

# Ad Hoc Committee on Organizational Sustainability & Innovation

April 25, 2019



WILLIAM & MARY

CHARTERED 1693



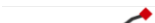








# Strategic Planning Dashboard



# STRATEGIC PLANNING DASHBOARD

= NEW DATA









= FUTURE DATA

CHALLENGE : Leading Liberal Arts University									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
1	Undergraduate acceptance rate		34.0%	34.5%	36.5%	35.9%	36.9%	34%	27% (2017-18)	9% (2017-18)
2	Undergraduate yield rate		34.0%	29.5%	28.7%	28.6%	28.6%	34%	38% (2017-18)	59% (2017-18)
3	Undergraduate SAT scores: 25th – 75th percentile range		1250-1440	1260-1460	1250-1470	1300-1480*	1310-1490*	1250-1450	1290-1470 (2017-18)	1405-1570 (2017-18)
4	Undergraduate graduation rate: completions within 6 years		90%	91%	92%	91%	Available 4/2020	95%	95% (2011 cohort)	95% (2011 cohort)
5	Student-faculty ratio		12:1	12:1	12:1	11:1	12:1	12:1	15:1 (2017-18)	7:1 (2017-18)
6	Small undergraduate classes: percent with 2-19 students		48%	49%	49%	49%	47%	50%	54% (2017-18)	70% (2017-18)
7	USNWR: Best Undergraduate Teaching		5	12	7	5	Available 9/2019	1	24 (tie) (2017-18)	6 (2017-18)
8	Gap between avg. faculty salary and 60th percentile of SCHEV peers		18%	17.7%	21.3%	22.2%	Available 4/2020	60th pctl.	N/A	N/A
CHALLENGE : Diversity									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
9	Undergraduate students who are members of historically underrepresented groups		23%	29%	29%	29%	29%	N/A	31% (2017-18)	39% (2017-18)
10	Graduate/professional students who are members of historically underrepresented groups		13%	16%	18%	20%	20%	N/A	19% (2017-18)	24% (2017-18)
11	Undergraduate Pell grant recipients		11%	11%	11%	12%	Available 3/2020	N/A	12% (2016-17)	14% (2016-17)

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CHALLENGE : Global Engagement									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
12	Undergraduate students with international citizenship		3%	6%	6%	6%	6%	N/A	4% (2017-18)	12% (2017-18)
13	Graduate students with international citizenship		12%	14%	14%	13%	14%	N/A	20% (2017-18)	30% (2017-18)
14	Undergraduate students who study abroad		44%	51%	56%*	59%*	Available 9/2019	60%	N/A	N/A
15	Total international student enrollment		N/A	687	694	702	715	600	N/A	N/A
16	Total countries with students enrolled		N/A	65	61	61	69	60	N/A	N/A
CHALLENGE : Lifelong Connection									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
17	Alumni giving participation rate: undergraduates with degrees		23.4%	28.6%	29.9%	28.7%	Available 9/2019	40%	20.3% (2017-18)	31.6% (2017-18)
CHALLENGE : Communications									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
18	USNWR: National Universities		31	32 (tie)	32 (tie)	38 (tie)	Available 9/2019	N/A	25 (tie) (2017-18)	14 (tie) (2017-18)
19	USNWR: Public Universities		6	6	6	10 (tie)	Available 9/2019	N/A	3 (2017-18)	N/A

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CHALLENGE : Business Plan									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
20	USNWR: Financial Resources		85	112	111	109	Available 9/2019	70	50 (2017-18)	24 (2017-18)
21	Total sponsored program expenditures (in millions)		\$54	\$63	\$62	\$65	Available 4/2020	\$60	\$361 (2015-16)	\$116 (2015-16)
22	Debt service as percent of operating expense		6.7%	7.2%	5.3%*	5.4%	Available 9/2019	7%	N/A	N/A
23	Annual giving to the Fund for W&M plus expendable scholarships (in millions)		\$6.2	\$8.2	\$7.3	\$6.8	Available 9/2019	\$9	N/A	N/A
24	Total annual giving not including gifts >\$100K (in millions)		\$14.7	\$21.3	\$21.2	\$21.0	Available 9/2019	\$22	N/A	N/A
25	Total new private gifts and commitments (in millions)		\$45	\$143	\$135	\$88	Available 9/2019	\$100	N/A	N/A
26	Endowment per student (year end)		\$71,406	\$99,381	\$106,143	\$113,012	Available 10/2019	\$175,000	\$262,079 (2015-16)	\$333,103 (2015-16)
27	Total endowment (in millions)		\$540	\$804	\$874	\$936	Available 10/2019	\$1,500	\$5,852 (2015-16)	\$2,963 (2015-16)
28	Average per-borrower cumulative undergraduate debt		\$21,367	\$26,400	\$24,072	\$25,409	Available 2/2020	\$20,000	\$24,598 (2016 grads)	\$23,810 (2016 grads)
29	Undergraduate students who graduate with debt		38%	35%	36%	35%	Available 2/2020	40%	33% (2016 grads)	37% (2016 grads)
CHALLENGE : Administrative Resources and Infrastructure									COMPARISONS	
	MEASURES	10-yr Trend (up=positive)	10 Yrs Ago (2009-10)	2015-16	2016-17	2017-18	2018-19	TARGET	UVA	BROWN
30	All E&G Facilities Condition Index		7.6%	4.8%	4.6%	10%*	13%	10%	5.1% (2016-17)	N/A

# Tiger Team Update: Summer Semester



# Charge

- Develop a robust, feasible undergraduate summer term proposal
- Characterize its benefits and challenges
- Test and evaluate operationally and financially

# Key Findings

- Need to assess the attractiveness to prospective students
- Incentives more desirable than requirements
- Many opportunities (non-summer internships, curricular flexibility, unique academic and co-curricular experiences, etc.)



# Next Steps

- Evaluate the attractiveness to prospective students via the positioning study
- Establish a steering committee to continue this work and to align it with strategic planning
- Develop a pilot that expands summer offerings and opportunities over a two- to three-year period

# Tiger Team Update: Continuing Education



# Charge

- Explore potential models of continuing education
- Identify the most viable option(s)
- Characterize benefits and challenges
- Evaluate feasibility

# Key Findings

- Requirements for success
  - Advance the mission and extend the brand
  - Enable innovation (more nimble, less constrained)
  - Generate meaningful revenues
- Changes in location and modality do not cannibalize existing programs

# Next Steps

- Engage consultant
  - Where is the best market?
  - What is the right modality?
  - What program is the best fit?
- Propose operating model based on findings

# Questions?

