

VII.



Richard Bland College

of WILLIAM & MARY

SIX-YEAR PLAN 2018-20 through 2024

Part II NARRATIVE

A. Institutional Mission & Vision with Contextual Overview

When the Board of Visitors approved RBC-19 in April of 2013, Richard Bland College of William & Mary (RBC) began researching data-driven solutions for student support. In January, 2015, a model was identified that aligned with the newly stated **Vision** of RBC: *Richard Bland College is in the vanguard of learning-outcomes based liberal arts education for university transfer and a model for testing and applying outcomes-driven solutions in higher education.* In April, 2015, with the financial support of the college Foundation, RBC entered into a partnership with IBM-Portal to launch the Exceptional Student Experience at Richard Bland College (ESE@RBC) in pursuit of the College's bold vision of 100% student success. The scope of the project was to build a predictive analytics tool that would alert the College when a student was at-risk.

The outcome of the project was designed to customize student support for all students, shifting to a "one size fits one" model of student support to improve retention and graduation. To achieve the results RBC needed from the predictive model, the College revisited business processes and synchronized limited resources to ensure that students were getting the most effective support. The result was a highly personalized, student-centric, wrap-around support and advising model that uses data to achieve better student outcomes and improved engagement and retention. Richard Bland College's **Mission** is *to prepare students for university transfer through academically rigorous programs grounded in the liberal arts tradition of William & Mary, and to expand access to college credentials through strategic partnerships, specialized programming, and scalable innovation.*

The IBM-Portal relationship brought much more than data to improve student success. It also brought contacts with colleges in the United Kingdom where a similar student-centric model had already been deployed. In November 2015, RBC's President, Dr. Debbie Sydow, visited Brockenhurst College to learn how they used the Learner Mentor student model, along with predictive student data, to improve student outcomes. Connecting with Brockenhurst allowed RBC to reflect on what other gaps existed in processes and what investments would be needed going forward. This process identified the need for an internal data warehouse that would allow for the connection of disparate data from a variety of systems, placing pertinent information about each student readily available to RBC advisors and support staff.

Beginning Fall 2016, after construction of a data warehouse to bring multiple data points together, RBC deployed its own model for the prediction of propensity of incoming freshman to

drop. The model demonstrated a reliability factor of approximately 73%. Furthermore, by the start of the Fall 2018 semester, Learner Mentors, faculty and support staff will have one system to view, utilize, and record student data and interventions. Bringing these resources in-house has made it possible for RBC to effectively streamline business processes and increase timeliness and accuracy of the data needed to improve student outcomes.

What started out as a pilot project to determine if RBC could use an effective data-driven approach to support student success has become the fundamental essence of RBC institutional culture. It is the College's primary objective to identify high-potential students not yet ready for or comfortable with a four-year institution, provide them with individualized and proactive support and walk them, hand-in-hand, from applicant to graduating on time to transferring to a 4-year college or entering the workforce with little to no college debt. All items in RBC's six-year plan focus on the achievement of that goal.

B. Prioritized Strategies

1. Administrative Stability / Risk Management

In order to effectively support RBC's mission, the College continues to explore ways to adequately and efficiently respond to recurring APA (Auditor of Public Accounts) recommendations through administrative infrastructure upgrades (technology solutions and adequate staffing of RBC finance functions) to minimize risk to the College and the Commonwealth.

The fundamental plan to accomplish the stability needed utilizes service-level agreements and in-house hiring based upon recommendations from a joint RBC and William & Mary Work Group. In December 2017, the Presidents of RBC and W&M entered into an MOU to improve financial operations at Richard Bland College by tapping the expertise of W&M talent, namely the CFO, who will oversee RBC's chief business officer for the duration of the agreement. Closer alignment with the Financial Operations team at W&M is expected to improve business processes and operational procedures.

