

CELEBRATING TRADITION & FORGING CHANGE:

# AN EVOLVING PLAN FOR WILLIAM & MARY

September 2009



## WILLIAM & MARY

A LIBERAL ARTS UNIVERSITY OF  
COMPELLING ACADEMIC DISTINCTION

## Planning Sequence 2009-2010

---

April	BOV approved planning framework
May-June	Subcommittees drafted implementation steps
July	President reviewed draft, reconstituted PSC
August	Subcommittees and PSC reviewed FY10 steps, FY11-14 framework
September	Progress report to BOV Steps and metrics for FY10 Evolving framework for FY11-14 Draft dashboard
Fall	PSC reviews implementation steps with constituencies VPs, deans, selected directors – submit FY11-15 ideas PSC identifies planning issues
January	PSC begins drafting FY11 steps and FY12-15 framework
February	BOV discusses implementation update and emerging issues
March	PSC recommends FY11 steps and FY12-15 framework President reviews FY11 steps and FY12-15 framework and recommends to BOV
April	BOV discusses FY10 implementation; reviews FY11 steps and FY12-15 framework

## Our Vision

---

William & Mary will continue to be one of the world's great liberal arts universities. Already a university of compelling academic distinction, the College will expand its interdisciplinary study, global relevance, and faculty-student research, as well as its lifelong ties with alumni. Our students come wanting to change the world and will leave with the tools to do it.

WILLIAM & MARY

A LIBERAL ARTS UNIVERSITY OF  
COMPELLING ACADEMIC DISTINCTION

# Six Challenges

---

We are focusing on six challenges. They emerged from extensive discussions with all constituencies as the most important opportunities to advance toward our vision in the next five years.

1. Be a leader among **liberal arts universities**.
2. Build and support a **more fully diverse W&M community**.
3. Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.
4. Implement a **new financial model** that can fund our aspirations.
5. Provide the **administrative resources and infrastructure** required for a university in the 21<sup>st</sup> Century.
6. Explain and promote W&M through a more effective **communications structure and strategy**.

# Implementation Discussion

---

The following slides list under each challenge selected implementation steps we will complete in FY10.

A separate report includes all the implementation steps and metrics for FY10 and an evolving planning framework of implementation steps under consideration for the FY11-14 period. Most of those items for FY11-14 can be pursued only if we are able to identify additional funds. The specific implementation steps will be refined and adjusted as the Planning Steering Committee continues its work.

## Challenge 1: Be a leader among **liberal arts universities**.

---

### Selected Steps for FY10

- Conduct conversation about the future of liberal arts education. Include interdisciplinary and internationalization issues. Produce white paper by April 2010 to guide any subsequent curriculum reviews. (Halleran) **(Priority)**
- Begin enrollment in new Marine Science minor. (Strikwerda, Wells)
- Conduct library needs assessment. (McCarthy, Appropriate Faculty Committees)
- Establish cross-disciplinary center for Science, Technology, Engineering and Mathematics (STEM) education for K-12 teachers.\* (McLaughlin)
- Reconvene the President's Advisory Committee on Internationalization in order to develop and implement a strategy for internationalization.\* (Halleran) **(Priority)**

\* Continues into FY11

## Challenge 2: Build and support a **more fully diverse W&M community.**

---

### Selected Steps for FY10

- Establish a full-time position of Assistant to the President for Diversity and Community Initiatives. (Reveley)
- Assess programs and services that assist students with college success, and reallocate funds as needed.\* (Ambler)
- Evaluate alternative ways to increase the number of international undergraduate students. (Granger)
- Review diversity of faculty at other universities by academic discipline and evaluate areas where W&M representation is less diverse. Also evaluate pools of available faculty. (Halleran)
- Highlight diversity as one of our key communication themes.\* (Golden, Glover)  
(Priority)

\* Continues into FY11

## Challenge 3: Develop an ever more engaging campus experience that inspires a **lifelong commitment** to W&M.

---

### Selected Steps for FY10

- Appoint group to coordinate "lifetime experience" activities, and make "W&M for a Lifetime" a central theme for Welcome Week and Convocation.\* (Coordinating Group) **(Priority)**
- Design "W&M for a Lifetime" campaign including activities that engage students, faculty, staff, alumni and the Williamsburg community. (Coordinating Group) **(Priority)**
- Develop plans to increase sport, recreation and exercise opportunities for all members of the W&M community and to enhance participation in athletics at the intramural, club, and intercollegiate levels. (Driscoll, Ambler)
- Begin construction of a 56-student residence on Richmond Road, with retail on the first floor.\* (Ambler, Buchanan) **(Priority)**
- Develop plans for the addition of new residence(s) on campus with space for approximately 200 students. (Ambler, Martin, Jones) **(Priority)**

