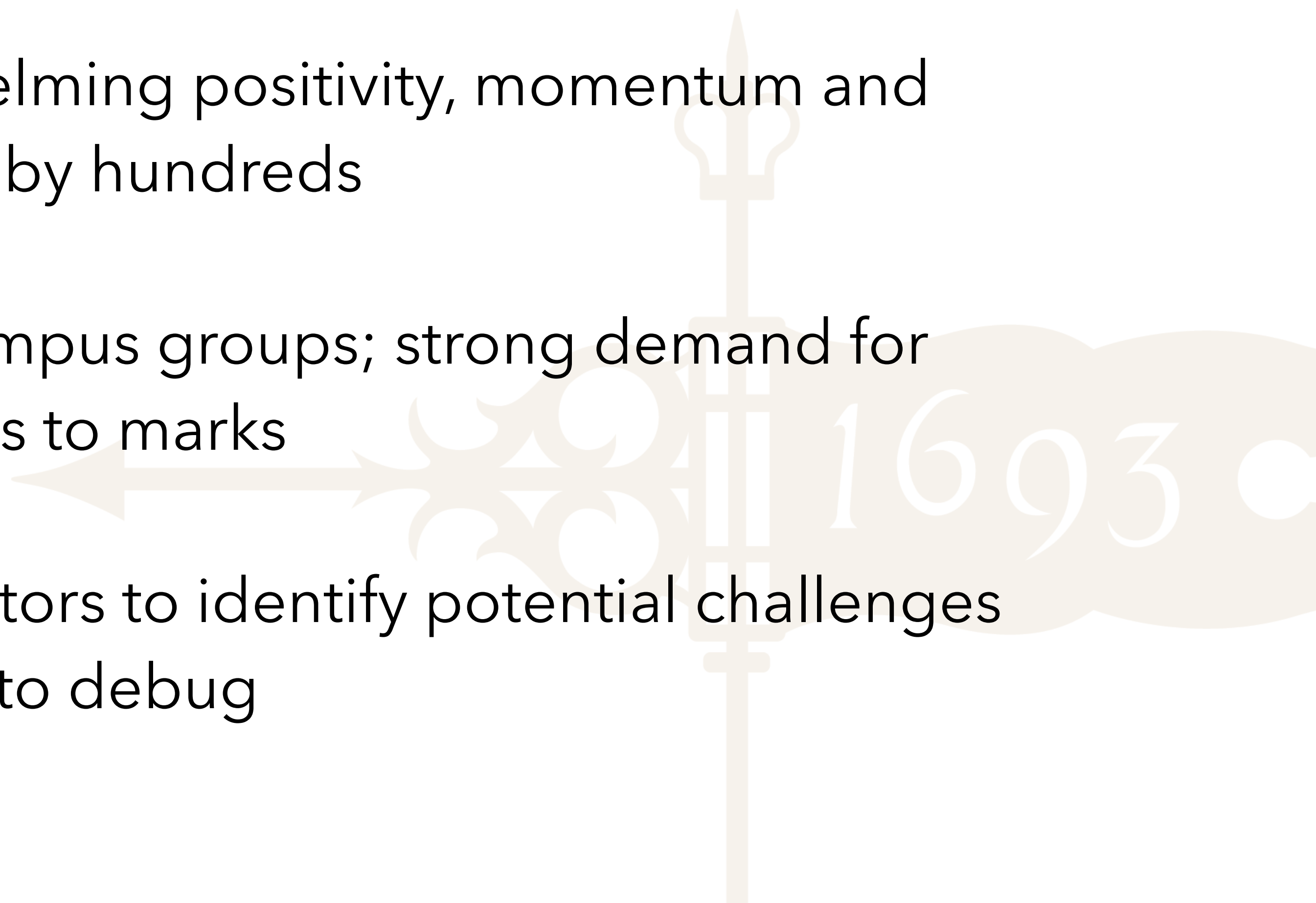


# Reaction thus far

Guide greeted with overwhelming positivity, momentum and support by hundreds

Engagement initiated by campus groups; strong demand for access to marks

Collaboration with communicators to identify potential challenges and to debug



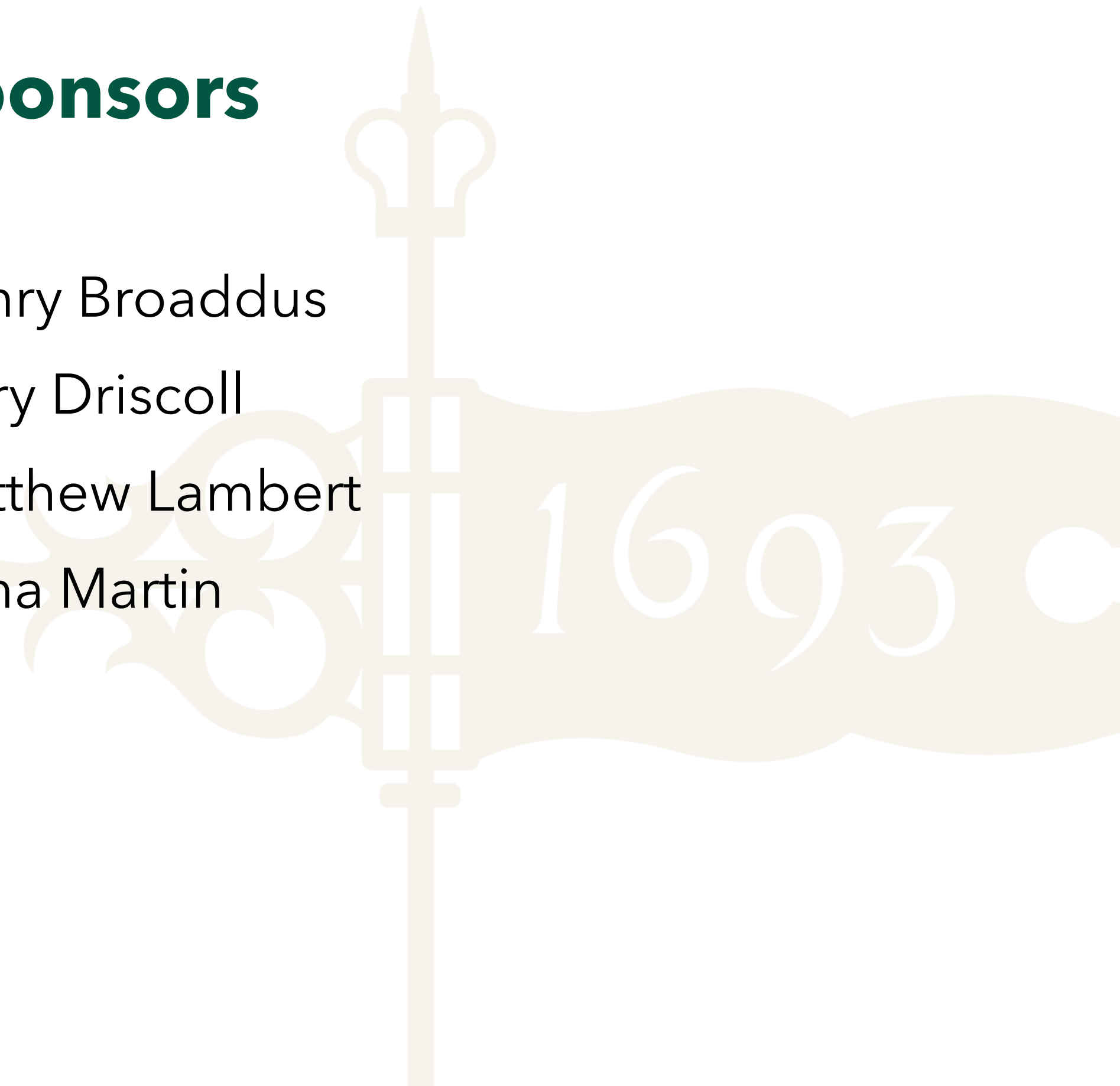
# Licensing Project Working Group

## Representation

Alumni Association, Advancement  
Auxiliary Services  
Creative Services  
Economic Development  
Graduate School  
Marketing, Advancement

## Sponsors

Henry Broaddus  
Terry Driscoll  
Matthew Lambert  
Anna Martin



# Need

Comprehensive branded merchandise plan to showcase the W&M brand, raise visibility and generate revenue



