

Strategic Initiatives & New Ventures

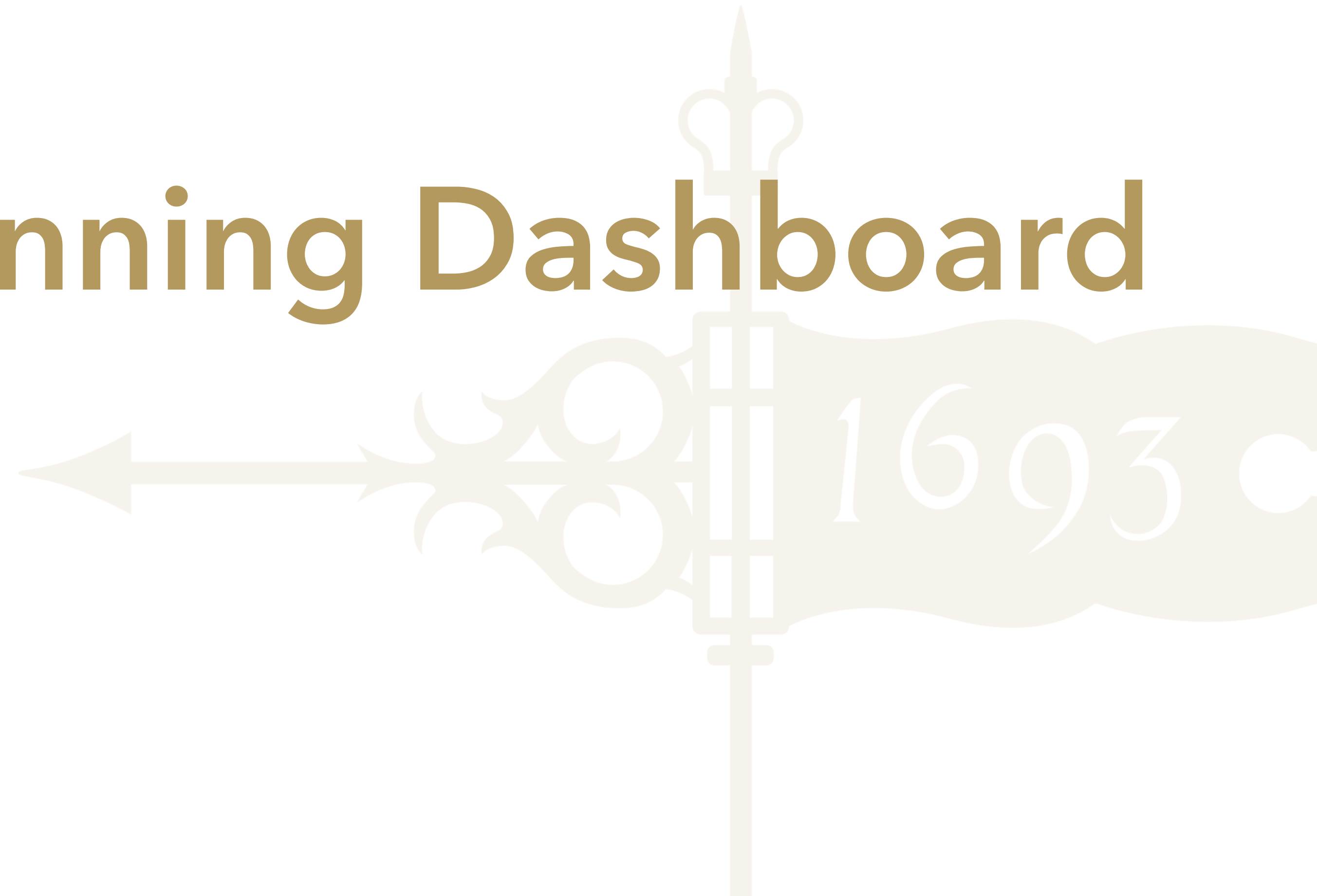
November 18, 2016



WILLIAM & MARY

CHARTERED 1693


Strategic Planning Dashboard



STRATEGIC PLANNING DASHBOARD

= NEW DATA












= UNAVAILABLE DATA

CHALLENGE							COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	Prior Year	2016-17	TARGET	UVA	BROWN
#	Measure of progress toward aspirational goal		4	5	Available 4/2017	5	4	4