\* Continues into FY11



## Challenge 4: Implement a **new financial model** that can fund our aspirations.

---

### Selected Steps for FY10

- Stimulate giving in all forms and identify resource requirements to significantly expand giving and initiate adjustments to increase alumni annual giving participation.\* (Pieri) **(Priority)**
- Develop plans to increase research sponsored program funding. (Manos, Strikwerda, Wells, McLaughlin) **(Priority)**
- Develop options to increase tuition, considering the student demand, our market position, competitive realities, restructuring agreements, declining levels of state support, and the availability of student financial aid. (Jones)
- Reconstitute the Committee for Continuous Improvement with expanded membership to identify potential savings and new revenue.\* (Jones) **(Priority)**
- Identify appropriate models/targets for determining competitiveness of faculty and staff compensation and for undergraduate and graduate/professional student financial assistance. (Halleran, Jones)

\* Continues into FY11

## Challenge 5: Provide the **administrative resources and infrastructure** required for a university in the 21st Century.

---

### Selected Steps for FY10

- Complete policies & procedures related to the University HR system and train College community on the performance evaluation system. (Martin)
- Deploy a modern, fault tolerant, network infrastructure (Carpenter). **(Priority)**
- Develop a Technology Integration Partnership of IT with the Charles Center to explore innovative approaches to teaching and research.\* (Carpenter, Schwartz)
- Complete preliminary designs to reconfigure and improve Tucker Hall and seek funds for the renovation. (Martin)
- Form a working group, including faculty and senior staff from IT and Registrar, to develop an integrated vision for collaborative teaching, learning and research space. (Martin)
- Implement the Eco-Ambassador Program to connect staff and students to identify opportunities and spread best practices.\* (Martin)

\* Continues into FY11

## Challenge 6: Explain and promote W&M through a more effective **communications structure and strategy**.

---

### Selected Steps for FY10

- Complete roll-out of the revised website, bringing units on line with common W&M format. (Evans)
- Identify and stress major communications themes consistent with the strategic plan. (Golden)
- Select a new mascot for W&M. (Driscoll, Reveley)
- Implement steps to increase coverage of research, scholarship and creative activities in targeted media and develop a plan to highlight exceptional W&M achievers in all fields for both internal and external audiences.\* (Golden)
- Complete a comprehensive review of communications and marketing at W&M by February 2010. (Golden) **(Priority)**

\* Continues into FY11

## Development of Metrics

---

- Level One -- W&M Dashboard (draft) – university level, public, linked to next levels of analysis, primarily data reported to the State and other agencies
- Level Two -- Elaborated data sets used by Vice Presidents and division and program leaders
- Level Three -- Measures directly related to each challenge and the implementation of objectives through individual steps
- New PSC Evaluation Subcommittee

# Dashboard

---

- Evolving Model
  - Include data reported to agencies to allow comparisons
  - Two primary dimensions: liberal arts university and finance
  - To date, limited chance for refinement by PSC
- Comparisons and Targets
  - Virginia publics; elite universities; different research levels
  - Targets will evolve during strategic planning studies
- Many missing measures
  - Quality of faculty – emerging standards but data collection is complicated; experimenting with software
  - Student research and scholarship – same issues, linked to our Quality Enhancement Plan (QEP)

# Dashboard

Measures	
1	Undergraduate acceptance rate
2	Middle 50% SAT scores
3	Undergraduate graduation rates
4	Undergraduate class size <20
5	US News & World Report: Nat'l universities
6	US News & World Report: Public universities
7	Student : faculty ratio
8	Undergraduate degrees awarded
9	Graduate/professional degrees awarded
10	Average Ph.D. stipends
11	Total sponsored program expenditures (millions)
12	Undergraduates who are members of race/ethnic minority groups
13	Undergraduates with demonstrated financial need
14	Average per-borrower cumulative undergraduate debt
15	Alumni giving participation rate: undergraduates with degrees
16	US News & World Report: Financial resources rank
17	Total Expenditures per FTE Students
18	Operating Expenses Provided by the State
19	Total Value of Annual Giving (in millions)
20	Total of all endowment (in millions)

Liberal Arts University

Finance

## Communications Review Process

---

- Jim Golden heads working group; President's Communication Group serves as steering committee; Communications Council with representatives from most units provides staff support
- Draws on work of Challenge 6 subcommittee; Art & Science Inc. study; brainstorming session with Janet Brashear and Jeff Trammell; interviews with Vice Presidents, Deans, other senior staff; benchmarking analysis of other universities; internal study teams led by members of the working group.
- Study group makes recommendations to Communication Group. Implement decisions as work proceeds. Record analysis, supporting material, decisions and remaining recommendations in project summary report by January 2010.

