



**William & Mary
Athletics**

***A Strategic Review:
Securing the Future***

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Executive Summary

A *Strategic Review: Securing the Future* was developed through a comprehensive process undertaken from January through July of 2018. The strategic thinking, visioning and review process was overseen by *The Strategic Review Working Group*. Members were selected by Athletics Director Samantha K. Huges and included nine William & Mary Athletics staff and a representative from the offices of the President and Provost (see [Appendix 1](#)). To facilitate the strategic review process, W&M Athletics commissioned the services of **The PICTOR Group**, an intercollegiate athletics consulting and executive search firm with extensive experience and expertise in college athletics. **The PICTOR Group** established and followed a thorough process and timeline spanning seven months (see [Appendix 2](#)).

The PICTOR Group facilitators conducted 44 in-person, on campus interviews that included William & Mary senior university administrators and faculty and staff. Alumni community members were also interviewed as well as donors to W&M Athletics. Interviews also included athletics administrators, head coaches, assistant coaches, support staff, and student-athletes.

Feedback was gathered from three distinct groups utilizing an online survey administered to 540 William & Mary student-athletes, 130 Athletics staff and university leadership, and 7,500 external stakeholders. Questions for the survey were developed by **The PICTOR Group** with input from the W&M Athletics Director. Out of 8,130 questionnaires administered, there were 1,429 surveys returned for a 17% response rate. *The Strategic Review Working Group* incorporated this survey feedback, input from the in-person interviews, and a comprehensive situation analysis (SWOT) into its review.

New [Vision, Mission, and Core Values](#) statements for W&M Athletics resulted from the strategic review. The development of these statements was informed by an environmental scan of national trends and the situation analysis, which included financial data and NCAA Institutional Performance Plan (IPP) data from peer groups, including members of the Colonial Athletic Association.

Six [Goals](#) became the primary focus as W&M Athletics turns toward developing a blueprint for the future. Aligning resources with strategic priorities while navigating the ever-changing environment of NCAA Division I athletics will be vital to W&M Athletics' future success.

Findings

Among the findings in the development of *A Strategic Review: Securing the Future* are:

- W&M Athletics is committed to the pursuit of academic excellence by its student-athletes.
- W&M Athletics' current organizational structure of 23 varsity sports and its financial model are not sustainable within its current or foreseeable resources.
- W&M Athletics has been uneven recently in competitive success and has a significant opportunity to improve on the lack of sustained competitive success.
- W&M Athletics appreciates the loyalty and support from its alumni, donors and friends.
- W&M Athletics has opportunities to enhance its gender equity.
- W&M Athletics has revenue-generating opportunities from outside sources.
- W&M Athletics has opportunities to strengthen its three high-profile sports of football and men's and women's basketball.
- W&M Athletics has an opportunity to enhance its practice and competitive athletics facilities and venues.
- W&M Athletics has an opportunity to enhance the student-athlete experience.
- W&M Athletics has a tremendous opportunity to capitalize on the university's campaign, *For the Bold: The Campaign for William & Mary*.
- W&M Athletics has the opportunity to enhance the national and international visibility, image and brand of the university.
- W&M Athletics has the opportunity to increase student and spectator attendance at athletic contests and special events.
- William & Mary must make decisions on the size and scope of its athletics program.

Assumptions

In drafting *Securing the Future*, W&M Athletics assumed the following principles that we believe are shared with university leadership and the Board of Visitors:

- William & Mary is a highly selective, public institution that aspires to provide outstanding academics that benefit the people of the Commonwealth of Virginia and the nation.
- William & Mary affirms that participation in NCAA Division I athletics is congruent with the university's vision and mission.
- William & Mary promotes a healthy relationship with the Williamsburg community and the local region of Coastal Virginia.
- W&M Athletics complies with federal, state, NCAA, Colonial Athletic Association, Board of Visitors and institutional regulations.
- W&M Athletics recognizes that excelling as a NCAA Division I athletics program requires ongoing and sustainable revenue sources.
- W&M Athletics understands the importance of exploring new revenue sources.
- W&M Athletics practices fiscal integrity, accountability and transparency.
- W&M Athletics supports each student-athlete and their progress towards graduation.
- W&M Athletics champions an outstanding student-athlete experience.
- W&M Athletics embraces gender equity, diversity and inclusion.
- W&M Athletics values and cultivates relationships with internal and external stakeholders.

Vision Statement

The vision of William & Mary Athletics is to boldly pursue excellence.

Mission Statement

We are committed to an outstanding intercollegiate athletics program that will enhance the university and Williamsburg community by:

Forging an environment that demands success with integrity;

Winning championships;

Empowering leaders;

Building a championship culture;

Elevating the prestige of the university; and

Instilling pride and respect.

