

## **William & Mary Strategic Review: 2008-2018**

More historic perspective will be needed to fully assess the impact the changes made in the last decade will have on William & Mary's trajectory. But even now there is substantial evidence that the improvement will be significant, and that William & Mary is poised for even greater, sustained excellence. As President Reveley noted in his 2016 annual report, "... the nation's distinctive 'Public Ivy' keeps pushing toward what we want to become, not simply what we want to maintain." William & Mary is increasingly known not simply as a "preeminent liberal arts college" but as a "leading research university driven by the beating heart of the liberal arts."

President W. Taylor Reveley, III's tenure began in 2008 and is scheduled to extend through 2018. This review of that decade anticipates the search for a new President to assume office in July 2018 and the ultimate strategic planning that will be undertaken when the new President arrives. The goal is not to provide a record of the progress characteristic of all great universities, but to sketch areas of achievement in which William & Mary distinguished itself from its peers, areas that provide great promise for continued distinction.

Over that decade, the central ambitions of the Board of Visitors, President Reveley and the team he led were to restore in this century William & Mary's preeminence in American higher education and to achieve excellence in all aspects of the university's life of the sort long typical of its academic work. The university moved forward on several fronts to achieve those ends. The key changes in process were the development of a "living" regime of strategic management and the refinement of truly collaborative governance processes. In broad brush, the central achievements were a resurgence of pride in William & Mary, refinement of academic programs to tap the enormous potential of liberal arts education, emphasis across the university on the development and expansion of international connections, a bold reorganization of the university's financial foundation and dramatic changes in physical infrastructure to reinforce adjustments in academic programs. This review is organized around those central themes, recognizing that in practice the areas overlap and specific initiatives had impacts in several areas.

### Living Regime of Strategic Management

In February 2008 William & Mary faced a crisis of confidence when the Board of Visitors replaced President Gene Nichol after two and a half years in office. The Board asked Taylor Reveley, then Dean of the School of Law, to take over as interim president. A few months later in August, the Board removed the interim status and Reveley became W&M's 27<sup>th</sup> president. The crisis and the move to a new administration prompted a review of how William & Mary thought of itself, what it aspired to be, how it was perceived and how it communicated with its various constituencies.

One of the first steps was the development of an inclusive planning process that brought the administration, faculty, students, alumni and board members together to agree on a vision and the major challenges and opportunities facing the university. The Provost, P. Geoffrey Feiss until 2009 and then Michael R. Halleran, and the Vice President for Strategic Initiatives, James R. Golden from 2008 to 2014 and then Henry Broaddus, coordinated the process through a Planning Steering Committee representing the major constituencies. The initial plan, endorsed by the Board of Visitors in the spring of 2009, defined goals for progress in academics, diversity, student life, finance, infrastructure and communications. Over time, the plans became part of a strategic management system that annually reviews progress against the five-year strategic plan, develops a budget that reflects strategic priorities and assigns responsibility for a set of specific implementation steps for the coming year. The Planning Steering Committee guides the planning process, tracks progress using a university-level dashboard, reviews budget requests for their strategic importance, recommends annual updates to the Board of Visitors and tracks implementation. Every five years the Planning Steering Committee conducts an in-depth review of major challenges and opportunities and recommends more substantial revisions to the plan.

The centerpiece of the strategy has been to change lives for the better by being a university of compelling academic distinction, one of the world's great liberal arts universities. Major decisions focused on W&M's opportunities to combine the best elements of a liberal arts college and a research university with select graduate and professional programs. W&M would emphasize the integration of teaching and scholarship through powerful faculty-student interaction, providing one of the best undergraduate educations in the world while remaining a university internationally recognized for academic excellence.

The plans highlighted the potential for William & Mary to take even greater advantage of its strong position as a leading liberal arts university by emphasizing interdisciplinary perspectives and international connections. The plans saw opportunities to celebrate diversity, making the university even more welcoming, and to expand common experiences that would strengthen student and alumni ties to the "Alma Mater of the Nation." The university also had to deal with the reality that its operating model is typical of a distinguished private university in terms of both enrollment and student-faculty ratios, but its funding model is typical of larger public universities. As state support for public universities declined nationwide, W&M had to find a way to change its financial trajectory. It also had to do a much better job communicating with its various constituencies, and building a deeper, more open sense of pride in its accomplishments. Progress first required alignment on those goals.

## Governance

When a university's governing boards and administration are aligned with a common vision and common goals, great things can happen. When they are not so aligned, the consequences can be disastrous.

It was essential in 2008 to strengthen that alignment. A key first step was to heighten expectations for members of the leadership boards, particularly the Board of Visitors, the W&M Foundation Board and the Alumni Association to contribute in many ways, including philanthropic support. Coordination included numerous briefings by senior staff and increased communication across the three boards, including a joint meeting once a year.

In particular, progress required that the President and the Board of Visitors collaborate closely, agree on long-term and annual goals and share a willingness to move aggressively, even in the face of political orthodoxy. The Board, led successively by Rectors Michael K. Powell '85, Henry C. Wolfe '64, J.D. '66, Jeffrey B. Trammell '73 and Todd A. Stottlemeyer '85, played an active role reviewing strategic plans and tracking implementation. Under Rectors Trammell and Stottlemeyer, the Board encouraged the university leadership to pursue bold, audacious goals. The Board and the President agreed on a series of goals and aligned the President's annual evaluation with a review of progress toward them. They are quite ambitious, for instance providing and being recognized for the best undergraduate education of any college or university in the country, having the best undergraduate graduation rate of any public university and one of the best among all universities, achieving an undergraduate alumni giving participation rate of at least forty percent placing W&M among the top five schools in the country, more than doubling the size of the endowment, and making constant progress in the national standing of graduate and professional program, to highlight just a few. Many of those goals flowed from the strategic plan and several were reflected in a new financial plan known as the "William & Mary Promise" discussed in more detail below.

President Reveley also led a series of significant organizational changes to increase alignment with the strategic planning process and the goals that emerged from it. In 2008 Stewart Gamage, the VP for Public Affairs, left the university, and James R. Golden became VP for a new Office of Strategic Initiatives, with responsibility for university communications, strategic planning and strategic management. Subsequently, he adjusted the communications organization to merge responsibility for the web, social media and communications into a single university relations organization with expanded capacity for "creative services." After extensive review, and at the risk of stepping on what was thought to be the "third rail" of William & Mary politics, Reveley coordinated the union of Development and Alumni Engagement into a new Advancement organization under VP Matthew T. Lambert '99. Reveley also created new legal, compliance and diversity offices. When the VP for Administration retired in 2015, Reveley merged the administration and finance

offices under a single senior VP, Samuel E. Jones '75, MBA '80, to streamline coordination. Those adjustments are explained in more detail below in the explication of the major strategies.

Over the course of the decade, President Reveley oversaw the hiring of a provost, four of the six deans, the athletic director (in progress at this writing) and all but one of the vice presidents. That one became senior VP over finance and administration, as noted above. Enclosure 1 provides further detail. Those adjustments provided the opportunity to ensure alignment of organization and strategy.

William & Mary's royal charter established the honorary position of Chancellor, initially held by 13 Englishmen from 1693 to 1776. Subsequent Chancellors included George Washington and more recently Chief Justice Warren Burger, Lady Margaret Thatcher and former Secretary of State Henry Kissinger. Associate Justice Sandra Day O'Connor served from 2005 to 2012 and Robert M. Gates '65, L.H.D. '98, former head of the CIA and Secretary of Defense under two presidents, became Chancellor in 2012. No summary of the past decade would be complete without acknowledging the enormous contributions that Justice O'Connor and Secretary Gates made through the stature they brought to the university and the insight and indefatigable energy they added to innumerable events.

#### Resurgence of Pride in William & Mary

The deep commitment to William & Mary of the leaders of the university's various constituencies, the enhanced coordination across those groups, the refinement of the strategic management processes and the organizational alignment behind the resulting strategies produced several truly significant changes over the decade. Chief among them was a resurgence of pride in the Alma Mater of the Nation.

William & Mary, chartered in 1693 and the nation's second oldest college, gained early prominence as one of America's preeminent academic institutions. The College educated several of the most important leaders of the new United States – Washington, Jefferson, Monroe, Marshall, to name a few – and with the nation's first school of law William & Mary emerged as its first university in 1779. That prominence faded through the 19<sup>th</sup> century and it agreed in 1888 it to a modest infusion of funds from the Commonwealth of Virginia, ultimately being codified as a state university in 1906. More recently, the university has surged in prominence, including recognition in 1985 as a “public ivy” and high national rankings over the past two decades.

But in 2008 William & Mary was still far from the dominant position it held in its early years. It was widely regarded as a very good and affordable higher education institution of modest size and scope. But the university had changed in many ways. While retaining an outstanding liberal arts college at its core, it had grown into a research university. Its reputation did not match its new scope and potential. Its

brand was very good, but not great. A resurgence in pride was needed to build momentum behind the goal of being a truly great university of international stature, to raise the university's trajectory and to match the high expectations of its leadership. That pride would be reflected in the way faculty, students and alumni spoke about William & Mary, wore its colors, and supported its future.

A resurgence in pride was particularly important to the university's financial future, which increasingly depended on funds from new sources. As noted earlier, William & Mary's operating model was typical of a distinguished private university in terms of both enrollment and student-faculty ratios, but its funding model was similar to larger public universities, with heavy reliance on state funding. State funding across the nation, however, was in a secular decline because of rising competing priorities and the advent of the Great Recession. It was, in short, caught in the middle. Either the operating model or the funding model had to change. In the words of one rector, it was time to "be bold, or go home".

Changing the university's trajectory required renewed pride, a deep sense of common commitment and an understanding of what might be possible. President Reveley established a VP-level communications group that met monthly to explore how best to achieve those goals. The central idea was that William & Mary should achieve the kind of excellence in its events and communications that had long been characteristic of its academic programs. Communications had to be redirected from traditional print to reflect the new ways in which people wanted to receive information. Events had to have clear messages, they needed to bond participants to William & Mary in meaningful ways and they had to be conducted in a way that built pride in the university's high standards.

One immediate goal was to align university communications with the themes emerging from the strategic planning process and to deliver messages using the social media and video technologies that were increasingly in vogue. The first step was to consolidate web and print communications into a new Office of Creative Services under the VP for Strategic Initiatives and to reallocate resources to video and social media. Subsequently, that office was merged with University Relations so that messages could be created once and then delivered in multiple formats. That organization then led the development of a new William & Mary identity with consistent formats, colors and logos deployed across the university.