STRATEGIC PLANNING DASHBOARD

= NEW DATA









= UNAVAILABLE DATA

CHALLENGE : Leading Liberal Arts University									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
1	Undergraduate acceptance rate		33.7%	33.2%	33.0%	34.5%	36.5%	34%	30% (2015-16)	9% (2015-16)
2	Undergraduate yield rate		36.8%	31.7%	31.4%	29.5%	28.7%	34%	40% (2015-16)	56% (2015-16)
3	Undergraduate SAT scores: 25th - 75th percentile range		1250-1450	1270-1460	1270-1470	1260-1460	1250-1470	1250-1450	1250-1460 (2015-16)	1370-1560 (2015-16)
4	Undergraduate graduation rate: completions within 6 years		91%	90%	90%	Available 4/2017	Available 4/2018	95%	93% (2009 cohort)	96% (2009 cohort)
5	Student-faculty ratio		11:1	12:1	12:1	12:1	Available 4/2017	12:1	15:1 (2015-16)	7:1 (2015-16)
6	Small undergraduate classes: percent with 2-19 students		49%	48%	48%	49%	Available 4/2017	50%	56% (2015-16)	70% (2015-16)
7	USNWR: Best Undergraduate Teaching		N/A	2	4	12	Available 9/2017	1	N/A	4 (2015-16)
8	Gap between avg. faculty salary and 60th percentile of SCHEV peers		N/A	20.1%	15.7%	Available 4/2017	Available 4/2018	60th pctl.	N/A	N/A
CHALLENGE : Diversity									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
9	Undergraduate students who are members of historically underrepresented groups		20%	28%	29%	29%	29%	N/A	29% (2015-16)	37% (2015-16)
10	Graduate/professional students who are members of historically underrepresented groups		13%	15%	14%	16%	18%	N/A	18% (2015-16)	23% (2015-16)
11	Undergraduate Pell grant recipients		9%	12%	11%	Available 3/2017	Available 3/2018	N/A	13% (2014-15)	16% (2014-15)

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= UNAVAILABLE DATA

CHALLENGE : Global Engagement									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
12	Undergraduate students with international citizenship		2%	4%	5%	6%	6%	N/A	5% (2015-16)	13% (2015-16)
13	Graduate students with international citizenship		8%	15%	15%	14%	14%	N/A	16% (2015-16)	30% (2015-16)
14	Undergraduate students who study abroad		N/A	48%	50%	51%	Available 9/2017	60%	N/A	N/A
15	Total international student enrollment		N/A	575	667	687	691	600	N/A	N/A
16	Total countries with students enrolled		N/A	55	58	65	61	60	N/A	N/A
CHALLENGE : Lifelong Connection									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
17	Alumni giving participation rate: undergraduates with degrees		21.9%	24.9%	27.1%	28.6%	Available 9/2017	40%	N/A	28% (2015-16)
CHALLENGE : Communications									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
18	USNWR: National Universities		32	33 (tie)	34 (tie)	32 (tie)	Available 9/2017	N/A	24 (tie) (2015-16)	14 (2015-16)
19	USNWR: Public Universities		6	6	6	6	Available 9/2017	N/A	2 (tie) (2015-16)	N/A