To the extent that resources permit, the College will continue its painstaking efforts to establish adequate administrative staffing levels and a stable and efficient infrastructure. Based upon analysis conducted to date by William & Mary, external consultants, and RBC, an approximate \$1.8 million infrastructure investment (including personnel and technology) is needed to create a reliable, compliant administrative operation that minimizes risk to RBC, William & Mary, the BOV, and the Commonwealth of Virginia. RBC will make significant improvements with the \$550,000 included in General Fund Appropriations for FY 19 and FY 20. However, the remainder of the \$1.8 million (\$1,247,750) is still needed to ensure long-term sustainability. Without these funds, RBC continues to be at risk of a protracted stabilization endeavor.

In the current political environment and with additional funds from the General Assembly, RBC does not intend to increase annual tuition more than 3%-5% for the next biennium. RBC is

cognizant of the level of risk that the current administrative infrastructure presents and has worked diligently over the last five years to balance investment in compliance with investment in the academic and student support services necessary to fulfill the College's core educational mission. Throughout, the administration has pursued innovation and demonstrated an entrepreneurial spirit, achieving notable success in growing enrollment (and related revenue) and, at the same time, generating new revenue through auxiliary operations and development efforts.

The College remains focused on its key strategic planning goals to:

- a. Achieve optimal enrollment and deliver academic programs and services that respond to market demand;
- b. Collect, analyze, disseminate and utilize pertinent performance-related information to drive quality and continuous improvements;
- c. Develop and implement revenue enhancement plans; and
- d. Deploy financial, physical, IT and human resources in direct support of the mission and vision.

Even as the College reaches a state of equilibrium for institutional and O&M spend, there is a continued focus on spans of controls, automation of processes, and technical improvements. The College continues to drive auxiliary revenue through multiple uses of its campus facilities, with a focus on strategic partnerships that advance the educational mission. The Dinwiddie County Teen Expo, Master Gardener's workshop, Jacob's Ladder, Chrysalis, Camp Rainbow, VA STEAM workshop, Pecan Festival and summer sports camps are just a few events recently hosted by RBC. Not only have these projects allowed for increased brand awareness and auxiliary revenue but they have improved community relations and have been (and will be) further expanded to provide experiential learning opportunities for RBC students.

2. Exceptional Student Experience (ESE@RBC)

With a continuing emphasis on retaining and graduating students on-time and debt-free, RBC continues to expand and improve the ESE@RBC program, which was piloted in FY16 and fully launched in FY17. ESE@RBC combines highly personalized student support with predictive analytics, alerting appropriate faculty and staff members when student behaviors or other obstacles threaten their academic success. Each student is assigned a Learner Mentor who serves as coach, guide, mentor and advisor, using real-time information to keep students on track to graduation.

ESE@RBC enhancements include cross-training and customer service training in all aspects of the student experience—making persistence a campus wide endeavor with all faculty and staff trained and bearing responsibility for student retention, graduation and transfer. In FY19 the College will develop a second-year experience course to build on the First Year Experience (FYE) piloted in FY 18. The goal of FYE is to equip students (approximately 2 in 5 of whom are first-generation) with the necessary study and life skills to excel.

Expanding on collaborations and professional development made possible by the Complete College America initiative (spearheaded by SCHEV), RBC will build out a comprehensive program designed to prepare undecided students (over 70% at RBC) to identify a major and a transfer goal in the first semester of their second year (\$50,000 in FY19 from Tuition and Fees, \$50,000 in FY 20 from Tuition and Fees).

In keeping with institutional effectiveness goals and continuous improvement processes, the College's Enrollment Management Plan was updated in 2017-18 with an ongoing focus on attracting students for whom Richard Bland is a good fit—this is a move away from generic recruitment strategies and activities and toward target marketing. With a data warehouse now in place, we have the ability to analyze historical trends in planning and decision-making processes. The availability of reliable information allowed the recruitment process to be refined. For the first time, the College utilized Whiteboard Higher Education's offerings, which are laser-focused on brand building, lead generation, interest cultivation, and conversion at all phases of the student recruitment funnel. In essence, we maximized return on a small recruitment budget, and Fall 2018 enrollment projections are very positive.