## Communications Review – Actions Being Implemented

---

- Stay on message. Internal message map with major themes and proof points drafted – implementing and refining: (1) university of compelling academic **distinction**, great liberal arts university; interdisciplinary; international; (2) lifetime **connections**; only one W&M; stewards of a great tradition (3) **engaged**; change the world; leadership (4) historic **place of possibilities**; welcoming community; innovation; value different perspectives (5) new **financial model** – flexibility, stewardship. Refining messages, proof points, illustrations, images. Integrated into annual communications plan.
- Build lifetime connections. Coordinating group for “W&M for a Lifetime” in place; Student group – Welcome Week, Convocation.
- Use President’s communication time more effectively. Annual President’s communication plan and process in place.
- Start the year with a clear set of university communications priorities by event and target group and coordinate execution. Annual W&M communication plan and process in place – event coordination, detailed communications plan for each event, key metrics, evaluation. Coordinated by President’s Communications Group.



## Communications Review – Other Issues Under Study

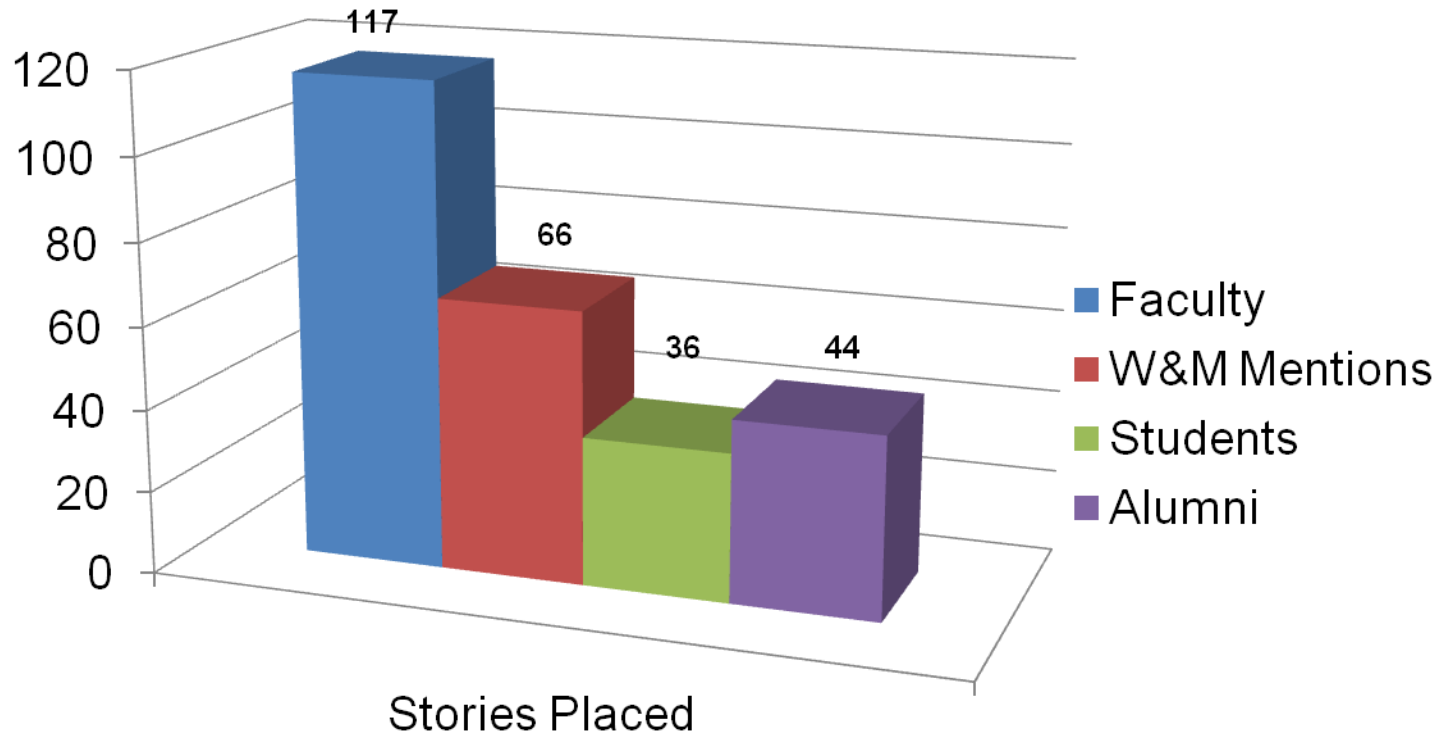
---

- Coordination of creative services and adjustment to new technologies and communication patterns. Initial study completed. Steps identified to coordinate creative services – web, print, video, marketing, images. Exploring implementation options.
- Coordination of University Development and Alumni Association communications. Recording steps underway and identifying areas for greater collaboration.
- Clearly define role of University Relations, match mission and resources, enhance coordination with units. University Relations review underway, steps identified to enhance coordination with units and clarify roles. Track and expand national coverage. Brian Whitson now Director.
- Clarify structure and responsibilities for internal communications – community building. Initial discussions.
- Communications organization – retain current matrix structure or make it more centralized? New position?



# National Media

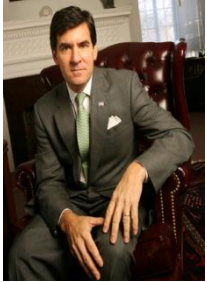
## Office of University Relations



January 1 through August 31, 2009

**National Media:** For these tabulations, national media constitutes print and online editions of newspapers that primarily fall in Editor & Publishers "Top 50 Newspapers" according to circulations and have a national readership or are the major daily newspaper for a geographic region of the United States. This category also includes broadcast, wire, print and online coverage by national television networks and national news; and feature magazines as well as selected, major, International media outlets.

# W&M IN MEDIA SPOTLIGHT



MITCHELL REISS

## The New York Times

Rethinking North Korea, With Sticks



Bill Clinton's North Korea Mission