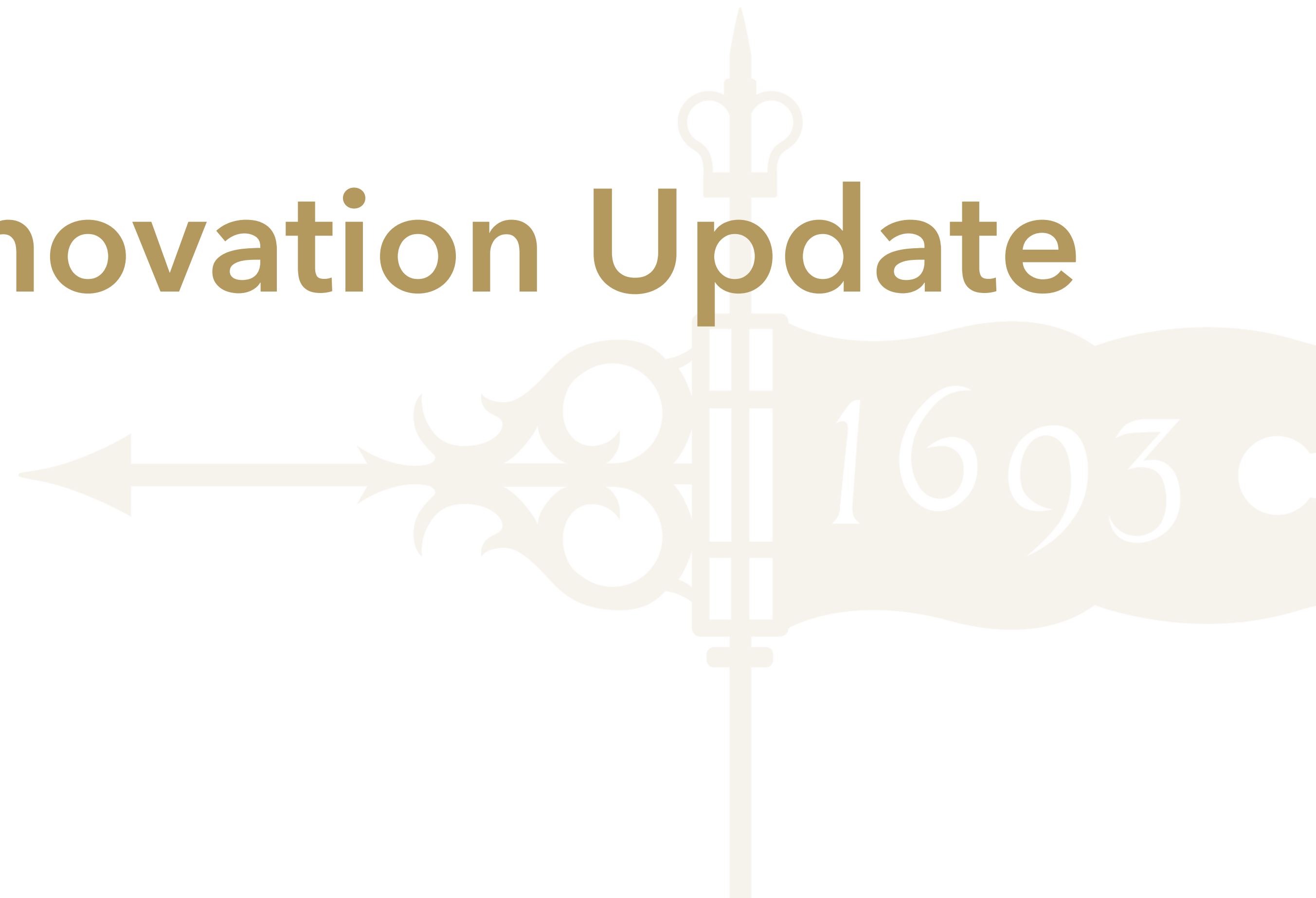
STRATEGIC PLANNING DASHBOARD

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CHALLENGE : Business Plan									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
20	USNWR: Financial Resources		111	110	113	112	Available 9/2017	70	55 (2015-16)	22 (2015-16)
21	Total sponsored program expenditures (in millions)		\$50	\$59	\$61	Available 4/2017	Available 4/2018	\$60	\$329 (2014-15)	\$110 (2014-15)
22	Debt service as percent of operating expense		N/A	5.7%	5.6%	5.9%	Available 9/2017	7%	N/A	N/A
23	Annual giving to the Fund for W&M plus expendable scholarships (in millions)		\$5.6	\$6.8	\$8.6	\$8.2	Available 9/2017	\$9	N/A	N/A
24	Total annual giving not including gifts >\$100K (in millions)		\$13.6	\$19.0	\$20.6	\$21.3	Available 9/2017	\$22	N/A	N/A
25	Total new private gifts and commitments (in millions)		\$39	\$104	\$106	\$143	Available 9/2017	\$100	N/A	N/A
26	Endowment per student (year end)		N/A	\$99,388	\$100,572	\$99,381	Available 10/2017	\$175,000	\$277,100 (2014-15)	\$349,520 (2014-15)
27	Total endowment (in millions)		\$586	\$798	\$811	\$804	Available 10/2017	\$1,500	\$6,181 (2014-15)	\$3,073 (2014-15)
28	Average per-borrower cumulative undergraduate debt		\$16,765	\$25,733	\$26,017	Available 2/2017	Available 2/2018	\$20,000	\$24,905 (2015 grads)	\$22,197 (2015 grads)
29	Undergraduate students who graduate with debt		39%	38%	37%	Available 2/2017	Available 2/2018	40%	35% (2015 grads)	34% (2015 grads)
CHALLENGE : Administrative Resources and Infrastructure									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2007-08)	2013-14	2014-15	2015-16	2016-17	TARGET	UVA	BROWN
30	All E&G Facilities Condition Index		12.4%	5.7%	5.8%	4.8%	Available 2/2017	10%	5% (2014-15)	N/A