RBC's student profile has been shifting by design in accordance with RBC-19 target goals. Intercollegiate athletics was introduced in 2013, and there are now more than 80 student-athletes on campus, most of whom reside in residence halls. The Honors program, which was launched in 2014, is expanding and a new Promise Scholars pipeline to W&M was introduced in 2018. A partnership with Navitas is bringing more international students to campus, along with support services to ensure their success. Historical data indicates that students with a GPA of less than 2.5 do not typically succeed at Richard Bland. In the fall of 2017, RBC implemented an admission standards change, increasing the minimum GPA to 2.5. This increase in admission standards was planned for well in advance of implementation, with provisions made to ensure that GPA was only one of several criteria considered for admission.

Once again, in keeping with ongoing assessment and continuous improvement processes, RBC has refined its admission criteria and in Fall 2018 will provide a pathway by which high-potential students not meeting the GPA requirement but demonstrating the capacity for academic success through other admission criteria will be accepted to RBC contingent on their participation in the CHOICE (Creating Holistic Opportunities in the College Environment) residential program. This living-learning community is designed to create an environment that supports student development through an interdisciplinary curriculum dedicated to student success and academic excellence.

3. Business Intelligence & Process Alignment

Business intelligence and process alignment enables data-driven decision-making and improved efficiencies, thereby contributing to high-performance operations and institutional effectiveness. High-performance business processes will continue to be established through:

a. Evolution of the current analytical models, and supporting data warehouse, used for business intelligence, identification of student progress toward success and internal process improvements,

b. Implementation of technologies that deliver metrics in real time through visualization and engagement at every level.

Merging the systems created as a part of ESE@RBC and the business intelligence initiative into a single, fluid structure will serve as a model for other institutions. Enhancements in real-time delivery and, more importantly, real-time data capture from discovered events that affect outcomes, will be a primary focus as the analytical models and processes are fine-tuned.

- Staff two incremental FTE positions (BI/Database Developer and a mid-level Applications Developer) in FY 19 to accommodate data needs arising from expansion of ESE@RBC and BI requirements to support process initiatives: 2 FTE in FY19 - \$252,000 (salary and benefits).

High-performance business processes are key differentiators between good and great institutions. The primary way of reaching the “great” pinnacle is to execute business processes with maximum efficiency and effectiveness, and to make the smartest decisions possible.

4. Faculty & Staff Compensation

As part of an overall focus on improving the campus culture and workplace environment, in December 2017, RBC employees had an opportunity to participate in a workplace climate survey. The College seeks to utilize employee feedback from this survey to implement changes that will advance the college’s workplace culture. This will allow us to establish a competitive position with peer institutions with whom we compete for talented faculty and staff. The RBC workplace climate survey identified compensation as a top concern. To address this, the College will engage in total compensation studies for instructional faculty, administrative & professional faculty, as well as classified staff. The objective is to understand the fairness and competitiveness of our faculty and staff compensation in an effort to attract, retain, and motivate highly qualified employees to advance the College mission and strategic goals. Through these compensation studies, the College will design compensation programs that are sustainable and equitable for the future, encourage retention, and avoid salary compression. Institutions often are unable to absorb the cost implications of a revised structure in one year so the goal is to appropriately realign RBC faculty and staff pay over time. Salary increases will likely include both an across-the-board percentage increase and a merit component based on annual evaluations.

5. Mission Aligned Academic Portfolio

Promise Scholars Program

The presidents of RBC and W&M signed an MOU in November 2017 creating the Promise Scholars program, designed to ease transfer for high-ability, Pell-eligible students from RBC to William & Mary. The program will provide William & Mary courses and faculty at Richard Bland, scholarship funds, guaranteed housing, peer-to-peer support and mentorship to eligible students who have committed to transferring to W&M. William & Mary has selected six Promise Fellows, and beginning Fall 2018, one of these faculty members will travel to the RBC campus to teach one of W&M's COLL courses each semester, giving these students the opportunity to participate in W&M's core curriculum and fulfill several transfer requirements required for cost containment and timely graduation.