Hillary Clinton's vow to keep Northern Ireland on her radar is no bad thing



Ramen noodles no more? College students go gourmet



Campus Cuisine: From Dorm To Dining Hall



Sir Christopher Wren Building: Sheltering Students for Three Centuries

## The New York Times

Republicans in Virginia Split Sharply Over Leader



JOHN MCGLENNON



GEORGE GRAYSON



Feds bolster agents on border with Mexico

## The Washington Post

Obama Steps Up Efforts to Stop Gun, Drug Trafficking Across Mexican Border



The Washington Post



William & Mary students break 'Thriller' dance record



SCOTT NELSON

## The New York Times

Why Bad Times Nurture New Inventions



Hobbies Long Gone

## THE WALL STREET JOURNAL

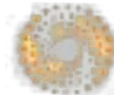
Victims' Speeches in Court Influenced Judge's Ruling

## Los Angeles Times

Bernard Madoff to hear sentence



JAYNE BARNARD



THOMSON REUTERS



Madoff gets 150 years for massive investment fraud



# Summary

---

President Reveley launched a new strategic planning process in academic year 2008-2009. The centerpiece of our strategy is to define and showcase William and Mary (W&M) as a university of compelling academic distinction, one of the world's great liberal arts universities. All of our other aspirations flow from this commitment. Major actions and decisions moving forward will build on our ability to combine the best elements of a liberal arts college and a research university with select graduate and professional programs. W&M's success in blending those two aspects is our great competitive advantage. To an extraordinary degree we effectively integrate teaching and scholarship and provide powerful faculty-student interaction. We will build on that foundation.

We will increase our emphasis on interdisciplinary and international programs.

We recognize the excellence that comes with inclusiveness, and we are committed to being a welcoming and supportive university.

We will focus as well on W&M as a lifelong experience. We will build a stronger sense of stewardship among our students and our alumni.

We will create and implement a new financial model to fund adequately our exceptional liberal arts university and to build a solid foundation for the future.

# Summary

---

The strategic planning process in 2008-2009 engaged all parts of the W&M community and produced a five-year strategic planning framework. The framework identifies six “grand challenges” of greatest importance to the future of the university, and includes goals and objectives for addressing each challenge. We will review and update the framework annually.

Implementation will include assignment of responsibility for each objective, development of specific metrics to track outcomes, and reports of performance against objectives. As a result, our planning and financial processes will become more transparent and more focused on strategic priorities. This document presents implementation steps for fiscal year 2010 (FY10) and the evolving planning framework for FY11-14.

