Special Thanks

• Alumni House
• Technical Services & Office of Finance & Administration
• Guests/Speakers
• The Assembly
Featured Guests

- President Reveley
- Babs Bengtson
- Sam Jones
- Amy Sebring
- Dania Matos
Development Support Fund

The Results & Future Plans
Year One – 2016-2017

• Total Applications: 61
• Total Funds Requested: $73,845.45
• Total Funds Awarded: $25,000
• Amount of Funds Returned: $9,900
Year One – 2016-1017

Development Support Fund Awards by Employee Classification
Year One – 2016-2017

Amounts Awarded

- Staff
- PPF
Year One Testimonial

The session on challenging assumptions about black athletes was worth the trip alone. It provided real insight into potential impact of current events on athletes; possible helps and hindrances in direct work with athletes of color; and point/issues to consider to further cultural competence both individually and for the field of sport psychology.

– Deidre Connelly, Athletics
I was able to obtain MBTI certification. Now I can use this certification to help our students with career development in a more personalized, self-exploring way. I can also work with the young staff of our Center and provide training/retreat team building exercises in a more detailed way. Previously, we were spending a lot of money to hire consultants when we needed this work done. Now I am in-house and able to help way more people!

-Roxane Adler-Hicks
Year Two – 2017-2018

• Big Change: Team Applications
• Total Number of Applications: 53
  – Number of Qualified Individual Applications: 38
  – Number of Qualified Team Applications: 8
### Year Two – 2017-2018

<table>
<thead>
<tr>
<th>Distribution</th>
<th>Percent</th>
<th>Amount</th>
<th>Amt Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>PPF</td>
<td>57%</td>
<td>$16,809</td>
<td>67.2%</td>
</tr>
<tr>
<td>Staff</td>
<td>60%</td>
<td>$ 8,191</td>
<td>32.4%</td>
</tr>
</tbody>
</table>
This forum demonstrated the metric adopted by a world ranking survey. Under this metric, W&M ranks much lower than US News. Knowing this let our IR office provide modes of evidence-based advice to the decision making group about whether W&M should choose to participate in the ranking survey.

- Zhong (Eric) Liu
We attended many sessions on digital technologies and eLearning strategies that acted as a sounding board for our efforts at W&M. We connected with people and resources to help us further develop our professional learning program.

- Adam Barger, APel Team
Future Plans

• Budget Line Item
• Two Rounds of Applications
  – Round One – Summer and Fall
  – Round Two – Late Fall & Spring
Future Plans

• Increase number of Staff Applications
• Continue Team Applications
• Find better communication methods
  – Applications Open
  – Who received funds
  – Testimonials
Projects under construction

• McLeod Tyler Wellness Center
• Landrum Hall
Mcleod tyler wellness center

$19,000,000
Completion: July 2018
Landrum hall

$19,463,177
Completion: August 2018
Projects in design

• Fine & Performing Arts Complex Phase I & II
• West Utilities Plant
• Alumni Center Renovation & Expansion
Fine & performing arts complex

$118,503,000
Completion: December 2020
West utilities plant

$30,264,000
Completion: MAY 2019
Alumni center

$20,698,000
Completion: October 2019
Projects in preplanning

• Muscarelle Museum Renovation & Expansion
• Sadler Center West Addition
• Green & Gold Village Replacement/Renovation
• ISC 4
Current topics

• 2018-2020 State Biennial Budget
• FY19 University Budget
• Financial Operations
  – Chrome River Implementation
  – America To Go
  – Compliance Update
State Revenue Forecast improving

• FY17 general fund (GF) revenue grew 3.6% exceeding the forecasted growth of 2.9%.
• For FY18 year to date (ytd), GF revenues have grown 5.9% through December – significantly ahead of the 3.4% forecast.
  – The month of December saw double digit growth (10%) as taxpayers filed nonwithholding payments ahead of the January 16, 2018 deadline.
  – With 3.8% growth ytd, sales and use tax has also exceeded projections of 3.0% growth.
  – By contrast, tax withholdings are lagging projections slightly at 3.0% ytd versus the projected 3.5% annual growth rate.
GOVERNOR’S BUDGET PRIORITIES