President Reveley decided that William & Mary needed a mascot to increase excitement at athletic and other major campus events. The creative services team made the search for the mascot a major media event, with a web-based election featuring caricatures of the four finalists. The Griffin, a mythical eagle-lion that guarded treasure, emerged as the new mascot to a fanfare of national media coverage.

Part of the new identity was to find ways to make it clear that "The College of William and Mary" was in fact a research university with a distinguished liberal arts college at its core. Indeed, it was arguably the nation's first university given the

addition of a professorship in law in 1779. The leadership elected not to pursue a formal change in the name in 2008 because the “College” brand was very strong, particularly with older alumni. The term “College”, however, was increasingly problematic despite its long history. International connections were expanding and the “College” label was confusing in global academic circles. Potential research funders also tended to underestimate the university’s research capabilities. The solution was to develop a new identity emphasizing the ampersand as a symbol that the university embraced a combination of distinctive strengths. Without great fanfare, University Communications began to refer to “William & Mary” as “the university” and “The College” as the undergraduate school.

The Communications Group also decided to restore emphasis on William & Mary’s status as a “Public Ivy”, one of eight identified by Richard Moll in his 1985 book. In 2008 the reference was not widely used at William & Mary, perhaps because some thought it elitist and others wanted to emphasize the university’s unique strengths rather than Ivy envy. But the term did resonate with the university’s aspiration to build a deeper sense of pride, and the description is perhaps more apt for William & Mary than for any other school. The university is very similar to the northern Ivys in age, historic preeminence, size, campus beauty, student-faculty ratios and academic distinction. William & Mary also has the same emphasis on competitive athletics without sacrificing academic standards typical of the Ivy League.

The Public Ivy emphasis was just one part of a broader embrace of William & Mary’s diverse history in all its dimensions and a square focus on educating leaders of character for the larger good. That included celebrating a rich tradition of leadership and public service stretching back to George Washington, Thomas Jefferson, James Monroe, John Marshall and many others. The tradition of alumni service and leadership in each of the nation’s wars was reflected in an expanding partnership with military organizations in Virginia, particularly the Army’s Training and Doctrine Command (TRADOC) at nearby Fort Eustis. The tradition of leadership and service embraced student, faculty and alumni roles in community activities and national organizations. William & Mary has been, for example, a leading contributor to the Peace Corps and Teach for America. The William & Mary vision emphasized working together to help change the world for the better.

Embracing history in all its diversity also meant it was essential to ensure the campus was welcoming to all and to acknowledge William & Mary’s own involvement with slavery and the complexities of race relations since the Civil War. In 2009 the Board of Visitors established “The Lemon Project: a Journey of Reconciliation” to explore the history of African-Americans at the College and in the greater Williamsburg community. The project was named for a slave owned by the College in the early 18<sup>th</sup> century. That same year President Reveley established the position of Chief Diversity Officer and in 2012 he merged two organizations to create the Office of Diversity and Equal Opportunity to help achieve the university’s high expectations for equal opportunity and fair treatment. There was progress on several fronts as the diversity of the student body increased. In 2008, 20 percent of undergraduate

students were members of historically underrepresented groups and by 2016 that had grown to 29 percent. The percentage grew from 13 to 18 for graduate and professional students. In 2013, William & Mary was ranked first among all public universities by “The Journal of Blacks in Higher Education” for the smallest gap between white and black graduation rates. But many challenges remained, and in 2015 President Reveley established a Task Force on Race and Race Relations, which provided 51 recommendations to improve the racial climate. Subsequent actions included renaming the Jamestown Residence Halls for Lemon and Carroll Hardy, a revered administrator, establishment of a fund to increase faculty diversity and formation of a standing Diversity and Inclusion Committee. In the summer of 2015, President Reveley, at his own initiative, made the decision to remove Confederate iconography, including the Confederate battle flag, from the university mace and a Civil War plaque at the Wren Building.

Universities in general have people who are passionate about social injustice. Social media have increased the immediacy of events happening elsewhere, so remote protests can quickly stir resonant actions on campus. That is particularly true when those events are related to student needs and concerns, which have arguably become more numerous and more complex than in the past. The major social topics over the past decade have included sustainability, LGBTQ issues, the payment of “living wages” to low-income employees, excessive drinking and hazing in fraternities and occasionally in sororities, town-gown concerns centered on student housing, combat veteran issues, dealing with disabilities, helping students with mental illness and emotional distress (especially during years of campus suicides), sexual violence and harassment, racial issues, concerns with career counseling and job placement (particularly in the wake of the great recession) and dealing with reactions to the 2016 presidential election. All of those issues exist on campus to some extent. Various triggers, internal or from off campus, give different ones primacy at various times, sometimes gradually and occasionally with little warning.

William & Mary has managed to deal with those issues in a generally responsive and effective way, more successfully than many universities, by moving with sufficient speed and respect to keep the peace, encourage dialogue and address real concerns. Various task forces and committees provided opportunities to discuss issues and seek appropriate solutions. President Reveley and Provost Halleran were visibly engaged in leading the conversations. In spring 2010, President Reveley was the first university leader in Virginia to issue a response to the Virginia Attorney General's review regarding discrimination policies on college campuses. At question was whether gender identity and expression should be covered and President Reveley made it clear that W&M felt they should be. In fall 2016, President Reveley joined other university presidents in signing a letter shortly after President Trump's election calling for current DACA (Deferred Action for Childhood Arrivals) students to be able to finish their education at university campuses and the university created an online DACA resource hub. In spring 2017 President Reveley submitted an affidavit, as chair of the Virginia Council of Presidents, on the impact of the January 2017 Executive Order on Immigration. The president submitted the affidavit at the request of

Attorney General Mark Herring, who had announced that the Commonwealth of Virginia was joining a lawsuit regarding the Executive Order.

In general, the university succeeded in keeping the volume at a level that permitted discourse. Even the most challenging moments provided teaching opportunities to reinforce the central precepts of a liberal arts education, encouraging thoughtful dialogue and the reasoned exchange of ideas. Civility and calm on campus were generally maintained, except for one episode early in President Reveley's tenure when a few students pursued their "living wage" campaign by briefly occupying his office. But even the sit-in was relatively civil. For much of the 16-hour sit-in, President Reveley continued to work on one side of the office and the students occupied the floor on the other side. The event ended peacefully. The manner of dealing with student concerns generally strengthened confidence, and, yes, even helped to build pride in the W&M community.

Systematic changes in residence life, health and career services evolved not only to anticipate and deal with student concerns, but also as part of the general effort to promote excellence in all areas. Virginia Ambler '88, Ph.D. '06 became the VP for Student Affairs in 2009. After a review of Greek life on campus, 11 new fraternity residences were added with 180 beds. In collaboration with the Real Estate Foundation, Tribe Square opened in 2013 including 14 apartments with room for 56 students above retail dining space. Also in 2013 the university purchased the 330,000 square foot Hospitality House and converted the former hotel rooms into a new student residence called One Tribe Place. In 2016, the university collaborated with the Real Estate Foundation to acquire the Days Inn hotel on Richmond road for conversion to student resident swing space. Those expansions, discussed in more detail in the section on campus transformation below, provided room to take one student residence hall off line each year for much needed repairs and upgrades, modernizing HVAC systems and dramatically increasing energy efficiency.

Substantial progress was also made in student exercise and health services. The recently expanded Recreation Center next to William & Mary Hall was heavily used. Student Affairs expanded programs to meet the psychological and developmental needs of students, and hired additional staff including a full-time psychologist and psychiatrist. In 2013, various wellness activities were integrated and reorganized under a new Associate VP. Implementing the new integrated model, the McLeod Tyler Wellness Center, to be completed in 2018, will house the Student Health Center, the Counseling Center and components of Campus Recreation.

The recession in 2008 brought a renewed emphasis on job placement. The Cohen Career Center, which opened in 2010 between the Sadler Center and Zable Stadium, doubled the space the center previously occupied in Blow Hall. The building features a two-story reception area and resource lounge, an 80-seat presentation room, offices for professional career counselors to meet individually with students and a recruitment suite on the second floor that includes fifteen interview rooms. In



the Center's first year in its new location walk-in appointments increased 145 percent and total in-person student contacts increased 54 percent.

Intercollegiate athletics remain a centerpiece of the university's emphasis on leadership and excellence. Athletic Director Terry Driscoll is completing a remarkable 22-year career at William & Mary in 2017. During that period, varsity teams have compiled a league-leading 92 Colonial Athletic Association (CAA) team championships and 24 other conference championships. Academically, 125 teams had NCAA graduation rates of 100 percent. Since 2002-2003 when the CAA award was initiated, William & Mary has won 68 scholar-athlete awards, 26 more than the next highest school.

The intercollegiate athletic program has been particularly strong since 2008. During the nine years through 2016, William & Mary intercollegiate athletic teams won 44 conference championships including 41 CAA and three Eastern College Athletic Conference (ECAC), and 33 teams participated in NCAA championships. Sixty-six athletes won all-American honors. William & Mary athletes also excelled in the classroom. Forty students were selected as CAA scholar-athletes, leading the league in that distinction. Seventy-nine teams had NCAA graduation rates of 100 percent, and 15 athletes were admitted into the prestigious Phi Beta Kappa academic society.

In that period since 2008, more than \$32 million in facilities were constructed in support of the intercollegiate athletic program. New construction included the Jimmie Laycock Football Center (2008), the Martin Family Stadium at Albert-Daly Field for lacrosse and soccer (2011) and the Joe Plumeri Indoor Baseball Practice Facility (2016). The Walter J. Zable Stadium saw 109,000 SF in additions and renovations, including the new Smith-McGlothlin Grandstand (2016). The outstanding record of the athletic teams and those new facilities provide a foundation for continued excellence, as reflected in the 2015 report of the Committee on Competitive Excellence. The report affirmed William & Mary's identity as a place where athletes can be exceptional students and still have championship experiences. The report detailed, along with other operational recommendations, the need for private funds to enable transformational investments in scholarships, practice facilities, a flagship indoor arena and a swimming facility. One hundred percent of student athletes made a gift to the university in fiscal year 2016, leading the way in support of those goals.

As part of the effort to increase pride in the university among all groups, President Reveley established in 2008 a VP-level Lifelong Connections Committee to identify ways to strengthen student and alumni ties to campus. Several actions followed. Charter Day, a formal celebration of the William & Mary's founding held on a Saturday morning in February for a relatively small group of alumni in Phi Beta Kappa Hall, became a more festive birthday celebration on Friday afternoon when more students would attend. The venue moved to the much larger space in William & Mary Hall, the event put more emphasis on students and the ceremony ended with a

happy birthday rendition by a campus a capella group. Alumni homecoming events returned from off-campus sites to the Sunken Garden. Convocation in August was celebrated as a major campus event, with an expanded welcome line formed by returning students running from the Wren Building to the Sunken Garden punctuated by the rally band.