Business Innovation Update



Business Innovation at William & Mary



Culture of Innovation



Continual Process
Improvement



Capital Expenditure
Savings



Recurring Baseline
Dollars

Completed

Ongoing

Savings

- IT Centralization

- Procurement
- Org Design
- HR Delivery Model
- Managed Print
- IT Cloud Migration

- Energy Use Policy
- Green Revolving Fund

Revenue

- Banking Services

- Small Purchase Card
- Licensed Merchandise
- Conferences & Events

Facilitation

- Org Design Pilot
- Procurement Cooperative Formation
- CRM Vendor Selection

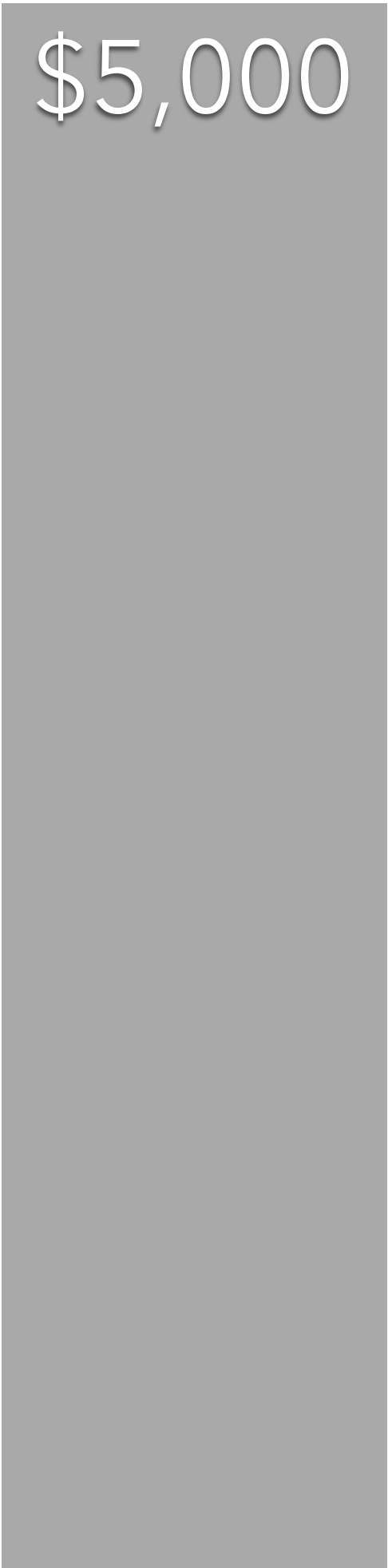
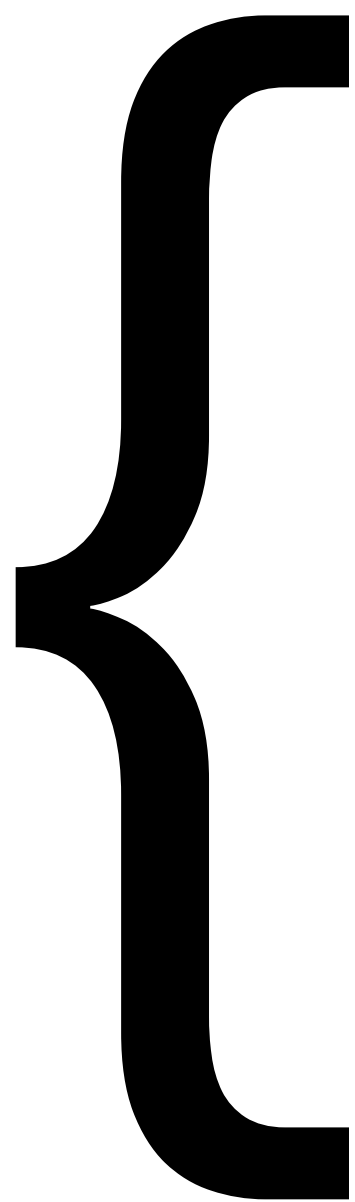
- CRM Implementation