• $481.0 million GF biennial increase in mandated re-benchmarking of K-12 Standards of Quality
• $575.8 million GF biennial increase in mandated increases for Medicaid utilization and inflation
• $270.7 million GF to bolster cash reserves tied to bond rating
• $100.7 million GF for the state share of a 2% salary increase for teachers and state employees in FY20 (effective November 10, 2019)
• $104.5 million GF biennial increase for new initiatives in higher education
• Assumes $421.7 million in additional revenue over the course of the biennium due to Medicaid Expansion
<table>
<thead>
<tr>
<th>Key Higher Education Priorities</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Undergraduate Need-Based Financial Aid</strong></td>
</tr>
<tr>
<td>$16.2 million in FY19</td>
</tr>
<tr>
<td>$29.3 million in FY20</td>
</tr>
<tr>
<td><strong>Research Investments</strong></td>
</tr>
<tr>
<td>Maintains $80 million debt authorization in each year</td>
</tr>
<tr>
<td>Maintains $8 million annually for Va Research Investment Fund</td>
</tr>
<tr>
<td><strong>Increased Funding for Maintenance Reserve</strong></td>
</tr>
<tr>
<td>$25 million increase above FY18 for both FY19 and FY20</td>
</tr>
<tr>
<td><strong>2% Salary Increase</strong></td>
</tr>
<tr>
<td>Provides state GF share for 2% salary increase for all employees (including faculty) in FY20</td>
</tr>
</tbody>
</table>
## Proposed W&M Funding – Introduced Budget

<table>
<thead>
<tr>
<th></th>
<th>FY18 Base</th>
<th>FY19 Proposed</th>
<th>FY20 Proposed</th>
<th>$ Increase Over FY18 Base</th>
</tr>
</thead>
<tbody>
<tr>
<td>Undergraduate Need-Based Aid</td>
<td>$4.39 million</td>
<td>$4.50 million</td>
<td>$5.04 million</td>
<td>$649,000</td>
</tr>
<tr>
<td>Equipment Trust Fund</td>
<td>$2.90 million</td>
<td>$2.90 million</td>
<td>$2.90 million</td>
<td>No change</td>
</tr>
<tr>
<td>Maintenance Reserve</td>
<td>$2.45 million</td>
<td>$3.67 million</td>
<td>$3.67 million</td>
<td>$1.21 million</td>
</tr>
<tr>
<td>Veteran’s Counseling Program</td>
<td>New initiative</td>
<td>$160,050</td>
<td>$287,850</td>
<td>$287,850</td>
</tr>
</tbody>
</table>
Language amendments

• Governor’s introduced budget includes language, as requested, to allow W&M to extend Tier 3 status to RBC if needed to assist RBC operations

• Restoration of financial incentives under restructuring

• Authorization to create a reserve fund – capped at 3% of E&G GF appropriation
Other W&M Items

W&M OPERATING BUDGET
- **Whole of Government Initiative** to develop first-year M.P.P. curriculum on-line
  - NOT funded in the introduced budget
  - Have requested $250,000 in FY19 and $200,000 in FY20 through the General Assembly amendment process; Senate amendment included in regular session

W&M CAPITAL BUDGET
- **Swem Library First Floor Renovation** - $10.7 million GF
- **Pop Lab Renovation** - $8.5 million GF
  - Did not submit through General Assembly amendment process due to state debt capacity and queuing of already authorized capital projects

Statewide Compensation Actions
- House amendments in the Regular Session provided for: 1) a 2% one-time bonus in December 2018 for classified and operational staff only, and 2) an effective start date for 2% salary increase in FY20 to July 2019
- Senate amendments included no compensation action in FY19 or FY20
2018 special session

- The regular session of the General Assembly ended on March 10, 2018 with no action on the biennial budget.
- Governor has called a Special Session starting April 11, 2018.
  - Introduced budget bill mirrors the bill in the regular session with the exception of the new proposed restrictions on any GF $ above projections.
William & Mary
next steps in budget process

• Incorporate final State actions
  – House and Senate will release their budgets on February 18th
  – General Assembly expected to adjourn on March 10th
  – Governor expected to sign budget bill by April 18th

• Address W&M’s on-going funding needs for need-based aid under the Promise with increasingly diverse student population

• Determine annual and long-term business innovation targets

• Finalize FY 2019 budget recommendations for BOV action in April.
Financial operations

• New initiatives
  – Chrome River – online travel/meal reimbursement system; final rollout expected by May 31
  – America To Go – online catering portal, expected to rollout for July 1

• Compliance Update
Questions?