The renewed emphasis on alumni engagement led to an evaluation of how best to align organizations to support the effort. After long discussions, the Board of the William & Mary Alumni Association voted in 2014 to join the Association staff with the Development organization and other university staff to form a new Office of Advancement. The Alumni Association remained an independent organization, but the new structure allowed a more efficient use of resources to support alumni engagement. The VP for University Advancement, Matthew Lambert, then oversaw alumni engagement, philanthropy, annual giving, marketing and alumni communications. One immediate impact was expanded emphasis on regional presence and events, particularly in Virginia, D.C., New York, Chicago and California where there were significant alumni concentrations.

The regional events were used to increase excitement and organizational structure in anticipation of a major campaign, designed to strengthen alumni engagement, increase alumni participation in annual giving and raise funds for emerging strategic priorities. The official launch of the campaign in the fall of 2015 highlighted how far the university had come since 2008 in building pride in William & Mary and achieving excellence in its events and communications. The “For the Bold” campaign, with its ambitious goals to expand engagement, increase annual giving participation to 40 percent of undergraduate alumni and to raise a one billion dollars, was launched with a spectacular party in a huge tent structure on the sunken garden. William & Mary had never before had such a daring event, and the brilliance of its vision and execution in all respects demonstrated how far the capacity to deliver excellence in all areas had expanded. The 40 percent goal, if achieved, would place William & Mary in the top four of all U.S. universities. The one billion dollar goal was twice the goal of the prior campaign and the largest ever attempted by a public university of William & Mary’s size. Twenty months into the public phase of the campaign the results were already impressive. For the fiscal year ending on June 2016, participation had risen from 22 percent in 2008 to 29 percent, annual new private gifts and commitments had increased from \$39 million to \$143 million, and the campaign had already reached well over \$600 million. William & Mary was on a path to become not just good, but great. The university was a place that celebrated excellence, not just in academics, but in everything it did, including a series of highly successful events. Subsequent regional launches sustained the momentum. During the New York event in 2016, the Empire State Building blazed green and gold. William & Mary was a place, as it had been through its extraordinary history, for the bold.

## Academic Progress

The first goal in the strategic plan was to build on William & Mary's strengths as a leading liberal arts university, with an outstanding liberal arts college at its core complemented by a small number of distinguished graduate programs in the arts and sciences, business, education, law and marine science. In 2009-2010, Provost Halleran led a year-long discussion about how William & Mary could combine the best elements of a liberal arts college and a research university, effectively integrating teaching and scholarship to provide powerful faculty-student interaction. The conversation emphasized the university's strength in the creation of intense learning experiences – engaged learning – through inquiry, research, experimentation and application. Engaged learning required students to challenge and debate ideas and to take seriously views different from their own.

The discussion noted that William & Mary had many advantages in actually delivering engaged learning experiences, building on the 12-to-1 student-faculty ratio in its undergraduate program, the lowest ratio of any public university. Two core ideas shaped subsequent planning. First, the university had an extraordinary opportunity to deliver a cutting-edge liberal arts experience by showing how perspectives from the various arts and sciences could be combined. Rather than simply requiring students to take courses in different fields to sample the scope of the liberal arts, there was an opportunity to be more truly interdisciplinary and demonstrate how multiple perspectives could enlighten complex questions. Second, the university had significant potential to emphasize international connections building on expanding partnerships, study abroad, international enrollment and curricular design.

### Innovation

In 2010, Provost Halleran charged the deans of Arts & Sciences, business and education to undertake a curriculum review that should “above all else focus on developing the most vibrant and exciting liberal arts education for our students, leveraging core values with our distinctive attributes.” That charge was followed with two years of research, design, and faculty conversations led by an appointed Curriculum Review Steering Committee. The review focused on the “general education” requirements for all undergraduates, roughly one-quarter of the 120 credits needed for graduation. The general education requirements are in addition to the majors and elective requirements that round out the undergraduate academic program.

In fall 2012, that group turned its proposed curriculum over to the elected Educational Policy Committee (EPC), which has oversight of the general education requirements. The EPC led a year-long discussion and refinement of the proposals. The Faculty of Arts and Sciences voted in February 2013 to adopt a new framework and guiding principles for the general education requirements, and, in December 2013, it recommended a new College “COLL” Curriculum. In the old program,

students were exposed to the arts and sciences by simply taking or validating courses in different disciplinary areas, and most of those requirements were completed in the first two years. The new program, initiated with the Class of 2019 with a launch in fall 2015, requires a progression of interdisciplinary courses to be taken throughout the four-year experience, emphasizing inquiry (how to frame questions, reason, create alternatives and solve problems) and writing and other forms of communication. A new Center for Collaborative Teaching and Research was established to help develop courses for the program. The new curriculum received a strong endorsement when W&M received a \$900,000 grant from the Andrew W. Mellon Foundation to support implementation.

The emphasis on interdisciplinary collaboration was reflected as well in new facilities and research. Instead of replacing the aging chemistry and biology buildings, the university invested in a new Integrated Science Center (ISC) to emphasize connections across the science disciplines. The first phase opened in 2008 and the second in 2009. Together, those phases provided 70 research laboratories plus office space and support facilities for the departments of chemistry, biology and psychology. The third phase added space for applied science and psychology, the high performance computing team, as well as major elements of the university's programs in environmental science and neuroscience. The neuroscience program, for example, involves faculty from applied science, biology, chemistry, psychology, and kinesiology & health sciences who were formerly housed in four different buildings, but virtually all of them are now together in the ISC. The interconnected buildings create a truly state-of-art integrated, interdisciplinary science space. All told, the three phases included 280,000 SF of science facilities with a decade-long investment of roughly \$140 million.

Those facilities provided space for interdisciplinary collaboration and the integration of research and teaching, both vital connections at William & Mary. Other initiatives strengthened that relationship. In 2015, the Mellon Foundation awarded William & Mary a \$2.6-million grant to establish the W. Taylor Reveley, III Interdisciplinary Faculty Fellows, endowing fellows who develop and teach courses and lead concomitant research to extend the university's scholarly activity beyond the boundaries of schools and disciplines.

From 2008 to 2015, the university's sponsored program expenditures per year grew from \$50 million to over \$60 million, despite recession-induced reductions in state funds for research faculty at the Virginia Institute of Marine Science (VIMS). Much of that growth was the result of breakthrough interdisciplinary research, including the AidData initiative with its emphasis on big data and geospatial data analytics. AidData is transforming evaluation of the impact of international aid projects by developing geospatially coded data and making pertinent information more accessible and usable. In 2012, the United States Agency for International Development (USAID) selected the university to lead a five-year award of up to \$25-million to increase global aid transparency through the creation of the AidData Center for Development Policy.

“Big data” analysis informs a number of emerging collaborations. In the past few years the university’s High Speed Performance Computing Team, which provides over 2,600 computing cores and over 120 terabytes of storage, has seen an explosion in the use of its computing capacity. For example, in May 2014, the system provided 28,000 computing hours and by May 2015 that had risen to 1.2 million hours. At VIMS, that capacity has been used to refine storm surge modeling and analysis. The schools of marine science and law are collaborating with Old Dominion University to study likely coastal flooding as sea levels rise and to assess how best to deal with the resulting impacts.

The strategic plan emphasized William & Mary’s role as a leading liberal arts university leveraging its interdisciplinary strengths to explore connections across disciplinary boundaries. Beginning in 2012 the conversation expanded to explore whether or not additional programs in health science or engineering design might strengthen research and help students prepare for careers in those fields. The university explored potential relationships with the Norfolk-based Eastern Virginia Medical School. A 2013 report by the W&M Due Diligence Committee, charged with exploring the opportunities, concluded that the two schools should develop pilot projects in the area of “healthcare delivery science” before considering any potential merger options, noting that significant funding would be needed before any merger would be feasible. Several collaborative grants were subsequently awarded to teams combining researchers at both schools, using funds provided by the Commonwealth and Sentara Healthcare. Some of the research, for example, included work in autism, cognitive decline and accelerating healthcare delivery innovation. In 2014, as part of a broader review of collaborative opportunities, the two schools partnered to create a dual Doctor of Medicine-Master of Business Administration program.

In 2015, the Provost established a committee, co-chaired by Dennis Manos (Vice Provost for Research) and James R. Bradley (Professor of Business), to recommend ways to incorporate “design thinking” into the university’s curriculum. The report, delivered in 2016, noted that while William & Mary should not pursue a full engineering program at this time, there were opportunities to combine engineering and design activities that were already underway into more complete, coherent, comprehensive engineering and design experiences. In particular, the report noted two key opportunities: the integration of engineering “maker” activities with computational models; and, incorporation of emergent approaches that require the integration of science and design with the humanities, arts and business. Initial implementation steps included work on infrastructure (building on 15 distinct “makerspaces” already scattered around the university), data science (linked to work in several areas including AidData) and engineering physics & applied design (a new track within the physics major). One goal was to offer at least some of those courses beginning in the fall of 2017 while other courses and programs were being developed.

William & Mary also had an extended discussion about the integration of on-line courses or hybrid courses into the curriculum. In 2012, the Provost established a

Creative Adaptation Fund to encourage innovative cost-saving and revenue-generating proposals to improve the quality of educational programs. Many of the successful programs since then have focused on eLearning, including blended approaches to entrepreneurial ventures, virtual chemistry labs, interactive modules to complement lectures in introductory economics courses, the use of on-line courses to meet prerequisites in graduate business programs, an on-line course on design thinking for K-12 educators and a summer professional development program for faculty interested in exploring eLearning. In 2015 the Mason School of Business launched an online MBA program with an entirely new curriculum developed around the theme of “Renaissance Thinker, Revolutionary Leader.” The program, administered through a partnership with higher education online service provider Everspring, Inc., fosters robust interaction among students and faculty through a required on-campus residency and a customized mobile app that allows students to work anytime, anywhere. The School of Education is exploring the launch of similar programs.

### Global Connections and Perspectives

Progress in the academic realm featured interrelated advances in interdisciplinary collaboration and global connections. New international partnerships, expansion in study abroad and increases in the level and diversity of international enrollment all contributed to William & Mary’s selection as one of only four universities to receive the 2016 Senator Paul Simon Award for Comprehensive Internationalization from NAFSA: Association of International Educators, a non-profit with 10,000 members from more than 3,500 institutions in over 150 countries.

