

# OPEN SESSION PRE-READ / AD HOC ORGANIZATIONAL SUSTAINABILITY & INNOVATION



## 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



DASHBOARD NOTES

The dashboard contains selected measures keyed to challenge areas within the strategic plan. W&M tracks many of these measures against a set of 16 peer universities identified in the strategic planning process. This dashboard contains publicly available data for two of those schools for illustrative purposes. Comparisons with other schools are challenging to say the least, and require careful analysis. UVA and Brown, for example, both have engineering and medical schools and W&M does not.

Source Notes by Dashboard Measure Number	
1	Integrated Postsecondary Education Data System (IPEDS) of US Dept. of Education Nat’l Center for Education Statistics (data for required reports could vary among schools by one year for some measures)
2	IPEDS. See note 1.
3	US News & World Report (USNWR): rankings published in September based on data submitted in previous spring. Reported for year data collected. Calculated by adding the 25th and 75th percentiles for Critical Reading and the percentiles for Math. *For 2017-18 and 2018-2019 data, we use NEW SAT scores. If a student only submits OLD scores, we convert the OLD to NEW based on College Board's concordance tables. If a student submits both OLD and NEW, we convert OLD to NEW (Old Critical Reading & Writing to New Evidence-Based Reading and Writing, and Old Math to New Math). Then we use whichever total is higher, the converted old scores or the new scores. W&M does superscore within the same SAT test but not across the OLD and NEW SAT. For example, we will not combine the highest converted old CRW with the new SAT M.
4	IPEDS. See note 1.
5	USNWR. See note 3. Does not include faculty or students in stand-alone graduate or professional programs (e.g., Law)
6	Common Data Set (or institutional website as available).
7	USNWR. See note 3.
8	IPEDS HR data reporting.
9	IPEDS. See note 1. Underrepresented groups include American Indian or Alaska Native, Asian, Native Hawaiian/ Other Pacific Islander, Black or African American, Hispanic, Two or more races. Underrepresented groups do not include White, Unknown, Nonresident aliens.
10	IPEDS. See note 1. Underrepresented groups include American Indian or Alaska Native, Asian, Native Hawaiian/ Other Pacific Islander, Black or African American, Hispanic, Two or more races. Underrepresented groups do not include White, Unknown, Nonresident aliens.
11	IPEDS. See note 1. Calculated by dividing the number of Pell Grant recipients by the total number of undergraduates--financial aid cohort. Data unavailable prior to 2008-09, so percent receiving federal aid used as a proxy.
12	IPEDS. See note 1. This measure reflects the IPEDS variable "nonresident alien," which is defined as "a person who is not a citizen or national of the United States and who is in this country on a visa or temporary basis and does not have the right to remain indefinitely."
13	IPEDS. See note 12.
14	Institute of International Education, "Open Doors Data" reports. Since 2012-13, W&M has been using an internal calculation that includes both IIE's Open Doors number and adds international students who study abroad. *The percentage of 2016-2017 was updated and final, and that of 2017-2018 was estimated.
15	W&M records.
16	W&M records. Total number of countries represented by W&M students.

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Source Notes by Dashboard Measure Number	
17	Council for Aid to Education/Voluntary Support of Education. Money received and irrevocable commitments only. Does not include all pledges. Annual rate based on Council for Aid to Education/Voluntary Support of Education (VSE). Uva data is not available from CAE VSE report. UVa data is from USNWR which reflects the average percentage of living alumni with bachelor's degrees who gave to their school during the previous two most recent years, e.g., USNWR 2016 release reflects the average percentage of 2013-2014 and 2014-2015.
18	USNWR/ See note 3.
19	USNWR/ See note 3.
20	USNWR/ See note 3.
21	IPEDS. See note 1.
22	W&M Financial Reporting. *The percentage for 2016-17 has been updated based on audited financial statements for FY17 and that percentage is now 5.25%
23	W&M records. "Gifts" of \$100,000 and more are not included.
24	W&M records. "Gifts" of \$100,000 and more are not included.
25	W&M records. New gifts plus new commitments.
26	National Association of College and University Business Officers (NACUBO).
27	(NACUBO). See not 26.
28	Common Data Set (or institutional website, as available). CDS_H5: Average cumulative principal borrowed by undergraduate borrowers who started as freshmen at the institution and who had earned bachelor's in the current year.
29	Common Data Set (or institutional website, as available). CDS_H5a, column 3. Note that transfer students and debt accumulated at other institutions are excluded. Only students who started at and graduated from the respective institution are included, and only the debt those students accumulated while enrolled at that institution is reported.
30	The Facilities Condition Index (FCI) is a fitness indicator for the College's facilities and infrastructure. The FCI is the ratio of maintenance deficiencies (current plus project out two years) to the current replacement value of academic facilities. Industry standards suggest that an FCI of 5% or less indicates an excellent condition, 5% to 12% good condition, 13% - 29% fair condition, and 30% or higher poor or very poor condition. "All E&G Facilities" are those facilities supported by general funds allocated by the Commonwealth. These facilities include "major" E&G facilities (classrooms, class lab facilities, Wren Building, Admissions, Blow Memorial Hall, Cohen Career Center) and "minor" E&G facilities (e.g., Jamestown Road Houses, Galt Houses, Quonset Huts, physical plant-related facilities). E&G facilities do not have a revenue-generating component and exclude facilities that are self-supporting such as dormitories, athletic facilities, food service facilities.*The percentage of 2017-18 was updated on 3/28/2019.