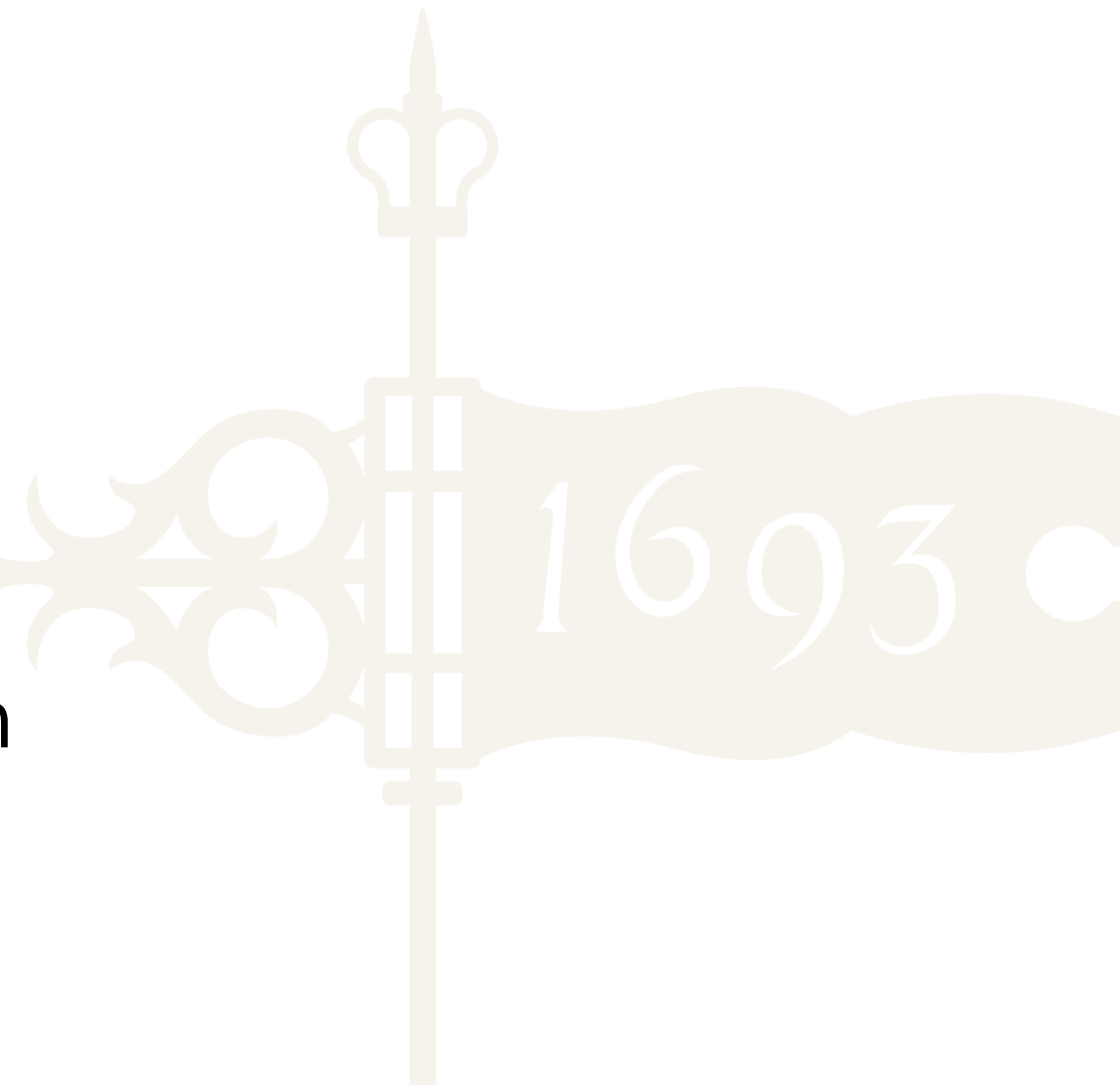


# Goals

Visibility

Revenue

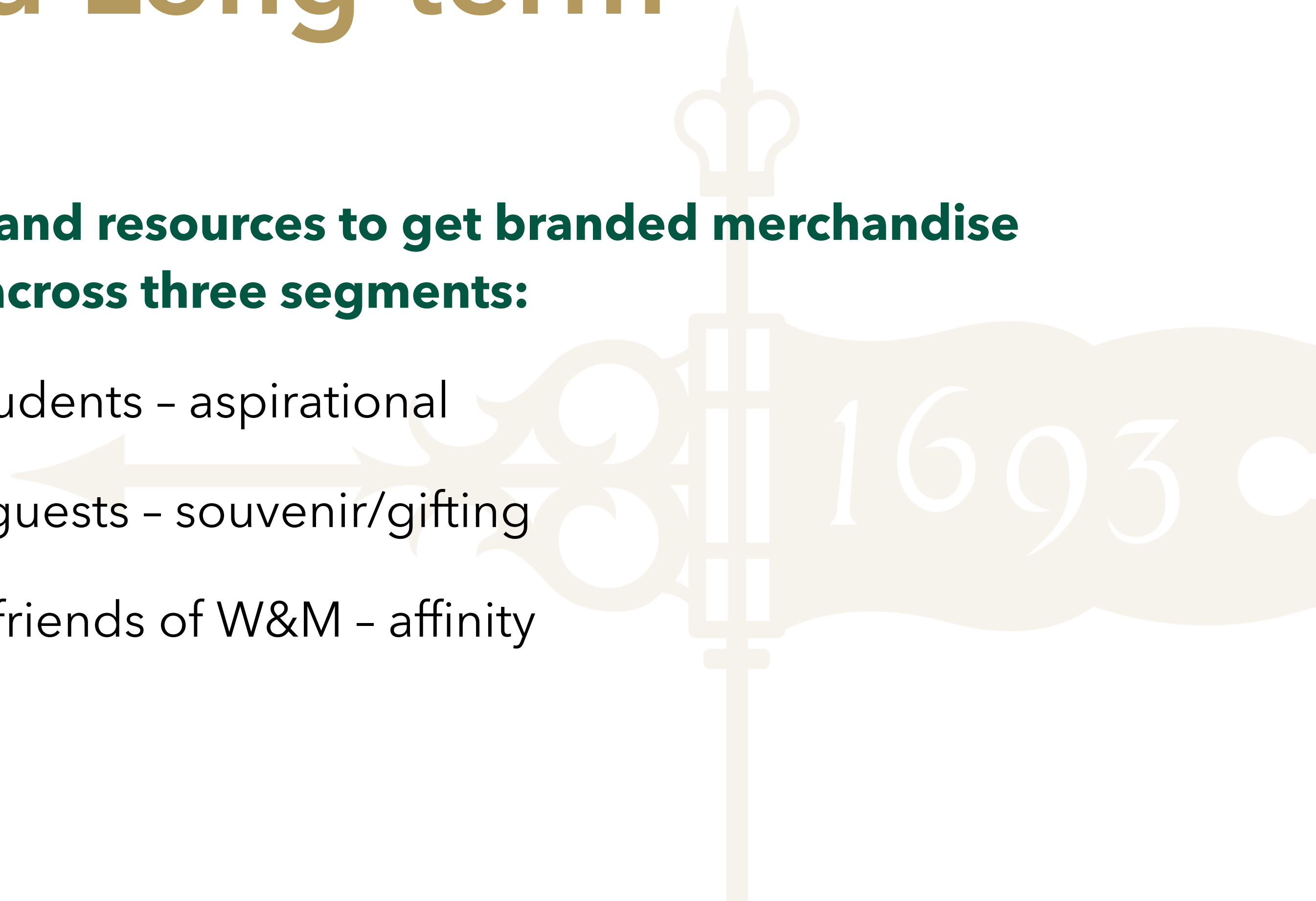
Efficient Operation



# Parallel Strategies: Short- and Long-term

**Leverage opportunities, agreements and resources to get branded merchandise into the market across three segments:**

- Prospective students – aspirational
- Tourists, campus guests – souvenir/gifting
- Students, alumni, friends of W&M – affinity