That award followed several milestones in global education for William & Mary. In several years the school led all public universities in the percent of undergraduates participating in overseas study before graduation. Over half of W&M undergraduates have that experience, including more than 750 students each year in over 50 countries. Since 2008, the university has tripled the number of its international students, with more than 800 students and scholars from over 65 countries.

The number and scope of partnerships aimed at promoting international collaboration has also expanded. In 2010, William & Mary established faculty, student and cultural exchanges with the University of Electronic and Science Technology of China. In 2011, the Law School’s Property Rights Project hosted a conference on that topic at Tsinghua University in Beijing. That same year, the first students entered a new joint degree program between William & Mary and the University of St. Andrews in Scotland, splitting their four years between the two schools. In 2015, the first cohort of 22 students graduated, earning a bachelor of arts (international honours) with the insignia of both institutions. In 2012, William & Mary opened a Confucius Institute on campus, a partnership with Beijing Normal University and the Office of Chinese Language Council International, which includes Chinese culture classes and teacher training among other programs. Also in 2012, the

university joined the Presidential Precinct, a partnership of William & Mary, the University of Virginia, Morven, Jefferson's Monticello, Madison's Montpelier and Monroe's Highland to offer resources to citizens and leaders of democracies and civil societies around the world. In 2013, a W&M delegation led by President Reveley visited some of the university's most important partners in Beijing, Chengdu and Shanghai, spurring growing ties with Chinese universities.

Those international exchanges directly support the growing internationalization of the curriculum. Under the new COLL undergraduate curriculum, all undergraduates must take COLL 300 coursework, typically in the third year, which engages global and cross-cultural perspectives. That requirement can be met in several formats including study abroad, a program at the W&M D.C. center focusing on global or cross-cultural issues, or designated campus courses organized around lectures by university faculty or visiting scholars, artists and public intellectuals. The university's expanding study abroad opportunities, the growing number and diversity of international students, and increasing collaborations with global partners all support the goal of giving every undergraduate a meaningful international and cross-cultural experience. The graduate curriculum also embraced growing global connections. For example, the Public Policy masters program introduced a new international track in 2016, emphasizing international economic development in general and connections to the AidData research in particular. That same year W&M announced creation of its Whole of Government Center of Excellence to provide practical training on interagency collaboration, complex national security and other policy programs and to support research into "Whole of Government" solutions to those challenges.

### Faculty Excellence

The strength of the William & Mary academic experience lies in the close connection between faculty and students, and the core of tenure-track faculty who integrate outstanding teaching and research is essential to sustaining those connections. Clinical Professors, Professors of Practice, Adjunct Professors, Lecturers and other non-tenure-eligible (NTE) faculty bring a range of experience and teaching expertise that enrich the academic program. Over the past decade, the university has done extremely well in recruiting new faculty, gaining recognition for teaching excellence and achieving high levels of research reflected in the grant activity described above. W&M has had a series of discussions about how best to recognize the special contributions of NTE faculty.

William & Mary has consistently ranked among the very top universities for undergraduate teaching. In fact, U.S. News & World Report recently (2015) ranked it as the top public university in the country in that category. In addition to having the lowest student-faculty ratio of any top-ranked public university, nearly half of W&M classes have fewer than 20 students. More faculty at William & Mary have earned the Commonwealth of Virginia's Outstanding Faculty Award, the state's highest teaching honor, than faculty at any other university.

Clearly, the university's faculty model is working, but that model is expensive and William & Mary has been challenged to provide the funds essential to sustain it. The competitiveness of faculty salaries has been a particular concern. The State Council of Higher Education for Virginia (SVHEV) compares salaries at public universities in the state with a peer group of 25 public and private universities selected for each school. The goal is to have salaries at the 60<sup>th</sup> percentile of the peer group. Over the past decade, William & Mary's salaries have fallen far below that target level. For example, in academic year 2013-2014, using data collected by the Integrated Postsecondary Education Data System (IPEDS), the university ranked at the 40<sup>th</sup> percentile and in 2014-2015 it was at the 44<sup>th</sup> percentile. As noted below in the finance discussion, the university has made a significant effort to address that shortfall by providing pools for faculty salary increases distributed based on faculty merit evaluations.

In 2011, the Board of Visitors began an exploration of how teaching loads might be adjusted, considering variations in the balance of teaching and research for some tenure faculty, rebalancing the number of tenure-eligible and NTE faculty and integrating NTE faculty more fully into the life of the campus community. Board member Robert Scott (former law professor at William & Mary, former dean at the University of Virginia Law School and currently a law professor at Columbia University School of Law) led a series of discussions on that topic with the Provost, faculty and other board members. Subsequently, the number of NTE faculty has expanded and they have been more fully integrated into faculty organizations with increased participation in virtually all forms of governance, longer-term contracts, and eligibility for various awards and emeritus status.

### Financial Progress

The faculty salary challenge was the tip of the iceberg of a much deeper financial challenge. U.S. News & World Report rankings for national universities illustrate the problem. In academic year 2007-2008, William & Mary ranked 32<sup>nd</sup> in overall performance and 111<sup>th</sup> in financial resources, a gap of 79 that far exceeded that of any other university ranked in the top 50. The rankings for 2015-2016 were virtually identical – 112<sup>th</sup> in financial resources and tied for 32<sup>nd</sup> in performance, a gap of 80. U.S. News & World Report explored the gap between finances and performance in a January 2015 article and concluded that William & Mary operated more efficiently than any other top-50 national university and was fifth overall for all national universities.

On the one hand, those figures reflect amazing productivity, perhaps making William & Mary the most productive university in the country. But there were considerable risks to sustaining excellence in the face of low faculty and staff salaries and continuing declines in state support. Unfortunately, public universities have had to adjust to a secular decline in the level of state support for higher education driven



by competing demands for state funds from such areas as federal mandates, transportation, K-12 education. When President Reveley took office, one of his very first steps was to insist on a square recognition of the financial challenge and the reality of declining state support.

In 2008, he reminded the university community that over the last generation, taxpayer support for William & Mary had declined from 43% of the operating budget to 13%. He noted that the trend was not likely to reverse, given the enormous demands on state revenue going forward. He did not realize then that the challenge was even greater than he had imagined, as the economy began to sink deeper into the Great Recession.

He emphasized that the path to a different financial trajectory rested on what he described as the “Four P’s” – public funds to the extent they were available, philanthropic support at new levels, productivity not from working harder but working smarter, and private earned tuition from students who benefit from the extraordinary education the university provides (with need-based aid for students who qualify for it). His message was that everyone had to contribute – alumni and friends through philanthropy, faculty and staff through productivity gains, and students and parents through tuition. It would take everyone pulling together to build a sustainable financial foundation, and it was crucial that faculty and staff, alumni and friends, as well as students and their families be confident they were not pulling alone.

The call for greater “productivity” on campus drew a backlash, particularly from faculty who felt they were already working very hard, achieving great results and getting compensation far below the SCHEV 60<sup>th</sup> percentile target. It took a while to calm this storm, with greater emphasis on how systems might be improved to let everyone work smarter, “creative adaptation” and reallocating gains to get compensation closer to market levels, as mentioned earlier. In 2011, President Reveley asked the VP for Strategic Initiatives to coordinate a campus-wide effort to identify new efficiencies and net revenue, an effort that launched over 50 projects and achieved over \$1.5 million per year in baseline additional savings and new net revenues in both fiscal years 2011-2012 and 2012-2013. In 2012, the Provost launched the \$200,000 per year Creative Adaptation Fund, mentioned earlier, to encourage innovative projects that increase the quality of the academic program and also either lower costs or raise new net revenues. Also in 2012, the Provost asked deans to reduce costs or increase new net revenues by a total of at least five percent of the fiscal year 2011-2012 budget over the three year period ending in fiscal year 2014-2015, so that the funds could be reallocated to priorities including higher salaries. The emphasis on reallocation in all of those efforts generated significant support across campus.

Those productivity efforts and the initiatives to increase pride across the university laid the foundation for a more fundamental assessment of how to improve the university’s financial trajectory even more significantly. One of the major

initiatives flowing from the strategic plan, with strong leadership from the Board of Visitors, was a new operating model to sustain the university's excellence and secure the future of Virginia's distinctive Public Ivy. The operating model, known as "The William & Mary Promise" was adopted by the Board in April 2013 and updated each subsequent year. The model provided vitally needed resources while markedly enhancing affordability and access for Virginia undergraduate students who qualify for financial aid. The central challenge was that as state funds declined, in-state tuition was set well below levels required to cover the costs of the high quality programs W&M provided. Out-of-state tuition was much higher, but the Commonwealth mandated that the enrollment of undergraduate out-of-state students had to stay below 35 percent of the total. Out-of-state tuition was already set at market levels and enrollment was at the limit, so there was little room to increase tuition funds on that front. In-state tuition had to be set at a more realistic level, even though this entailed large percentage and dollar increases at a time when such increases were political anathema. So the increase had to be part of a carefully crafted package. Key elements of the model included very modest tuition increases for in-state students already enrolled at the time the Promise was adopted, a four-year fixed-price tuition guarantee for in-state students paying the heightened tuition, and increased affordability for low and middle-income families thanks to greatly increased need-based financial aid for in-state students. The Promise also recognized the need for expanded university efforts in the areas of philanthropy and efficiency. The effect of the re-set of in-state tuition was a stream of revenue that kept growing so long as the graduating classes were paying much less than the incoming classes. The Promise was a vital, bold step, carefully crafted and carefully rolled out, and it was step no other university in the country had taken at that time. Without it William & Mary would not have been able to sustain the high quality of its programs and its distinguished Public Ivy standing.

Each year, the Board of Visitors establishes a tuition for in-state undergraduate students that remains constant over each of their four years at the university, so students and their families can make an informed decision about coming to William & Mary and planning their finances. That model is in sharp contrast to virtually all other universities, which adjust tuition for all students, entering and returning, each year. The level of financial aid is also set so that the "net tuition" is lower for Virginia middle-class families, as defined by the state's Higher Education Advisory Committee, than it was in the 2013 base year. More than 70 percent of Virginia households qualify as "middle income" under that definition. The composition of financial aid is also adjusted so that the loan burden is reduced, by up to \$8,000 from the 2013 base, for middle-income in-state undergraduate students who have demonstrated financial need.