Work College Model Development

In FY 19, RBC will complete the discovery phase of a Work College model initiative focused on providing students with hands-on experiential learning through a guided work experience that is supplemental to their regular studies. RBC will explore opportunities to create a college environment where students, with proper supervision and training and using private and public sector partnerships, will obtain relevant skills while at the same time covering most, if not all, of the cost of their education. A pilot program with 20 - 50 students will be launched in FY 20.

RBC will utilize the existing Statesman Scholars program to reduce the cost to Virginia students with high-need and high potential. Currently, Statesman Scholars who are Federal Pell Eligible and have a high school GPA above a 3.5 are awarded a total financial aid package that includes federal, state, and institutional support. For these students, the College packages grants and scholarships cover up to 80% of total out-of-pocket costs. Of this population, the College would select a pilot group of students who would receive the remaining 20% as institutional work-study, making College free for this population.

In conjunction with private sector partnerships and RBC guided projects, students participating in the pilot would be employed in the areas of data analysis, logistics, project management, hospitality and other high-demand fields with professional growth in such sectors as a key objective (\$50,000 in FY 19, \$100,000 in FY 20). To ensure that skills and experiences are relevant to the workforce, RBC will create a Business Council that meets at least two times each year to create a direct business link. RBC will also convene work sessions so that staff and faculty can hear directly from business leaders about the workforce needs of the region and state.

Dual Enrollment

Effective pathways for high school students to earn college credit and reduce overall college costs has become increasingly important as demonstrated by legislation passed by the General Assembly in 2018. It is more important than ever that institutions run quality programs that can meet the needs of the Commonwealth's school districts.

With the passing of House Bill 3, additional administrative burden will be placed on RBC's already small staff, risking losses in capacity in order to maintain quality and effectiveness. A

study done by the VCCS indicated that the cost of running a quality dual enrollment program is approximately \$80 per credit hour per student. While maintaining current levels of service, RBC would like to investigate more efficient and cost effective models for providing dual enrollment coursework to our primary feeder schools without passing the increased cost to students or their families.

BANNER (ERP) Replacement – Project Canceled

In FY 2018, Richard Bland College (RBC) began a preliminary project to identify a replacement Enterprise Resource Planning (ERP) system because the existing platform, Ellucian Banner, is costly, inflexible and inappropriately scales to RBC. We requested funding for the costs associated with that replacement system. Since that time, William & Mary and RBC have signed a Memorandum of Understanding (MOU) with the charge of exploring shared services and other options for increased collaboration.

In accordance with the MOU, dated November 15, 2017, Richard Bland College agrees not to shift from the existing ERP because the move to a different system would make integration of financial reporting with William & Mary cumbersome. For this reason, RBC has removed this initiative from the institution's 6-year plan.

C. Evaluation of Prior Six-Year Plan

SEM Plan: During the 2017 & 2018 Biennium, the College continued the implementation on a Strategic Enrollment Management (SEM) plan that increased student headcount to 2,256 (well above the FY 19 target of 2,000), and 1,342 FTE toward a target of 1,500.

Centralized One-Stop: In 2017, the College fully implemented a new Exceptional Student Experience program that goes well beyond centralized services. This model assigns a caseload of students to a Learner Mentor who becomes a primary point of contact and an advocate for the student throughout the learner journey. The program is still in its infancy, but early results are promising.

Learning Outcome Culture: The College completed its 5th Year Interim Report to SACSCOC in 2015 and a monitoring report in 2016. A second monitoring report was submitted in Fall 2017, and in December 2017, RBC was removed from monitoring with no further follow up required. A broad-based, course-level learning outcomes assessment program is now in place for all courses. Further, RBC is now assessing program-level outcomes for all identified curriculum goals in all programs at the College. The intent is to build learning outcomes assessment processes to ensure that course-level outcomes roll up into department-level outcomes, which roll up into program-level outcomes. Richard Bland College is currently going through SACSCOC reaffirmation as a member of the class of 2019. The Compliance Certification Report has been successfully completed, with the onsite review taking place in October, 2018.