Amy Sebring
asebring@wm.edu
x1-1722
Diversity & Inclusion Update
PPFA
Dania Matos, Deputy Chief Diversity Officer
Office of Diversity & Inclusion
March 29, 2018
Current Initiatives:
Lunch and Learn 2017-2018 Series
*It’s Not Just Black and White: Understanding the Breadth and Depth of Diversity & Inclusion*

- 8/24/17: Supplier Diversity
- 9/13/17: Understanding the Basics of Intersectionality
- 10/3/17: Microaggressions: Prevention and Processing
- 11/6/17: Fireside Chat with President Reveley
- 1/17/18: Proactive Planning: Supporting and Including LGBT+ Students and Employees
- 2/15/18: Religious and Spiritual Diversity and Pluralism: The Road Less Traveled
- 2/27/18: 100 Years of Women at William & Mary
- 3/15/18: A Kink in the Rainbow: LGBTQ Quality of Life from the Black Cat Riots to the Pres(id)ent
Current Initiatives:
Innovative Diversity Effort Awards (IDEA) Grants

- Tutoring for Social Change
- DACA -Ally training for W&M Faculty and Staff
- NASPA Multicultural Institute (NMI) Conference
- Exploring Equity in STEM Education: A Workshop Series
- Connecting Communities: Building bridges of support to ensure success in the graduate school environment
- Community building and professional development events for SWMS and VIMS
- Social Justice & Diversity Professional Development Lecture Series and Conference Presentations
- Integrative Diversity & Inclusion Forum/Panel
IDEA GRANTS

Connecting Communities:
Building bridges of support to ensure success in the graduate school environment

Participate in a workshop series aimed at connecting faculty, staff, and graduate students across the four professional schools at William and Mary. Participants will discuss (or learn off) the experiences of different self-identifying groups on campus and brainstorm ways in which their actions can support others and further enhance diversity and inclusion on the VIMS and William and Mary main college campuses.

Registration opens March 19, 2018!

Workshop 1 – Faculty and Staff Participants
Tuesday, April 10, 2018
12:00 p.m.
Brinyk Commons MPR, Mason School of Business
Miller Hall, 101 Ukrop Way, Williamsburg, VA 23185

Workshop 2 – Graduate Student Participants
Friday, April 20, 2018
12:00 p.m.
Waterson’s Hall Classroom A/B, VIMS
1375 Great Rd, Gloucester Point, VA 23062

Workshop 3 – Faculty, Staff, and Student Participants
Wednesday, April 25, 2018
12:00 p.m.
Waterson’s Hall Classroom A/B, VIMS
1375 Great Rd, Gloucester Point, VA 23062

Lunch will be provided for all workshop participants!

Transportation between VIMS and the W&M main campus will be provided for the first 11 registrants of each workshop who request a ride.

Special Thanks to our organizers, collaborators, and lunch sponsors!

2ND ANNUAL DIVERSITY & INCLUSION FORUM

THE WILLIAM & MARY OFFICE OF HEALTH PROMOTION AND HEALTH OUTREACH PEER EDUCATORS (HOPE)

INVITE YOU TO OUR ASSEMBLED PANEL OF EXPERTS FROM ACROSS THE COMMONWEALTH.

WE WELCOME YOU TO THIS DYNAMIC DIALOGUE THAT WILL ADDRESS THE VITAL ROLES OF DIVERSITY AND INCLUSION IN THE UNIVERSITY’S HEALTH AND WELLNESS INITIATIVES.

APRIL 3 2018 | 7-8PM
COMMONWEALTH AUDITORIUM
DESSERTS BY CARROT TREE BAKERY

OUR PANELISTS

Guest Facilitator: Roxie Patton, W&M Center for Student Diversity

Tal Lewis, Executive Director
Side by Side

Rev. Lestelle Cross
Founder
Will You Be White

Elisa Monterey, EEO Deputy Chief Diversity Officer
W&M Office of Diversity & Inclusion

Fatima Smith
Associate Director
VCU Grace E. Harris Leadership Institute

Alex Hilbert
Student Director
W&M New Leaf Clinic

2ND ANNUAL DIVERSITY & INCLUSION FORUM

APRIL 3 2018 | 7-8PM
COMMONWEALTH AUDITORIUM
DESSERTS BY CARROT TREE BAKERY
Diversity Action Plans

- Met with all academic departments
- Updated plans will be submitted June 30, 2018
- Currently meeting with administrative units/schools
Trainings

- Law School Faculty
- School of Education Faculty
- Arts & Sciences Deans
- American Studies Graduate Students
- American Studies
- VIMS Sea Change Education Staff
- VIMS Administrative Forum
Current Initiatives

• Faculty/Staff Diversity Symposium, October 2017
Current Initiatives

• Student Diversity Symposium: February 2018
Task Force on Race and Race Relations Implementation Team

• Task Force made 51 recommendations
• Task Force Implementation Team’s work will conclude in May 2018.
  – E.g., Increase the diversity of the faculty and senior administrators, and demonstrate commitment to this goal with a $35 million-dollar investment of resources. Six faculty of color have been hired through the Provost’s Hiring Initiative. They are in the following departments: Government, Kinesiology, English, Education, Business, and Music.
• Recommendations will be submitted to President Reveley and the BOV in April.
Current Initiatives