The Promise also made commitments including increased in-state enrollment, merit-based faculty salary increases, enhanced efficiency and productivity, greater philanthropic support and net increases in tuition revenues. William & Mary committed to increase enrollment by 150 in-state students over four years, which, in addition to an earlier commitment to expand by 150 and other growth in total

enrollment, combined to contribute an eight percent increase in in-state enrollment since 2010. The Promise pledged to increase faculty compensation based on merit to the level recommended in the Commonwealth's landmark education law known as TJ21 (the 60<sup>th</sup> percentile of the university's state-selected peer group), to keep classes small and interactive and to increase even further faculty engagement in instruction. In pursuing the Promise, the university implemented dramatic changes in its fundraising efforts and launched a major initiative to increase innovation and productivity in its administrative processes.

Changes on the philanthropic front included the 2014 merger of the development and alumni affairs staff into a new University Advancement organization led by VP Matthew Lambert, as noted in the earlier section on building pride. The Alumni Association remained an independent organization separate from the university, and alumni still elect the independent Alumni Association Board of Directors. The new organization offered some cost savings, but the key goal was to improve coordination of alumni engagement, philanthropy, annual giving, and university marketing and alumni communications. The creation of the new organization required extended discussion and coordination with the Alumni Association Board and the various university entities involved, and all parties recognized the political risks in such an organizational change, but the Alumni Association Board and President Reveley persevered. The Promise and the anticipation of a new fundraising campaign helped all involved push through the short-term organizational restructuring challenges to produce the new Advancement organization.

Advancement adopted a strategy informed by more emphasis on new data analytic techniques. Recognizing the regional concentration of alumni in Virginia, Washington, D.C., New York, Chicago and California, the new organization focused efforts on events and organizations in those areas. New offices were opened in New York, D.C. and California to provide "on the ground" development and alumni officers. The effect has been dramatic in terms of W&M's capacity to reach potential donors and grow alumni activities and presence in those key places. That level of progress could not have been achieved operating simply from Williamsburg. Outreach to alumni has grown dramatically in its range and caliber. A careful review of alumni engagement and giving potential encouraged the staff in considering and ultimately recommending aggressive goals for the fundraising campaign that was publicly launched in the fall of 2015.

The "For the Bold" campaign set very aggressive stretch goals for total fundraising, undergraduate alumni participation and engagement. The selection of the campaign title and the aggressive goals were inspired by new efforts, led by the Board of Visitors and President Reveley, to change dramatically the way William & Mary thought about itself and to alter significantly its financial trajectory. The development of the campaign case statement underscored William & Mary's historic record of bold leadership and the dramatic changes proposed in the Promise. The campaign framework rested on three pillars developed to focus on areas of greatest

need for private support – *Where Great Minds Meet, Making the Remarkable and Passion for Impact*. In particular, the campaign goals reflected a commitment to make sure that the university remained accessible regardless of need by providing substantial increases in financial aid.

The commitment to a fundraising goal of \$1 billion was indeed bold. The prior fundraising campaign from 2000 to 2007 raised just over \$500 million. William & Mary became the smallest public university in the nation to embark on a billion dollar campaign. At the Sunken Garden launch in the fall of 2015, the campaign chair, Sue Hanna Gerdelman ('76) announced the receipt of an anonymous campaign commitment of \$50 million, the largest ever received by the university, and total commitments made in the quiet phase of the campaign of \$532 million. At the launch, the For the Bold campaign was already at the halfway mark and the commitments exceeded the totals from the prior campaign. Less than nine months later in July 2016, the team reported raising an unprecedented \$143 million in a single fiscal year. As noted earlier, by the end of calendar 2016 total campaign commitments had well exceeded \$600 million.

The goal of reaching annual undergraduate alumni participation of 40 percent per year was even bolder. In 2008, participation so measured was 22%, at the campaign launch it stood at 27% and for fiscal year 2016 it was 29% with over 18,000 undergraduate alumni giving that year. That performance solidified William & Mary's position as the top nationally-ranked public university in the U.S for undergraduate alumni participation. Moving up to 40 percent would put William & Mary in an elite group with the top four nationally ranked universities, private schools that have enormously loyal donor bases. In pursuit of that goal, the Advancement team established a class ambassadors program, widely considered a national model for annual alumni-to-alumni engagement, which in fiscal year 2016 saw over 800 class ambassadors engaging over 7,000 classmates. The Alumni Association also expanded its engagement opportunities, including regional events, alumni career and counseling services, outreach to students and young alumni, expanded communications featuring social media and new emphasis on outreach to women, anticipating the 2018 one-hundredth anniversary of the admission of women to William & Mary. In fiscal year 2016, over 1,300 alumni and friends attended the inaugural W&M Weekend in Washington, D.C., over 2,000 attended professional networking events and over 3,700 attended homecoming events on campus.

As tuition was reset and fundraising efforts expanded, it was vitally important to demonstrate that the university took seriously its responsibility to make sure every dollar was spent wisely. In December 2013, President Reveley sent a message to campus launching a business innovation initiative to reinforce a climate of innovation, including a careful review of operating systems against best practices. The university already had a record of achieving great results with limited resources, so the goal was not to work harder, but to identify systematic changes that would allow employees to work smarter, in order to move resources toward higher priorities. Cost-reduction was a priority, but so was the creation of an innovative climate that would encourage

changes to increase effectiveness. Business innovation was to be not a short-term project, but a continuing part of the university's culture.

The Provost and the Vice President for Strategic Initiatives co-chaired a steering committee – including faculty, administrators, a student and two members of the Board of Visitors – to guide the business innovation effort. In 2014 the university engaged a consulting firm, Censeo, to identify major opportunities. Also, in fall 2014 the committee launched a campus-wide organizational review to learn more about what people saw as barriers to their effectiveness and to foster long-term thinking about organizational structure. Based on those reviews, the committee launched several initial projects aimed at reducing baseline costs by at least \$5 million per year by fiscal year 2020. The projects are on track to achieve over \$4.7 million in annual reductions by the end of fiscal year 2018.

The major systemic changes and cost savings thus far have been in procurement, information technology and organizational design. Pooling purchases across the university produced substantial savings, but the productivity review noted that even greater savings could be achieved by pooling purchases with other Virginia universities. William & Mary was already a member of the Virginia Association of State College & University Purchasing Professionals (VASCUPP), which allowed universities to use contracts that had already been negotiated by other member organizations. But just using existing contracts missed the opportunity to take advantage of the pooled power of several universities negotiating the contracts together. William & Mary led the way in the fall of 2014 working with the University of Virginia, Virginia Tech and Virginia Commonwealth University to form the new Virginia Higher Education Procurement Cooperative (VHEPC), which now includes eleven higher education institutions and the Virginia Community College System. Contracts can now be negotiated in concert. Vendors gain from the volume and simplicity of the contracts, and the cooperative members gain from better pricing and service.

The Information Technology organization was an early campus leader in the productivity initiative. After developing a baseline of the university's IT organization, infrastructure and expenditures, the team identified opportunities and implemented changes to better align IT with W&M's business process objectives, reduce duplication of IT services, eliminate redundant infrastructure (data centers, hardware, software) and clarify strategic directions for the university. After a review of plans in several organizations to implement separate constituent relationship management (CRM) systems, William & Mary launched in 2015 a comprehensive university-wide CRM deployment to reduce or eliminate the need to migrate student and alumni information across different communication systems. The campus-wide management of contracts and implementation will ensure consistency and reduce future costs that would have emerged in trying to make disparate systems communicate with each other.

The business innovation team identified substantial savings that could be achieved through organizational designs that reduced management layers and achieved greater centralization of some services. The team also recognized that such reorganizations were disruptive, and the potential gains had to be balanced against the pain. Like most universities, surveys showed that William & Mary has many people who have multiple tasks and some people in management positions with few direct reports. Organizational adjustments that address those issues have produced benefits elsewhere, but we did not know whether or not those adjustments would help W&M. Separate pilot studies in two of our larger organizations, Advancement and the School of Business, were done to test for the concept. Those pilots showed promise, and the business innovation team extended the review (job responsibilities and reporting structure) to other parts of the university, with emphasis on human resources, finance and general administrative support, to see whether these organizational adjustments might have broader applicability. The business innovation team is still considering potential future steps in this area. Work also continues on initiatives in the areas of human resources management, expanded IT cloud migration, more use of the small purchase card, licensed merchandise sales, conference and event management, energy-use policies and other sustainability projects.

In the academic area, the Provost led initiatives in two areas: the generation of net new revenues aside from tuition changes in current programs, and rebalancing in faculty structure to expand fully instructional faculty positions. As previously mentioned, William & Mary and the University of St Andrews launched an international undergraduate joint degree program in 2011, with the initial cohort of 23 students graduating in 2015. The Mason School of Business launched an on-line MBA program in FY 2016, and net new revenues there are expected to be well over \$2 million per year by FY 2018. The Masters in Business Analytics program, launched in FY 2017, is expanding rapidly and should add over \$.5 million in net revenues within two years. The public policy program launched a Masters of Public Policy international track that is expected to add net new revenues by FY 2018.

As part of the Promise initiative, the Provost tracked several academic quality and productivity metrics including the following: attraction and retention of outstanding faculty; instruction by full-time faculty; ratio of tenured and tenure eligible faculty to fully instructional faculty; quality of incoming students; undergraduate retention and graduation rates; graduate school acceptance and major awards; employment success; optimized class enrollment management and efficient use of physical facilities; and the share of the total W&M budget devoted to academic instruction, related support programs and research. From 2014 to 2016, several adjustments were made in rebalancing teaching and research (14 faculty positions) and reclassifications of positions to fully instructional faculty (nine positions in Arts and Sciences with recurring annual savings of \$800,000).

In sum, the Promise delivered a substantial improvement in William & Mary's financial trajectory, increasing revenues, expanding a culture of productivity and

reinvigorating philanthropy, while moving resources to the high-priority strategic goals. William & Mary has been able to expand financial aid to in-state students, lowering the net tuition for in-state students with recognized need into the middle-class and reducing their loan burden. The university has not yet been able to reach the goal of faculty salaries at the 60<sup>th</sup> percentile of the peer group, but it has made substantial progress in that direction and the prospects for attracting and retaining outstanding faculty and staff have significantly improved.

### Infrastructure Progress

William & Mary has one of the most historic and most beautiful campuses in the country. Maintaining that beauty while modernizing to keep facilities efficient and appropriate to current education and research needs is a continuing challenge. The transformation of the physical campus since 2008 has been staggering, but the beauty has been preserved. The fact that so much construction was completed with great sensitivity to tradition and sustainability is particularly impressive and a tribute to all those involved in the effort.

