



CELEBRATING TRADITION & FORGING CHANGE:
A PLAN FOR WILLIAM & MARY

April 2009



WILLIAM & MARY

A LIBERAL ARTS UNIVERSITY OF
COMPELLING ACADEMIC DISTINCTION

Executive Summary

President Taylor Reveley launched a new strategic planning process in academic year 2008-2009. The process will produce a five-year strategic plan (Plan), updated annually each spring, through an open, inclusive process. This is the first of those Plans. Each year, the Plan will focus on “grand challenges” of greatest importance to the future of the university. The implementation of the Plan will include assignment of responsibility for each objective, development of specific metrics to track outcomes, and open reports of performance against objectives. As a result, our planning and financial processes will become more transparent and more directly focused on strategic priorities.

The centerpiece of our strategy over the next five years is the fact that William & Mary has clearly defined itself as a “liberal arts university.” All major actions and decisions moving forward will build from our ability to combine the very best elements of a liberal arts college and a research university. W&M’s ability to balance those two aspects make us a great university. Our niche is characterized by effectively integrating teaching and scholarship, supporting interdisciplinary and international programs, and recognizing and promoting the kind of faculty-student interaction that distinguishes W&M as being among the very best.

Executive Summary

This commitment to academic excellence and to our niche as an outstanding liberal arts university is central to our strategy. All of our other aspirations flow from that commitment. We recognize the insight and excellence that come with inclusiveness, and we are committed to building a welcoming and supportive university. We will work to strengthen our community and we will focus on W&M as a lifelong experience. Our strategy recognizes that we need a new financial model to fund adequately our exceptional liberal arts university and to build a solid foundation for the future. We will develop a new financial model that is consistent with our aspirations.

Our Vision

Historic William & Mary is a liberal arts university of compelling academic distinction -- one with interdisciplinary study, international focus, and emphasis on faculty-student research.

Our students come wanting to change the world and they leave with the tools to do it.

WILLIAM & MARY

A LIBERAL ARTS UNIVERSITY OF
COMPELLING ACADEMIC DISTINCTION

A Unique Combination

William & Mary

Celebrating tradition & Forging change

Alma mater of a nation & Citizen of the world

Dedicated to teaching & Devoted to research

Large enough for excellence & Small enough for community

Whole-heartedly undergraduate & Selectively professional and graduate

Graced by alumni who have served & Inspired by students who strive to lead



Six Challenges

1. Lead as a model **liberal arts university**.
2. Build and support a **more fully diverse W&M community** that demonstrates the strengths of inclusion.
3. Build an ever more engaging educational environment that maximizes student learning, fosters personal development, and inspires a **lifelong commitment** to W&M.
4. Develop and implement a **business plan** that maximizes revenue sources and ensures transparent resource allocation in support of College priorities and needs.
5. Provide the **human and material resources and infrastructure** necessary to operate the College's administrative and academic support functions with the high level of expertise, efficiency, and cooperation required for a modern liberal arts university.
6. Articulate more clearly W&M's identity, mission, and goals, and implement a more effective model for internal and external **communication**.

Challenge 1: Lead as a model liberal arts university

Goal: Embed core values -- intellectual curiosity, rigor, diversity, and engagement; dynamic pedagogies and research models; lifelong learning; ethical conduct and moral integrity -- at all levels

Task Force to lead conversation about the attributes and purposes of liberal arts education in the 21st Century; Confirm importance of honor code; Review undergraduate curricula including course loads, student-faculty ratios

Goal: Support for research, scholarship, creative activities

Faculty support, undergraduate research, graduate stipends, importance of ISC3, IT

Goal: Support innovation

Promotion criteria, interdisciplinary incentives, strategy for internationalization, community engagement, collaborative research, economic development outreach, spaces and creative use of IT to promote collaboration

Challenge 2: Support more fully diverse W&M community

Goal: Centralize diversity initiatives -- Leadership, training, share initiatives

Goal: Welcoming campus -- Accessibility, student retention support, cultural center

Goal: Increase diversity -- Recruitment of under-represented groups, international students, faculty diversity peer analysis, grants for socioeconomic access

Goal: Curricular offerings and delivery models -- Range of academic programs, Internationalization

Goal: Communications strategy to highlight commitment

Challenge 3: Engaging community – inspire commitment

Goal: Create community that values life in balance -- Student support and career services, professional development and family support