Academic Portfolio: The College was approved by the Department of Education as an “Experimental Site” for Prior Learning Assessment and Competency Based Education (CBE) Credit (1 of only 3 colleges in Virginia). A recent redesign of the Associate of Arts curriculum and repackaging of the Associate of Science degrees have facilitated the delivery of CBE. The General Education core will require an e-Portfolio for all students. Students will have the opportunity to utilize portfolio assessments to receive credit without having to complete an entire 3-credit hour course. This will eliminate so-called “momentum blockers” that students experience when taking a class in which they have already mastered some or all of the content. Students can bridge the gap with online content toward the College’s Associate Degrees.

The College has expanded online course offerings with the Associate of Business degree and Associate of Science available online, providing students the convenience they need to successfully complete a degree or certificate. The College has also implemented certificates of Liberal Arts, Project Management and Logistics, all of which can be obtained through distance learning.

Resource Alignment: Between 2012 and 2016, the College underwent an extensive re-organization to reduce administrative expenses and to reinvest in the core academic program of the institution. In FY 16 and 17, the investment focused on the Exceptional Student Experience, an innovative and highly promising student-success model. It also focused on strengthening core back office functions, an effort that will continue in order to achieve financial stability.

D. Tuition Rate Increases

After an extended period (20+ years) in which the College virtually froze tuition and fees at rates that were woefully insufficient to support basic operations and compliance, let alone keep up with inflation, tuition/fee increases accomplishes two things. First, it brings the College into alignment with other residential colleges that provide robust student support services to promote student success, including the innovative ESE@RBC program. It also advances institutional effectiveness and compliance, providing necessary funding for baseline administrative support as dictated by best practices and the increasing volume of reporting required by state and federal entities.

Given the additional funds allocated by the General Assembly in the FY 19 budget and the current political environment, we do not intend to increase annual tuition more than 3%-5% for each year of the next biennium. This represents \$8 per credit hour at 3% and \$10 per credit hour at 5%.

Financial Aid

The College currently allocates \$91,872 per year from tuition and fee revenue to offset the impact of tuition and fee increases on low- and middle-income students. This amount will continue in future years. However, instead of further investment, the College will utilize unfunded scholarships (waivers) to advance SEM goals and to assist the high-need student

demographic, which is increasing. The utilization of unfunded scholarships (waivers) will allow the College to assist more students by awarding additional institutional scholarships.

E. Contributions to Economic Development

The College is an economic driver in the depressed Petersburg region. According to a recent study by the Weldon Cooper Center at UVA, College expenditures in FY 2015 had an employment effect of 255 personnel and generated \$14 million in state GDP and \$1 million in state revenues. These estimates include the direct economic effect of college-related spending, as well as the economic indirect and induced effects (i.e., multiplier effects) that result from purchases and payroll turnover when money changes hands in the state economy. Human capital improvements are estimated to contribute a present value of \$7 million in GDP and approximately \$1 million in state tax revenue. The total economic contribution resulting from RBC operations during FY 2015 was \$21 million in GDP and total state tax.

Academic programming developed in response to high demand fields like logistics and project management have been added in recent years. The College is actively engaged with regional Chambers of Commerce, the Crater Planning District Commission and Petersburg Area Regional Tourism, providing a venue for their events as well as student and employee volunteers. The College's Pecan Festival, which attracted more than 12,000 visitors to campus last fall, generated significant tourism dollars for the Petersburg region. The Comprehensive Economic Development Strategy (CEDS)—a federal program—contributes to effective economic development in America's communities and regions through a locally-based, regionally-driven economic development planning process. The College is represented on the Petersburg Chamber of Commerce, the Hopewell/Prince George Chamber of Commerce, the CEDS board and other economic development entities in the region. Additional opportunities to stimulate economic development in the surrounding region through community involvement and partnerships with Virginia's Gateway Region and Crater Planning District Commission are currently being explored.