The physical transformation has been one of the greatest if not the greatest in W&M's storied history, touching each of its five schools. From 2008 to 2018 over 1.5 million square feet (SF) will have been built or renewed on main campus, roughly 40 percent of building space there. At VIMS, fully 50 percent of building space will have been built or renewed. Enclosure 2 provides a chronology of the major changes in that period. The projects were completed, or are on schedule for completion, on time, on budget and to high standards. That performance is a tribute to Vice President Anna Martin, who retired in 2015, Senior Vice President Sam Jones, who then assumed expanded responsibilities in that area, and their extraordinary staffs.

Several projects have dramatically increased our capacity for scientific research and education. The Virginia Institute of Marine Science (VIMS) campus added a 71,000 SF scientific research building and a separate 46,000 SF seawater research laboratory in 2008. A new 32,000 SF research support facility and a 93-foot research vessel are scheduled for completion in 2018. VIMS added a seawater laboratory and science building on its Wachapreague campus in 2012. On the main W&M campus, Small Hall, the home of the Physics Department, was renovated and expanded in two phases in 2008 and 2010, updating 65,500 SF of research, classroom and office space. Most impressive, the Integrated Science Center, discussed earlier, opened in three phases with 121,000 SF in 2008, 46,000 SF in 2009, and 113,000 SF in the fall of 2016. The facility supports scientific research in applied science, biology, chemistry, psychology and computer modeling, encouraging collaborations across those disciplines and interdisciplinary programs.

In addition to the ISC complex, perhaps the most visible transformations of the campus were the new Alan B. Miller Hall for the Mason School of Business on Ukrop Way and the new School of Education building at the site of the former Sentara Williamsburg Community Hospital on Monticello Avenue. Miller Hall, which opened

in 2009, provides 160,000 SF of high tech classrooms, offices and meeting spaces in a magnificent architectural design. One wing houses the undergraduate business program and the other is for graduate programs. The new 109,000 SF School of Education building opened in 2010 on a 25-acre addition to campus linked to main campus by a wooded pedestrian pathway. The site has expanded parking and easy access for commuter students in the graduate programs, reducing congestion on main campus. Both buildings earned LEED gold certification from the U.S. Green Building Council. Less visible, but vitally important interior changes totaling 96,000 SF were made to Andrews Hall (Art and Art History) in 2011, Tucker Hall (English) in 2013 and Tyler Hall (changed from Business to Economics, Government, International Relations and Public Policy) in 2016. The School of Law has also enjoyed a major physical transformation in recent years. Since 2000 the Law School has more than doubled its square feet, including the North Wing (2002), Wolf Law Library (2007), an annex for admissions, a new dining facility, and classroom renovations. In 2017, the James A. and Robin L. Hixon Center for Experiential Learning and Leadership added 12,000 SF to the Law School and houses its nine clinics.

The transformation of student residences was just as striking, addressing long-deferred maintenance, significantly improving HVAC systems, providing new housing alternatives and extending the campus perimeter. In 2011, the William & Mary Real Estate Foundation built Tribe Square on Richmond Road across from Blow Hall, with retail space on the first floor and student residences (14 apartments with space for 56 students) leased by the university on the upper two floors. In 2013, ten new fraternity houses (81,000 SF with 187 beds) and a community building opened across from William & Mary Hall. That same year the university purchased the Williamsburg Hospitality House (3.6 acres, 318 rooms, 370 parking spaces) across from the football stadium on Richmond Road, extending the campus footprint. The purchase, a major accomplishment after several years of overtures, was part of a strategic effort to expand the campus footprint and create space for future options. Conversion of that 335,000 SF of building space into student residences began immediately, and the first students moved in that fall. The additional swing space made it possible to launch a systematic renovation of other residence halls, including the full interior and exterior of the 151-bed Chandler Hall (51,000 SF) in 2015 and renovations to Landrum Hall scheduled for completion in 2017. In 2016, the Real Estate Foundation agreed to purchase the Days Inn (102 rooms, 38,600 SF building on 1.6 acres) adjacent to the campus on Richmond Road, and rezoning for use as student housing was approved in 2017. The university plans to lease the property for use as student residences, which will provide additional swing space for the renovation of residences on campus. Tribe Square, One Tribe Place and the Days Inn property all extend the campus perimeter, keep student residences in easy walking distance and reduce the pressure to develop open spaces on campus. The HVAC improvements to existing residences will reduce energy costs and enhance sustainability efforts.

New facilities also came on line to support other dimensions of student life. The Sherman and Gloria H. Cohen Career Center (11,000 SF) nestled between the Sadler Center and Zable Stadium opened in 2010, providing new career development



space for reception, presentation, recruitment and staff offices. In 2013, the dining hall in the Sadler Center was renovated and expanded, adding 300 dining seats, a late-night lounge and a completely renovated kitchen. The McLeod Tyler Wellness Center, located behind the Sadler Center, scheduled for completion in 2017 will house the Student Health Center, the Counseling Center, Health Promotion, the wellness components of Campus Recreation and a new Center for Mindfulness and Authentic Excellence. Taken together, those facilities make the Sadler Center area a focal point for key student services.

The nearby Zable Stadium has also been transformed (91,000 SF of new space and 18,000 SF of renovation), particularly on the west side with the new Smith-McGlothlin stands that opened in 2016. The dramatic changes include a grand entrance, upper deck, 10 luxury boxes, and a new press box. The architecture complements the adjacent Jimmy Laycock Football Center (27,000 SF) completed in 2008 with a team locker room, training rooms and coaches' offices. Other additions to athletic facilities include the Martin Family Stadium for soccer and lacrosse (1,000 seat bleacher, press box, team rooms), which opened in 2011. The stadium is next to the Plumeri Baseball Field on Ironbound Road, which was enhanced in 2016 with the addition of the 5,500 SF Joe Plumeri Indoor Practice Facility.

Those additions to our facilities have dramatically increased our capacity in the sciences, brought new life to our professional schools, moved several of our humanities and social science groups into space that supports more collaboration, enriched student life and done wonders for several athletic programs. Major legislative successes now permit funding for two particularly vital projects. Phase 4 of the Integrated Science Center will now go forward on the site of the recently demolished Millington Hall, completing the interdisciplinary science complex. Long-awaited improvements in the Arts Quarter are also funded and on track for completion in the 2020 time frame with 152,000 SF of new space and 32,000 SF in renovation. Those desperately needed improvements will be a boon to a vital part of our academic programs. Major expansions in the Muscarelle Museum of Art and the Alumni House are also on the horizon. The Museum has set records with a series of extraordinary world-class Michelangelo, Da Vinci and Botticelli exhibits, and it needs space of equal quality. Alumni engagement is a top priority, and the envisioned expansion and renovation are vitally needed to support those efforts.

The preservation of the beauty of the historic campus has also been a priority, although it was a challenge to complete the construction, related utility projects and careful archeological work without disruption. The President and the Provost and their staffs moved to James Blair Hall while the Brafferton was meticulously renovated (2013), introducing modern HVAC systems and strengthening its aging bones while preserving its historic character. At the same time a major utility project begun in 2009 reached conclusion, including improvements to the heating plant and new lines to distribute steam and chilled water to 27 buildings including the Historic Campus. After those projects, there was a major effort to beautify the grounds and revitalize the Wren Yard.

The renovations to buildings and utilities were all done with a careful eye to the sustainability of the campus. In 2008 William & Mary's national sustainability rankings were low and a number of students and faculty were concerned. In April that year, soon after President Reveley took office, undergraduate students voted to pay a "green fee" to support sustainability projects. President Reveley established a Committee on Sustainability in the fall of 2008. In early 2009, the evolving William & Mary strategic plan highlighted the importance of integrating sustainability into the life of the university. Subsequent actions included the launch of a recycling program, development of a student "EcoAmbassador" program and initiation of monthly open sustainability forums. In 2014 an Office of Sustainability headed by a full-time director was established under the Vice President for Strategic Initiatives. In 2016 that office created a "Green to Gold Fund" as a revolving fund to finance projects that reduce the university's impact on the environment and improve efficiency in ways that create measurable returns on investment, for example by investing in more efficient lighting that reduces energy costs over time. William & Mary is now recognized as one of the top "green" colleges in the country.

In 2013 President Reveley established a steering committee to produce a master plan to guide future campus development over the next few decades. The resulting Master Plan 2015 drew on input from nine working groups including faculty, students, administrators and staff. The groups examined academic space, student life and auxiliary space, athletics and recreation space, architecture design and standards, administrative space, infrastructure and utilities, land use, landscape and ecology, parking and transportation and residential housing. Several elements of the plan – ISC3, development of the Arts Complex, creation of a new Integrative Wellness Center, revitalization of Zable Stadium – are already completed or underway. Planning for ISC4 is well underway. Other elements – further classroom innovation and renovation, an academic building on south campus to replace aging Jones and Morton Halls, development of additional recreational fields and athletic facilities, consolidation of administrative offices in a new facility replacing the Campus Center, continuing renovation of student residences, and more – all remain to be considered as William & Mary continues to blend its history and ambitions.

### Sustaining the Progress

William & Mary has made great progress, but much more needs to be done to sustain the momentum that has been developed to expand its national prominence and international stature. The university has long been recognized for its academic excellence and there are several opportunities to expand on that strong foundation. At the moment, there are no plans for a school of engineering, but there are excellent opportunities for new programs around engineering design drawing on interdisciplinary strengths in the sciences and related fields. William & Mary has had wonderful success in developing leaders in a wide variety of fields, but there are opportunities to take a more structured approach to the integration of academic work

and practical experience in creating innovative approaches to leadership. The public policy sphere holds particular promise in that regard. The recent development of an international track in that graduate program, and expanded emphasis on the exploration of complex public policy issues from interdisciplinary, interagency and international perspectives, suggests the potential for William & Mary to create a real competitive advantage in that realm. International programs in general are on a roll, and that momentum must be sustained.

Despite extensive exploration in the past decade, and important strides through the Schroeder Center for Health Policy, the university has not yet found a way to have a significant teaching and research foothold in health care. All agree that sector will continue to expand with significant employment opportunities for our graduates. William & Mary has the capacity to participate through scientific advances, the exploration of related ethical issues and the economic, political and regulatory dimensions of health services. Expanded participation in this sector will require significant investment and strong partners.

