

COMMITTEE ON STRATEGIC INITIATIVES AND NEW VENTURES

September 26, 2013

4:45 – 5:45 p.m.

Board Room – Blow Memorial Hall

Thomas R. Frantz, Chair
Edward L. Flippen, Vice Chair
John E. Littel, Vice Chair
Robert E. Scott, Vice Chair
Peter A. Snyder, Vice Chair
H. Thomas Watkins III, Vice Chair

- I. Introductory Remarks – Mr. Frantz
- II. Strategic Planning Discussion Topics -- Provost Michael R. Halleran and Vice President James R. Golden
 - A. University Dashboard – Enclosure F.
 - B. Dashboard to Track Implementation of the W&M Promise
 - C. Business Innovation Project
 - D. IT Issues Related to E-Learning - Associate Provost/Chief Information Officer Courtney M. Carpenter
- III. Closed Session (if necessary)
- IV. Communications Update – Vice President Golden
- V. Adjourn

WILLIAM & MARY TOP LEVEL DASHBOARD

Measures+	W&M 2009-10	W&M 2010-11	W&M 2011-12	W&M 2012-13	W&M 2013-14	Target	UVA***	Brown**
Challenge 1 – Leading Liberal Arts University								
1. Undergraduate acceptance rate ^a	34%	32%	35%	32%	33%	34%	30% (Fall 2012)	10% (Fall 2012)
2. Undergraduate yield rate ^a	34%	35%	33%	33%	32%	34%	42% (Fall 2012)	56% (Fall 2012)
3. Undergraduate 25 th – 75 th percentile SAT score range ^{b1}	1240-1450	1250-1440	1240-1450	1250-1460	1270-1460	1250-1450	1260-1460 (Fall 2012)	1320-1530 (Fall 2012)
4. Undergraduate graduation rates ^a	90% 2004 cohort	91% 2005 cohort	90% 2006 cohort	Avail. 5/2014 2007 cohort	Avail. 5/2015 2007 cohort	93%	94% 2005 cohort	95% 2005 cohort
5. Student: faculty ratio ^{a3}	12:1	12:1	12:1	12:1	Avail. 3/2014	<13:1	16:1 2005 cohort	8:1 2005 cohort
6. Undergraduate small class percentage (2-19 students) ^b	48%	47%	48%	49%	Avail. 2/2014	50%	54% (Fall 2012)	70% (Fall 2012)
Challenge 2 – Diversity								
7. Undergraduate students who are members of historically underrepresented groups ^{a9}	23%	25%	26%	27%	Avail. 10/2013		27% (Fall 2011)	33% (Fall 2011)
8. Undergraduate students who are nonresident aliens ^a	2%	3%	3%	4%	Avail. 10/2013		6% (Fall 2011)	11% (Fall 2011)
9. Graduate/professional students who are members of historically underrepresented groups ^{a9}	13%	14%	15%	16%	Avail. 10/2013		17% (Fall 2011)	22% (Fall 2011)
10. Graduate students who are nonresident aliens ^a	12%	11%	12%	13%	Avail. 10/2013		12% (Fall 2011)	27% (Fall 2011)
11. Average per-borrower cumulative undergraduate debt ^{a3}	\$21,367 (2010 grads)	\$20,835 (2011 grads)	\$24,344 (2012 grads)	Avail. 2/2014 (2013 grads)	Avail. 2/2015 (2014 grads)	<\$20,000	\$21,591 (2012 grads)	\$23,521 (2012 grads)
Challenge 3 – Lifelong Connection								
12. Alumni giving participation rate: undergraduates with degrees ^d	23.4%	23.9%	Avail. 9/2013	Avail. 9/2014	Avail. 9/2015	30% by 2014	23% (USNews)	35.3% (FY2011)
Challenge 4 – Business Plan								
13. US News & World Report: Financial resources rank ^b	85	97	112	114	Avail. 9/2014	<70	55 (2012-13)	24 (2012-13)
14. Total sponsored program expenditures (millions) ^a	\$54	\$57	\$55	Avail. 4/2014	Avail. 4/2015	\$60 by 2014	\$354 (2010-11)	\$121 (2010-11)
15. Debt Service as Percent of Operating Expense ^f	6.7%	5.9%	6.6%	Avail. 9/2013	Avail. 9/2014	<7%	Not available	Not available
16. Annual Total Value of Private Gifts (in millions) ^{d6}	\$43	\$41	Avail. 9/2013	Avail. 9/2014	Avail. 9/2015	50	\$219 (2010-11)	\$164 (2010-11)
17. Endowment per student ^f	\$71,406	\$81,408	\$82,870	Avail 11/2013	Avail 11/2014		\$195,175 (2010-11)	\$298,425 (2010-11)
Challenge 5 – Administrative Resources and Infrastructure								
18. All E&G Facilities Condition Index ^{a5}	7.6%	7.8%	6.3%	6.5%	Avail. 2/2014	<10%	7.5% (2011-12)	Not available
Challenge 6 – Communications								
19. US News & World Report: National Universities ^b (Ranking for year data collected)	31 (tie)	33 (tie)	33 (tie)	32 (tie)	Avail. 9/2014		23 (tie) (2012-13)	14 (tie) (2012-13)
20. US News & World Report: Public Universities ^b (Ranking for year data collected)	6	6	6	6	Avail. 9/2014		2 (tie) (2012-13)	Not applicable

+Preliminary list. A measure of the quality of faculty is under discussion.

*Years vary by data availability as noted in W&M data

**Denotes schools with a medical school and engineering program

^a From Integrated Postsecondary Education Data System 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)

^b From US News & World Report: rankings published in September based on data submitted in previous spring. Reported for year data collected.

^c From Common Data Set (or institutional website, as available)

^d From Council for Aid to Education/Voluntary Support of Education

^e Calculated by facilities management for submission to State Council of Higher Education

^f Internal calculation using data included in the College's annual audited financial statements

^g From National Association of College and University Business Officers (NACUBO)

¹ Calculated by adding the 25th and 75th percentiles for Critical Reading and the percentiles for Math.

² Figures are estimates for current year or actual for previous year

³ Average cumulative principal borrowed by undergraduate borrowers who started as freshmen at the institution and who had earned bachelor's in year previous to when IPEDS report was submitted

⁴ Includes W&M and VIMS operating and non-operating expenditures; excludes independent operations, auxiliary and hospital services expenditures. Operating expenditures include instruction, research, public service, academic support, student services, institutional support, operation/maintenance of plant. FTE count includes both graduate and undergraduate students and is based on Fall Headcount (similar to NACUBO).

⁵ The Facilities Condition Index (FCI) is a fitness indicator for the

College's facilities and infrastructure. The FCI is the ratio of known maintenance deficiencies to the current replacement value of academic facilities. Industry standards suggest that an FCI of 5% or less indicates good condition, 5% to 10% fair condition, and above 10% 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.

⁶ Annual rate based on Council for Aid to Education/ Voluntary Support of Education. For UVa, 2-year average from US News & World Report is used

⁷ Also includes race reported as unknown and non-resident alien

⁸ Does not include faculty or students in stand-alone graduate or professional programs (i.e., Law and, prior to 2010, VIMS)

⁹ Underrepresented groups include American Indian or Alaska Native, Asian, Native Hawaiian/ Other Pacific Islander, Black or African American, Hispanic or Latino, Two or more races. Underrepresented groups do not include White, Unknown, Nonresident aliens.