Goal: Increase inclusiveness and collective identity -- Physical meeting spaces, service learning, alumni engagement with campus, recognize contributions of athletics, importance of campus ceremonies and traditions

Goal: W&M lifelong relationships -- Alumni networks, courses, events; reinforce theme from first day; build on recent alumni research; advisory and leadership boards

Goal: Enhance meaningful engagement by all constituencies -- Review governance to enhance participation, expand student residential capacity -- consider surrounding community relationships

Challenge 4: Business plan

Goal: Revenue

Expand development funding, increase alumni participation from 20 to 30%, increase research funding by 50% over ten years, take advantage of market position, tuition review, communication with Richmond, non-degree professional development programs

Goal: Resource allocation and transparency

Develop models/targets for competitiveness of faculty and staff compensation and for student financial assistance, one-time seed funds for priorities, sunset provisions, continue PSC, budget information website, communication with leadership boards

Goal: Efficiency, effectiveness and entrepreneurship

Committee for Continuous Improvement, pool of seed money for cost-saving investments, restructuring relative to Commonwealth to improve administrative efficiency, encourage and reward entrepreneurial activity (new revenues, collaborations)

Challenge 5: Administrative and academic support

Goal: Workforce –

Training, compensation

Goal: IT infrastructure –

Hardware and software replacement, consolidated data, software to automate business practices, support research computing

Goals: Current and new facilities –

Preventive maintenance, space inventory system and master plan, classroom upgrades, facilities and infrastructure master plan

Goals: Risk management; sustainability; aesthetics –

Emergency preparedness function, rehearsals and drills, hazardous material management, legal services, information security; office of sustainability, education and training, reduce carbon footprint, sustainable land use; exterior maintenance, landscape master plan

Challenge 6: Effective internal/external communications

Goal: Distill and promote common identity --

Small set of main themes, logo, align unit visual identities, school mascot, test perceptions and brand through systematic research

Goal: Forge lifelong relationships -- support goals in community section

Goal: Enhance position among nation's leading universities --

Raise profile of faculty at students in university community, increase national media coverage

Goal: Integrated, coordinated, sustainable W&M communications --

Comprehensive review of communications and marketing by Feb 2010 – gap analysis, resource allocation, role alignment; appropriate balance of new and traditional media with greater emphasis on multimedia broadcast, new media content, and social networking

Ten Early Priorities

- Liberal Arts conversation; comprehensive undergraduate **curriculum review**
- Incentives for **collaboration** and innovative use of IT – review of merit and promotion system, related incentives, and governance structures and internationalization; experiment with social networking tools
- W&M as a **lifelong experience** – core messages integrating recent survey findings, plan to engage alumni in life of campus; stress inclusiveness of community; celebrate and communicate successes in modeling the role of the student athlete
- Increase research funding by **50%** over 10 years
- Expand student **housing** and off-campus amenities – Richmond Road project, 200-bed residence on campus
- Continuous improvement and **entrepreneurship** – Committee on Continuous Improvement established
- Annual strategic planning with inclusive **Planning Steering Committee** process
- **IT** replacement and improvements
- Comprehensive **communications review** by February 2010
- Highlight **commitment** to diversity in strategic communications

Annual Process

- April: BOV approves 5-Year Strategy, FY10-FY14, and FY10 Budget
- Summer: President develops Implementation Plan, FY10-FY14 and reviews with PSC; President provides annual budget planning guidance for FY11
- September: President discusses Implementation Plan with BOV
- Fall: PSC reviews implementation, goals, objectives; updates benchmarks
- November: Progress reports on implementation to BOV
- Nov-Feb: PSC reviews 5-Year Strategy, recommends changes
- February: BOV reviews 5-Year Financial Baseline Analysis; discusses Plan implementation and potential changes
- March: President proposes 5-Year Strategy, FY11-FY15
- April: BOV approves 5-Year Strategy, FY11-FY15, and FY11 Budget

Implementation and Assessment

- Communication of Plan to various constituencies – feedback
- Administrative **Implementation Plan**
 - Assign responsibility
 - Review illustrative implementation steps
 - Refine cost estimates -- assess alternatives
 - Assign priorities consistent with fiscal constraints
 - Develop a one-page **institutional scorecard** including metrics for overall W&M performance
 - Develop **actions, metrics, timelines**
 - Reviewed by PSC
 - Integrated plan to BOV in September
- Track progress against metrics, periodic reports to BOV
- Five-year financial plan, annual budget plans, Development priorities, Continuous Improvement



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