The university has moved cautiously into distance education, with an initial foray in business administration. There has been substantial experimentation with the integration of new technologies into courses, but the traditional emphasis on close interaction with a professor in small classes remains part of the William & Mary experience. Nonetheless there are several areas, the School of Education for example, where expanded on-line initiatives show particular promise. Similarly, the university has not developed an integrated approach to continuing education, relying on the independent initiatives of each school. William & Mary will have to explore how best to sustain the extraordinary excellence of its on-campus programs while extending its reach to serve other populations.

The university has made great progress in its communication efforts and building pride in William & Mary, but even more progress is needed in gaining recognition as a university, a serious research university. William & Mary's brand as the "College" is strong, stretching from the royal charter itself through a beloved connection with alumni, particularly older alumni. The university will continue to celebrate the extraordinary liberal arts college at its core. But William & Mary must also make it clear to others, and to itself, that it has been a university since 1779, that it is the home of outstanding graduate and professional programs, that it is pushing boundaries through exceptional research and that it has national and international stature as a research university.

People are the heart of any university, and William & Mary has done an excellent job in attracting and retaining great students, faculty and staff. It attracts, retains and graduates students at high rates, particularly for a public university, but it has the potential to do even more on those fronts, moving into the top echelon of its private university peers. William & Mary also needs to increase affordability for strong students regardless of financial need. The Promise has increased access for in-state students, but much more must be done in improving access for out-of-state

students. The Promise has also helped provide funds to keep faculty and staff salaries somewhat competitive, although the goal of having faculty salaries reach the 60<sup>th</sup> percentile of the university's peer group has not yet been reached.

Successful completion of the "For the Bold" campaign is essential. Great progress has been made on the goals for expanded alumni engagement, increased undergraduate alumni annual giving and the \$1 billion target. The university has made a significant investment in the Advancement organization, and so far that seems to be paying off. But William & Mary is still years from reaching its bold goals and exceptional performance down the stretch will be vital to ultimate success.

The renovation of the campus has been dramatic and heartening, lifting spirits, expanding the capacity for teaching, research and collaboration and significantly improving student life. But challenges remain. Sorority Court needs renovation and funds for grounds and facilities maintenance are inadequate. Several projects on the near horizon have great promise – the Arts Complex, ISC4, the Alumni House, and the Muscarelle Museum – but those projects have yet to be completed, and there will be inevitable bumps along the way. Then there will be the challenge of developing a new academic building to replace Jones and Morton Halls, which have already served beyond their effective lives.

Success at a university, as in most human endeavors, depends on able leadership. Over the past decade, William & Mary has had a strong president who was able to work smoothly and persuasively with the Board of Visitors, to recruit exceptional senior administrators, and to provide a context in which others could do their best work. Campus leaders with academic and administrative responsibilities worked together seamlessly, creatively and collegially. They had a common vision and the courage to pursue it boldly, even when that entailed risk. They led strongly and effectively, and the progress has been commensurate. W&M's continued success will hinge on the ability to keep recruiting and fielding a compelling group of campus leaders and to provide a climate in which they can excel. That continued success will also depend on uniting all its various constituencies in support of the Alma Mater of the Nation. Over the past decade the university was blessed by strong leadership and collaboration across the Board of Visitors, the Foundation Board and the Alumni Association Board, and by extraordinary support from its two Chancellors. Those relationships take effort and they must be constantly nurtured. Unity of purpose will be essential if William & Mary is to continue to expand its national prominence and international stature.

**Enclosures:**

1. People (2008-2018)
2. Campus Transformation (2008-2018)
3. Selected William & Mary News and Website References

## Enclosure 1. People (2008-2018)

- Chancellors
  - 23<sup>rd</sup> Chancellor – Sandra Day O’Connor, retired Supreme Court Associate Justice (2006-2012)
  - 24<sup>th</sup> Chancellor – Robert M. Gates ’65, L.H.D. ’98, former Secretary of Defense under two presidents (2012- )
- Board of Visitors Rectors
  - Michael K. Powell ’85 (2007-2009)
  - Henry C. Wolfe ’64, J.D. ’66 (2009-2011)
  - Jeffrey B. Trammell ’73 (2011-2013)
  - Todd A. Stottlemyer ’85 (2013- )
- President W. Taylor Reveley, III (2008- )
- Provosts
  - P. Geoffrey Feiss (2003-2009)
  - Michael R. Halleran (2009- )
- Vice Presidents
  - Ginger Ambler – Student Affairs (Interim 2008, VP 2009- )
  - Henry Broaddus – Strategic Initiatives and Public Affairs (2014- )
  - Karen Cottrell – EVP Alumni Association (2005-2014)
  - Terry Driscoll – Athletics (1995-2017)
  - Stewart Gamage – Public Affairs (1993-2008)
  - James R. Golden – Strategic Initiatives (2008-2014): Senior Counselor to President Reveley (2014- )
  - Sam Jones – Finance (1993-2015); Senior VP Finance and Administration (2015- )
  - Matthew T. Lambert – Advancement (2013- )
  - Sean Pieri – Development (2006-2012)
  - Anna Martin – Administration (2001-2015)
  - Sam Sadler – Student Affairs (1989-2008)
- Deans
  - Kate Conley – Arts and Sciences (2012- )
  - Davison M. Douglas – Law (2009- )
  - Virginia McLaughlin – Education (1995-2013)
  - Spencer G. Niles – Education (2013- )
  - Lawrence B. Pulley – Business (1998- )
  - W. Taylor Reveley, III – Law (1998 – February 2008)
  - Carl Strickwerda – Arts and Sciences (2004-2011)
  - John T. Wells – VIMS (2004- )
- Commencement speakers
  - 2017 Walter Isaacson, President and CEO of the Aspen Institute
  - 2016 Jill Ellis ’88, National Women’s Soccer World Cup Champions Team Coach
  - 2015 Condoleeza Rice, Former Secretary of State
  - 2014 Sergeant First Class Leroy Petry, Medal of Honor Winner

- 2013 Robert S. Mueller III, FBI Director
- 2012 Jim Lehrer, TV News Commentator
- 2011 Joseph J. Plumeri '66, Chairman and CEO of Willis Group Holdings
- 2010 Christina Romer '81, chair of the president's Council of Economic Advisers
- 2009 Tom Brokaw, TV News Commentator
- 2008 Mike Tomlin '94, Super Bowl winning coach of the NFL Pittsburgh Steelers
- Charter Day speakers
  - 2009 Senator Jim Webb
  - 2010 Governor Robert F. McDonnell
  - 2011 Eric Cantor, J.D. '88, Majority Leader, House of Representatives
  - 2012 Chancellor Robert M. Gates, '65, L.H.D. '98
  - 2013 Chancellor Robert M. Gates, '65, L.H.D. '98
  - 2014 Governor Terence R. McAuliffe
  - 2015 James B. Murray, Jr., J.D. '74, LL.D. '00, Founder and General Partner, Court Square Ventures
  - 2016 Ellen Stofan '83, Chief Scientist, NASA
  - 2017 Michael Clemons '89, Vice Chair, Toronto Argonauts
  - 2018 Governor of Virginia

## **Enclosure 2. Campus Transformation (2008-2018)**

This chronology of major construction and renovation projects provides rough estimates of the size of each project in gross square feet (GSF) and an estimate of total construction and renovation costs. Those figures, drawn from various sources, are intended to provide a general idea of the scope of the project. Cost figures may not accurately capture all of the various expenditures involved. For more information see:

<http://www.wm.edu/offices/facilities/services/fpdc/construction/completedprojects/admission/index.php>

### **2008**

Jimmye Laycock Football Center. This new construction, adjacent to the northwest corner of Zable Stadium, provided a team locker room, training rooms and coaches' offices. (27,000 new GSF -- \$11.0 million)

Marine Research Building Complex. This VIMS project included the demolition of three outdated laboratory buildings and constructed two new state-of-the-art research buildings: Andrews Hall, a new 71,000 square foot scientific research building, and a separate 46,000 square foot seawater research laboratory. Both buildings were completed in 2008. (117,000 new GSF -- \$31.2 million)

Integrated Science Center 1. ISC1 houses the Departments of Chemistry and Biology. It opened in the summer of 2008 while ISC2 was being completed. The projects were done together but completed in phases. (120,000 new GSF -- \$64.9 for phases 1 and 2)

### **2009**

Integrated Science Center 2. ISC2 sits on the site of the former Rogers Hall, which was completely gutted and transformed into state of the art working space, primarily for the Department of Psychology, but including some space for Biology headquartered in the adjacent ISC1. (46,000 new GSF – See ISC1 above)

Mason School of Business. Alan B. Miller Hall provides high-tech classrooms, offices and meeting spaces. The building opened in August 2009 and received LEED Gold certification from the U.S. Green Building Council. (160,000 new GSF -- \$75.0 million)

Power Plant. Renovation of the 1952 power plant, which provides heating to the old campus, was completed in June 2009. (\$13.6 million)

Concrete Pier. This project replaced two damaged wooden piers with a new concrete pier on the VIMS Gloucester Point shoreline. This pier houses the pumps and intake lines for running seawater to the new Seawater Lab. The pier was completed in 2009. (\$1.5 million)

## **2010**

Career Center. The Sherman and Gloria H. Cohen Career Center, next to Sadler Hall, opened in the fall of 2010, providing new career development space including reception, presentation, recruitment, resource and professional staff areas. (11,000 new GSF -- \$7.9 million)

School of Education. This new facility was constructed on the site of the former Sentara Williamsburg Community Hospital on Monticello Avenue. Staff and faculty moved in the first week of June 2010. A pedestrian pathway connecting the site to main campus opened in August 2010. The building received LEED gold certification from the U.S. Green Building Council. (109,000 new GSF -- \$41.0 million)

Field Support Center. This facility in the Boat Basin of the VIMS Gloucester Point Campus replaced the former vessel operations facilities and field support infrastructure that were severely damaged as a result of Hurricane Isabel. The building was completed in 2010. (10,000 GSF -- \$2.0 million)

Shoreline Erosion Control. This project supported erosion control of the entire shoreline of the VIMS Gloucester Point campus to protect the shoreline and surrounding structures. The project included construction of eleven new rip rap breakwaters, the extension of several pipe outfalls further into the York River, replenishment of sand along the entire shoreline, creation of small dunes along the west shoreline and planting of riparian vegetation on the east shoreline. The project was completed in 2010. (\$1.2 million)

## **2011**

Andrews Hall. The home of the Departments of Art and Art History, built in 1967, was completely renovated with major enhancements to infrastructure, teaching spaces, studio classrooms and office and public spaces. Work was completed in August 2011. (27,000 GSF renovation -- \$3.8 million)

Small Hall. The project renovated the 1964 facility, which houses the Physics Department. Renovation included replacement of HVAC, modification of the electrical system, computer network wiring, technical, security and safety upgrades, replacement of the compressed air system and improved handicapped access. The Phase 1 addition began in 2008, the Phase II renovation began in 2010, and work was completed in May 2011. (65,500 renovated GSF -- \$24.4 million)

Martin Family Stadium. The new stadium for soccer and lacrosse, next to the Plumeri baseball stadium, includes a 1,000-seat pre-engineered bleacher with a brick façade, press box, restrooms and team rooms. The project, completed in April 2011, was designed to support future expansion to a 1,500-seat capacity. (\$3.0 million)



Tribe Square. This three-story building, across the street from Blow Memorial Hall and next to Wawa, opened in the fall of 2011. It is owned by the William & Mary Real Estate Foundation. Tribe Square includes retail space on the first floor and student residences leased by the university on the upper floors. The 14 apartments provide space for 56 upper level students. Each four-bedroom, two-bath apartment consists of private bedrooms with a shared living space.