F. Capital Outlay

The College's Board of Visitors approved priorities for the institution's six-year plan, including the following items, as part of the FY16–18 Biennium.

*Construct/Renovate: Academic Innovation Center/Library Expansion
\$12,421,253 GF*

Approved for detailed planning during FY 2018, the project provides an expanded concept of the library as a modern tool for fostering innovation in scholarship while also providing renewed space for study and collaboration. The Center for Teaching & Learning will provide a unique cultural center that inspires, supports, and contextualizes users' engagement with scholarship. A flexible, equipped space will inspire connected learning for a networked world through faculty

development, student engagement, communities of practice, and technology-enhanced active learning. A renewed building filled with natural light, innovative media and displays of artwork and views of campus will engage imaginations and inspire conversation and reflection. This plan calls for approximately 10,000 sq. ft. of library resources, 7,000 sq. ft. of Information Technology Services and data center and 7,000 sq. ft. for academic innovation and training. A new elevator will be necessary to meet ADA requirements and to accommodate the change in space design.

Redundant High Speed Internet Connection
\$500,000 GF

Richard Bland College presently operates with single point of failure through its existing high speed internet connection. With more hosted services utilized by the college, student online interaction with campus services and a growing portfolio of online courses, a second high speed internet connection is essential to mitigate risk of an outage caused by provider issues or physical line loss. A critical failure of internet service would essentially close the campus until resolution, which could have a high impact on student success and revenue. Installation of the new line is estimated at \$500,000. The annual subscription cost of the redundant high speed internet service will run approximately \$50,000. RBC has been exploring broadband expansion with Dinwiddie County through the Tobacco Commission.

Instructional Technology Update
\$486,000 HEETF

Instructional technology deployed in McNeer Hall is approaching end-of-life. Costs estimated to install current, supported instructional technology is \$18,000 per classroom. With 27 classrooms in McNeer Hall, a \$486,000 investment is necessary.

Backup Generators for buildings lacking electrical backup resources
\$600,000 GF

Four buildings critical for college operations lack a backup generator. The estimated one time capital costs to acquire, install and configure all four of these incremental generators is \$600,000. Annual maintenance agreements for these incremental devices is estimated at \$4,000.

G. Restructuring

Richard Bland College is steadily building its administrative capacity to either restructure to a Level II institution in the next two years, or to become a part of William & Mary's Level III structure during their next renewal cycle as authorized by the legislation approved in the 2019 FY budget. In the interim, RBC seeks the ability to do the following in some structured capacity independent of the Level I institution requirements.

- 1. Procurement.** In an effort to better manage RBC's limited resources (both personnel and fiscal) and create efficiencies by leveraging an already proven concept and pre-approved set of contracts, RBC seeks to use VASCUPP (Virginia Association of College and University Procurement Personnel) contracts without additional approval from the Department of General Services (DGS).

- 2. Tuition Management.** Given the fluctuations in state funding and declining growth in overall state support over the last decade, it is essential to Richard Bland College's health that the Board of Visitors maintain the ability to set tuition and fees for its students. The Board of Visitors is uniquely positioned to understand the institution's operational model, financial needs, and market position relative to peer institutions both within and outside of the Commonwealth.

- 3. Carryforward of E&G Funds.** The College's ability to carry forward E&G funds from year to year is essential given the uncertainties of state funding and the volatility of higher education markets. Institutions must be able to manage funds prudently without fear of penalty if they spend less than budgeted in a given year. With that assurance, institutions can more effectively manage and establish reasonable reserves to ensure they remain financially solvent during economic downturns and do not have to seek additional state support or burden students with additional costs to cover those gaps.