Business Innovation Savings and Revenues

- Revenues
- Savings
- Recurring Savings & Revenues

(value in thousands of dollars)

**Annual
Baseline
Recurring**

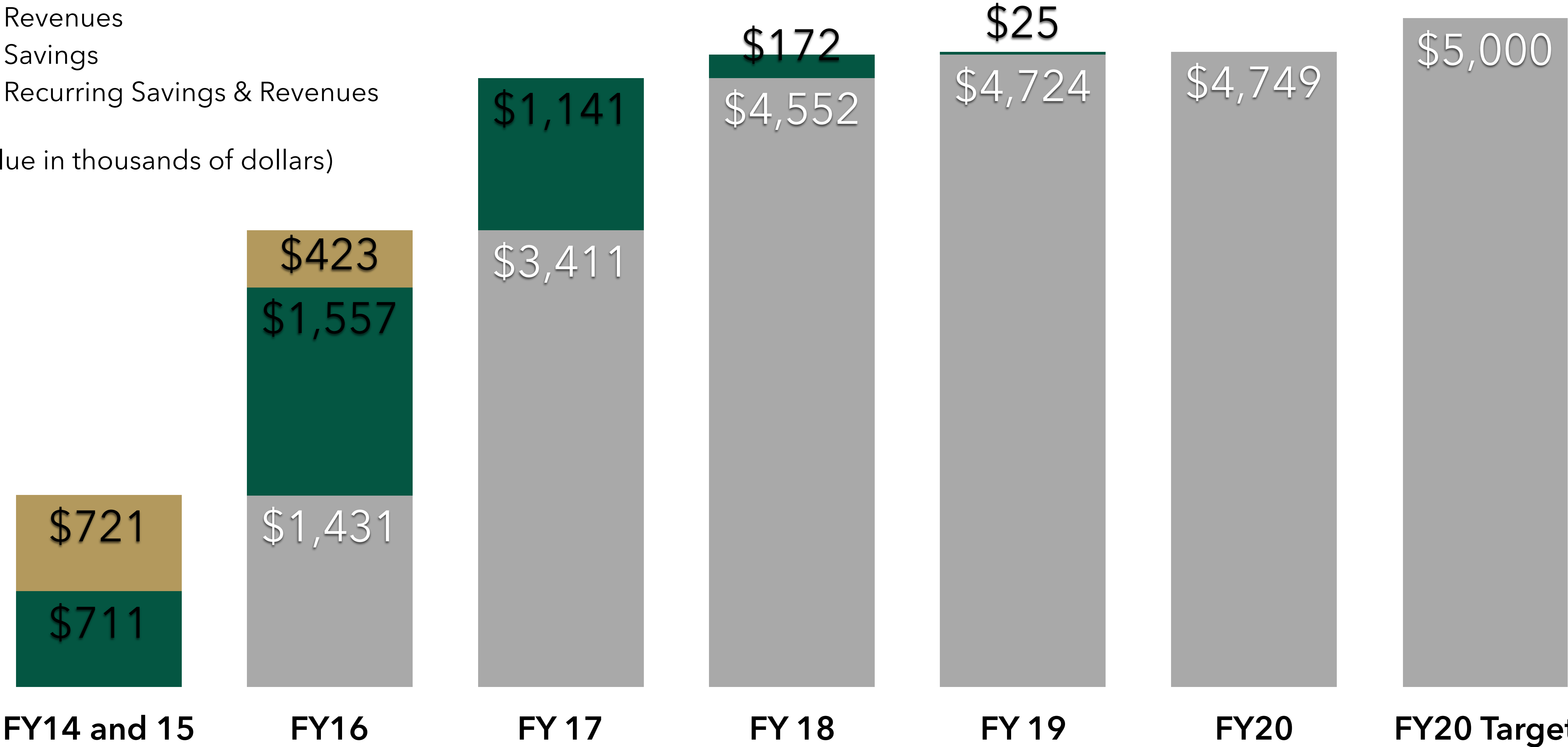


FY20 Target

Business Innovation Savings and Revenues

- Revenues
- Savings
- Recurring Savings & Revenues

(value in thousands of dollars)





Sign Out

Thermostats

LOWER LEVEL

71°

42%

Humidity

System: Auto
Following Schedule

UPPER LEVEL

70°

45%

Humidity

System: Auto
Following Schedule