Research Storage Facility. This VIMS project constructed a facility to secure research equipment and instruments that had been stored outdoors. The project was completed in 2011. (4,600 GSF -- \$640,000)

Wachapreague Campus. In 2011, VIMS purchased two small pieces of property, Hill House and Carlsen House, on its Wachapreague campus. Both houses were converted to visiting scientist housing. (2,600 GSF -- \$330,000)

## **2012**

Eastern Shore Seawater Laboratory. This project supported the construction of a new laboratory building with running seawater for research on coastal marine ecology and aquaculture in a high salinity environment at the VIMS Wachapreague campus. The project was completed in 2012. (8,000 new GSF -- \$3.7 million)

Seaside Hall. This project supported the construction of a new library, classroom, and laboratory building that was completely destroyed by fire on November 18, 2010 at the VIMS Wachapreague campus. This project was completed in 2012. (3,100 GSF -- \$1.2 million)

Gloucester Point Campus. In 2012 and 2013, VIMS purchased two pieces of property contiguous to its Gloucester Point campus – Moxley House and Abrahamson House. The Moxley House is currently being used for storage and the Abrahamson House has been converted to visiting scientist housing. (4,100 SF -- \$488,000)

## **2013**

Brafferton. The building contains the offices of the President and the Provost. The project, including the Brafferton kitchen annex, was completed in July 2013. The work sealed the exterior (roof, windows, foundation) renewed building systems (HVAC, fire, handicapped access) and restored the building fabric. (6,700 GSF renovation -- \$3.4 million)

Fraternity Housing. The project, completed in late summer 2013, constructed ten new fraternity houses (187 beds) and a community building across the street from William & Mary Hall. (81,000 GSF -- \$25.8 million)

Sadler Center Dining Hall. The renovation and expansion of the student center, completed in August 2013, added 300 dining seats, a late night lounge, and a completely renovated kitchen. (7,200 renovated and 11,800 new GSF -- \$8.0 million)

Tucker Hall. Instructional space and technology were modernized for the Department of English. (26,000 renovated GSF -- \$11.5 million)

Historic Campus Utility Project. In Phase I a cooling addition to the south wall of the heating plant was constructed to house up to four 900-ton chiller units and an ice plant. In Phase II, new lines were installed to distribute steam from the Power Plant and chilled water to 11 of the 27 buildings on the Historic Campus and south of Jamestown Road. In Phase III distribution reached all 27 buildings. The projects began in October 2009 and ended in August of 2013. (\$22.3 million)

One Tribe Place. In 2013, the university purchased the Williamsburg Hospitality House hotel on Richmond Road across from the football stadium, and began conversion of the space into student residences. The hotel sat on 3.6 acres and included 318 rooms, 20,000-square-feet in conference space, two restaurants and 370 parking spaces.

Murray House. 1693 Scholars Program found a home (2013) at the renovated house at 101 Chandler Court, now known as the Murray House in honor of donors Jim and Bruce Murray.

## **2015**

Chandler Hall. A full interior and exterior renovation of the 151-bed Chandler Hall student residence, including roof replacement, window replacement, building systems replacement, and interior finishes was completed in July 2015. (51,000 renovated GSF -- \$10.5 million)

## **2016**

ISC Phase 3. In fall 2016, the university dedicated the four-story Integrated Science Center 3, the third phase of William & Mary's state-of-the-art science complex. The facility is designed for scientific research in existing applications (applied science, biology, chemistry, and psychology), future inter-disciplinary programs (STEM), and computer modeling. (113,000 new GSF -- \$74 million)

Tyler Hall. The project reconfigured and improved Tyler Hall, last upgraded in 1980. Economics, government, international relations and public policy are all now housed in the same space. The renovation added almost 7,000 square feet to the building by converting the fourth-floor attic to offices. It also updated the building's infrastructure, deploying cost-saving energy connected to the central plant, water-saving measures and more flexible IT framework. (36,000 renovated and 7,000 new GSF -- \$16.3 million)

Lemon and Hardy Halls. These residences were renamed in 2016 to honor the contributions made by Lemon, a man enslaved by the College in the 18th century, and Carroll F.S. Hardy, a longtime administrator who made monumental strides in diversity at William & Mary.

Zable Stadium. The dramatic reformation to the football stadium focused on the west side of the 80-year-old facility, adding 10 luxury boxes, a new press box, concession and bathroom areas and circulation space. After reopening in the fall of 2016, the stadium now features a new grand entrance and upper deck, wider aisles, additional handrails, improved lighting and a new ticketing office. The Smith-McGlothlin west stands have been named for Hunter Jones Smith '51, James W. McGlothlin '62, J.D. '64, LL.D. '00 and Frances G. McGlothlin '66 for their generosity and leadership in the project. (\$28.0 million)

Wachapreague campus. In 2016, VIMS purchased a piece of land contiguous to the Wachapreague campus for use as a drain field to support the future expansion of that campus. (\$27,500)

Joe Plumeri Indoor Baseball Practice Facility. This new construction adjacent to the Plumeri Baseball Field on Ironbound Road provides 5,500 SF of indoor practice space. (\$1.0 million)

**2017** (Completion dates for 2017 and beyond are estimated from current plans.)

Law School Center. Opening in 2017, the James A. and Robin L. Hixon Center for Experiential Learning and Leadership will add 12,000-square feet to the Law School. James A. Hixon is a 1979 graduate of W&M Law School. All nine of the law school's clinics will be located on the first floor, which will feature offices for managing attorneys to meet individually with students enrolled in the clinics, client interview rooms and a multipurpose conference room/clinical classroom. (12,000 new GSF -- \$7.6 million)

Days Inn. In 2016, the William & Mary Real Estate Foundation agreed to purchase the Days Inn located adjacent to the campus on Richmond Road, contingent on rezoning by the City of Williamsburg for use as student housing. The two-story building is approximately 38,600 square feet (plus a 3,800-square-foot basement) and sits on 1.609 acres. It includes 102 guestrooms. The university's plan is to lease the property for use as student housing for upperclassmen to provide swing space so major renovations can occur at other residence halls on campus. Another potential use for the building is for graduate student housing.

**2018**

Integrative Wellness Center. The McLeod Tyler Wellness Center will be located behind the Sadler Center. The Center, named in honor of Bee McLeod '83, M.B.A.'91

and honorary alumnus Goody Tyler, will house the Student Health Center, the Counseling Center, Health Promotion and the wellness components of Campus Recreation. The building will also house a new Center for Mindfulness and Authentic Excellence. Construction began in the fall of 2016 and should be completed in 2018.

Landrum Hall. Comprehensive renovations will begin at Landrum Hall dormitory, located near the Crim Dell Bridge, in May 2017 and last approximately fifteen months. (17.0 million)

VIMS Facilities Management. This project includes the planning and construction of a new 15,000 square-foot building to provide space for the Facilities Management Department, Safety and Environmental Programs, and Shipping, Receiving and Mailroom including administrative offices, trade shops, vehicle repair, grounds, housekeeping and storage. The project has a completion date of Spring 2018. (15,000 GSF -- \$7.1 million)

VIMS Research Facility. This project includes the planning and construction of a new building to provide research, study, office, and technology space in a single facility for the following units: Information Technology, Marine Advisory Services, Virginia Sea Grant, Center for Coastal Resources Management, and the News & Media Center. The project has a completion date of winter 2017-18. (32,000 GSF -- \$13.6 million)

VIMS Research Vessel – This project supports the planning and design of a new research vessel to replace the Bay Eagle – VIMS’ flagship vessel. The construction contract has been awarded to Meridien Maritime Reparation. The ship will be approximately 93 feet in length with a 28-foot beam. It will berth 10 scientists and crew and have an endurance of 10 days at sea. The project has a completion date of spring 2018. (\$10.1 million)

## **2019**

Alumni House. The Alumni Association is raising private funds for renewal and expansion of Alumni House. The concept was presented to the BOV in September 2013. The proposed expansion will create capacity for up to 300 people to gather indoors. A reimagined entrance will feature a welcoming seating and reception area. The construction timeline is to break ground in May 2018 and complete work by Homecoming in the fall of 2019. (11,500 new and 21,000 renovated GSF -- \$19.0 million)

## **2020**

Arts Quarter. Phase 1 will provide about 75,000 square feet of new teaching and performance space for Music, including four classrooms/seminar rooms, 15 teaching studios, 33 practice rooms, 60-person choral and 45-person instrument practice rooms, a 125-seat recital hall and a 450-seat recital hall. Phase 2 will include adaptive

reuse of Phi Beta Kappa Hall for Theater, Speech and Dance, including roughly 109,000 square feet (77,000 new + 32,000 renovation). Key components will be a 60-seat dance recital studio, 100-seat student laboratory, a 250-seat studio theater and a 500-seat renovated main theater. Construction of temporary space will be accomplished during the summer and fall of 2017 in preparation for the start of construction in 2018. Construction of the Music facility (18 months) and PBK renovation (24 months) will occur concurrently. Completion is expected by summer 2020. (152,000 new and 32,000 renovated GSF – \$118 million)

### **After 2020**

Muscarella Museum of Art. Plans for the design and construction of a new arts facility were announced in 2016. The Martha Wren Briggs '55 Center for the Visual Arts will be home to an expansion of the museum and the new Kaplan wing -- named for Jane Thompson Kaplan '56 and Jim Kaplan '57. The center's space will accommodate interactive technology and house world-class exhibitions, an arts teaching center, an auditorium and gathering spaces.

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