# Leverage high traffic events

Convocation

Home Sports Games

Homecoming

Admitted Student Day

Yule Log

Parents' Weekend

Charter Day

Move-in days

Commencement

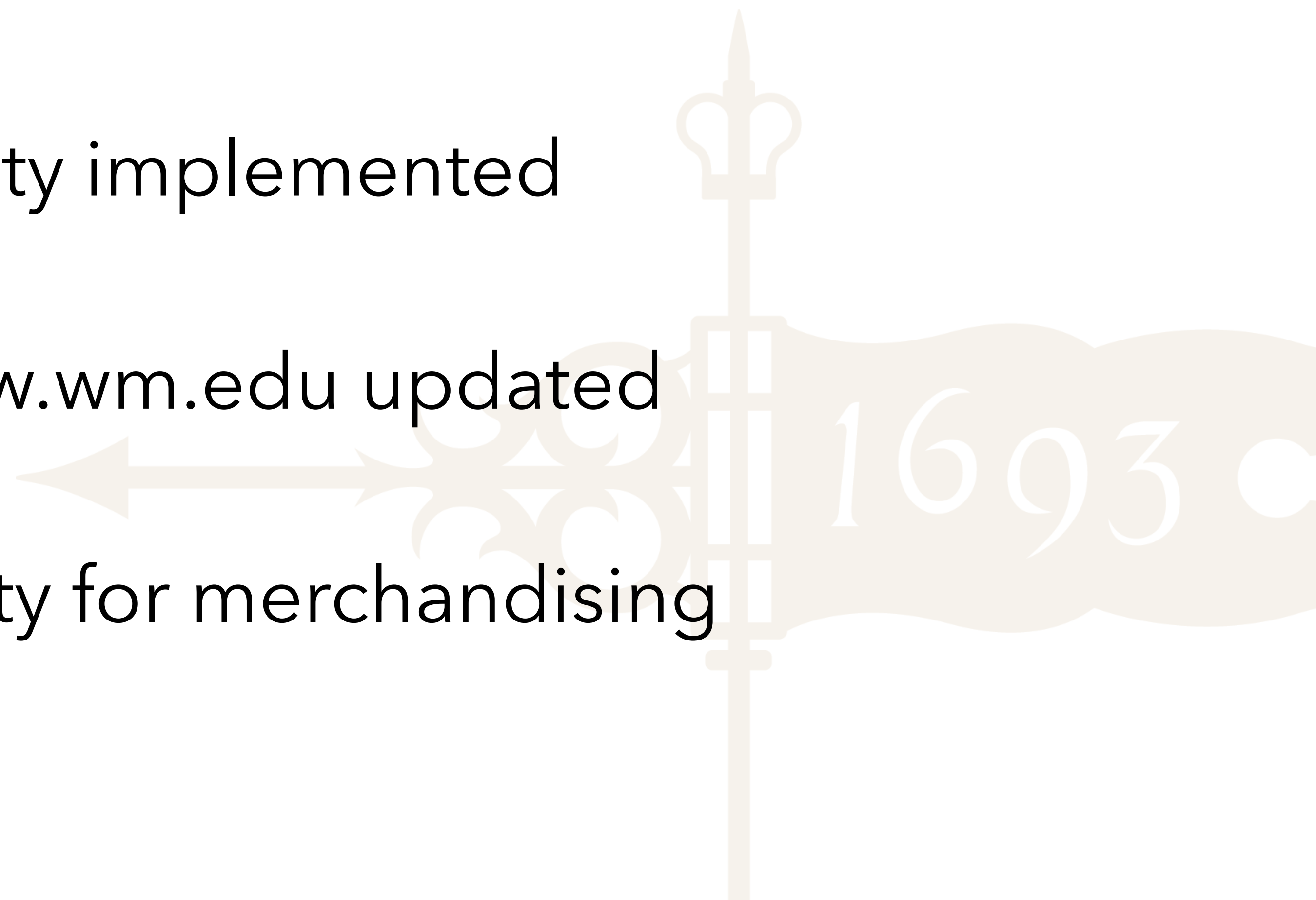


# 2015 Charter Day

Visual identity implemented

Design for [www.wm.edu](http://www.wm.edu) updated

Great opportunity for merchandising





# 2015 Charter Day Plan

Multiple on-campus sales points

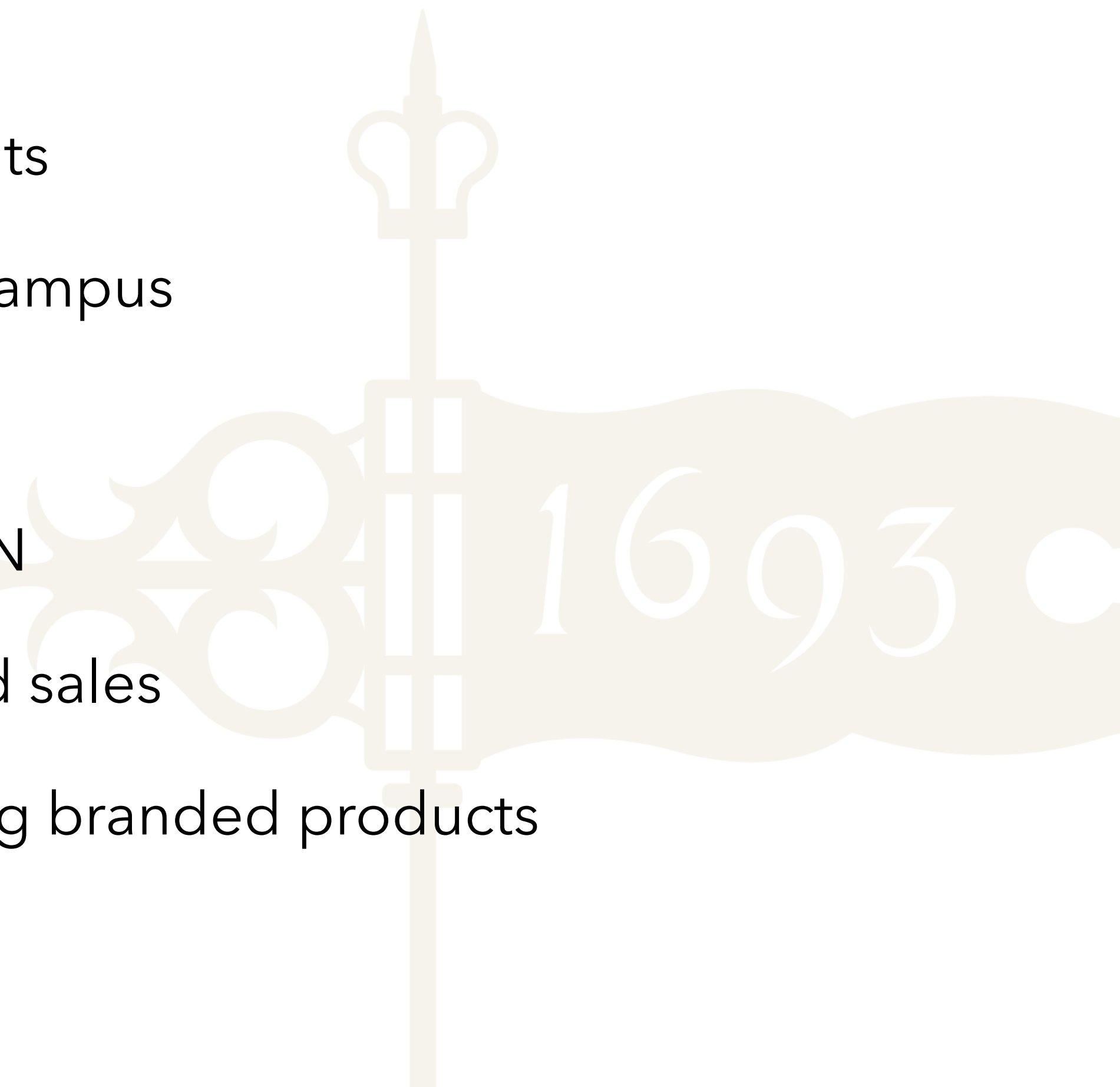
Leverage existing sales points on campus

Expanded display at B&N

Online sales managed by B&N

Marketing will drive awareness and sales

Significant alumni engagement opportunity using branded products



# Comprehensive Plan

Explore existing contractual relationships for on campus and online sales;  
merchandise selections, etc.

Explore options with licensing and trademark management vendors to manage  
retailers in every channel of distribution

Collect needs/requirements from key areas – develop business plans

Develop RFP for turn-key or semi turn-key operations

# Summary

Get the product into the market!

Kick off by leveraging opportunistic events

*and*

work toward a comprehensive solution