- Search and Recruitment Procedures

- Affirmative Action Plans

- ADA Accommodations for Faculty/Staff
Current Initiatives

Diversity Recognitions

The Office of Diversity & Inclusion welcomes campus community members to nominate a colleague to be recognized for a diversity-related program or project that furthers our commitment to inclusive excellence. To nominate a member of faculty / staff, please fill out this [form](http://forms.wm.edu/32004) also available at: http://forms.wm.edu/32004
Current Initiatives

VOICES Newsletter

• VOICES provides an update on the university's diversity efforts in facilitating and supporting diversity and inclusion. Each issue shares the good work of academic and administrative departments, students, affinity groups and more.

• [http://www.wm.edu/offices/diversity/programsandservices/voices/index.php](http://www.wm.edu/offices/diversity/programsandservices/voices/index.php)
New Initiatives

• Transformative Dialogues
  • 8/24/17 After Charlottesville Dialogue
  • 1/26/18 DACA-Ally Training

• Diversity Committees Bootcamp

• IDEA Unity Grant

Transformative Dialogues: Circles of Change

Given the powerful conversations that occurred during our “After Charlottesville” dialogue, the Office of Diversity & Inclusion (ODI) is piloting a new initiative called “Transformative Dialogues: Circles of Change” which strives to provide opportunities and spaces to engage respectfully and thoughtfully with each other across our differences.

Starting in Spring 2018, we will be partnering across campus to bring such dialogues with actionable solutions.

The format will always consist of round tables (“circles of change”) with the intention that the participants at each table create their own actionable solutions to the topic being discussed and continue the work beyond the dialogue.

Please consider joining this critical work. The potential impact of this initiative depends on the contributions of many individuals across the breadth of the William & Mary community.

If you have any ideas on dialogues that we should be having at William & Mary as a part of this initiative, we welcome your thoughts HERE.

For any additional questions, comments or concerns, you may contact Dania Matos, Deputy Chief Diversity Officer at dmatos@wm.edu.
Questions?

• Chon Glover – wfglov@wm.edu

• Dania Matos – dmatos@wm.edu

• Sharron Gatling – sgatling@wm.edu
The PPFA represents you!

For 750+ PPF’s on campus, the PPFA

✓ Ensures PPF’s representation
✓ Monitors issues
✓ Provides feedback and recommendations to administration
✓ Monitors and clarifies policies and benefits
✓ Enables us to speak with one voice
PPFA Representation

21 members on the Assembly

– VIMS
– School of Education
– Mason School of Business
– Student Affairs
– SWEM Library
– Information Technology
– Economic Development and Business Innovation
– Financial Aid
– Advancement
– Arts & Sciences
– Athletics
– Auxiliary Services
The PPFA

Standing Committees

– Academic
– Administrative
– Communications
– Membership
– Professional Development
Meeting Dates & Guests

- July 12, 2017
- September 6, 2017 – Ron Starzman & Babs Bengtson
- October 4, 2017
- November 1, 2017 – John Poma & Jennifer Fox
- December 6, 2017
- February 1, 2018 – Henry Broaddus & Mark Patterson
- March 1, 2018
- April 5, 2018 – Colin Smolinsky
- May 3, 2018
- June 7, 2018 – Babs Bengtson & Mane Pada
Accomplishments

• Proposed Tuition Waivers for part-time, salaried employees
• Conducted performance planning and evaluation surveys
• Secured PPFs inclusion in service awards & Employee Appreciation Day
• Partnered with Staff Assembly to create the Professional Development fund
Overview of year

- Membership: Assembly attrition
- Provided feedback about FMLA, and I-9 Clearance
- Professional Development
- Social events for Assembly
- Holiday giving with Staff Assembly
- PPFA Local Account
2017 – 2018 Goals

• Membership
  – Bylaws for Membership
  – Elections
  – Social event

• Professional Development
  – Marketing opportunities for training and development

• Administrative
  – Regular dialogue with Human Resources
  – Collaboration with Staff Assembly
PPFA Elections

• NOMINATE AND VOTE for Assembly members! We are looking for 6!
• https://www.wm.edu/sites/proffaculty/
• Nominations: 3/28 – 4/12
• Elections: 4/23 – 5/11
• New members welcomed by 5/15
Looking Ahead

• President-Elect: Julie Summs
• Representation from:
  – Law School
  – Facilities Management
• Next meeting: April 5th @ 8:15am – BOV room in Blow Hall
Thank You

Questions or Concerns

Terry Fassanella

tafassanella@wm.edu