Core Values and Values Statements

William & Mary Athletics is guided by the following Core Values:

Accountability: Taking ownership and responsibility for our actions;

Achievement: Empowering the personal development and success of our student-athletes, coaches and staff;

Inclusivity: Welcoming, respecting and valuing individuals of diverse cultures, opinions and experiences, and providing a safe, healthy, equitable, respectful, and inclusive environment in which all student-athletes and staff have the opportunity to thrive;

Innovation: Utilizing a collaborative spirit and technology to achieve creative and ingenious solutions;

Integrity: Striving to do the right thing, always;

Leadership: Developing and graduating student-athletes equipped to lead lives of impact.

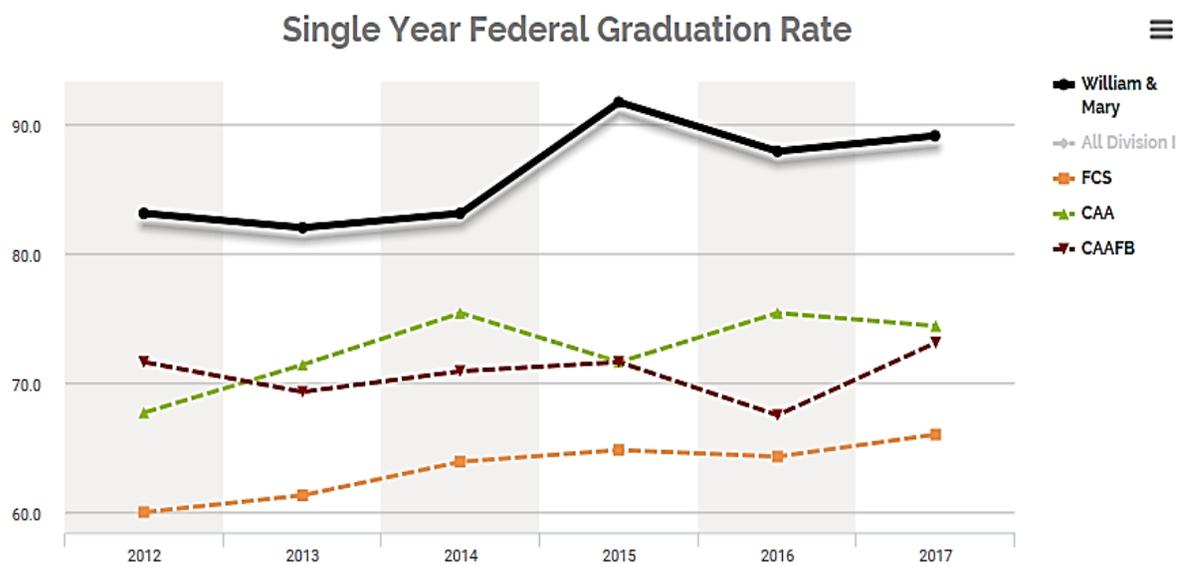
Situation Analysis

Strengths

Academic Success

Many William & Mary varsity sports programs rank in the top 10% nationally on the Academic Progress Rating (APR), one of the three major academic ratings published by the NCAA. Academic Year 2017-2018 marked the second consecutive year that W&M Athletics has earned nine team APR awards, and the sixth consecutive year with six or more. William & Mary is tied for third among public universities with its nine APR awards, ranking behind the University of Michigan and the University of North Carolina Chapel Hill. William & Mary also tied for first in the Colonial Athletic Association (CAA) alongside the University of North Carolina Wilmington. William & Mary ranked first in the state of Virginia, with the University of Virginia as the next closest with seven honors. William & Mary's latest Institutional APR score of 993 (out of 1000) is in the 88th percentile of all NCAA Division I institutions.

The 2017 William & Mary student-athlete Federal Graduation Rate (FGR) of 89.1% is the highest graduation rate among public universities for the 14th year in row and is 20 points above the NCAA Division I student-athlete average of 67.1%. W&M Athletics' FGR ranked first in the CAA and in the state of the Virginia. William & Mary's current overall undergraduate student body six-year FGR is 92.1%, and its average first-year retention rate is 96%.



William & Mary’s multi-year NCAA Graduation Success Rate (GSR) of 93% is fourth among public universities and is only one percentage point lower than the GSR for the top public institution. It should be noted that the national NCAA Division I average GSR is 87%.

William & Mary student-athletes posted a cumulative Grade Point Average (GPA) of 3.27 in 2017-18, and all but one varsity sports program posted a team GPA of 3.0 or better. A total of 187 student-athletes have been elected to the Phi Beta Kappa honor society, with 72 selected since 1990. One hundred sixty-two student-athletes were recognized as Provost Award winners in February 2018 for achieving a cumulative GPA of 3.5 or above. In the 2002-03 academic year, the CAA created a Scholar-Athlete of the Year Award in each of its conference sponsored sports. As of June 2018, William & Mary leads the CAA with 74 award winners.

Accomplished Alumni

Known as “the alma mater of the nation,” William & Mary’s alumni include four presidents and national and world leaders in a multitude of professions. More than 98,000 alumni comprise the William & Mary worldwide network.

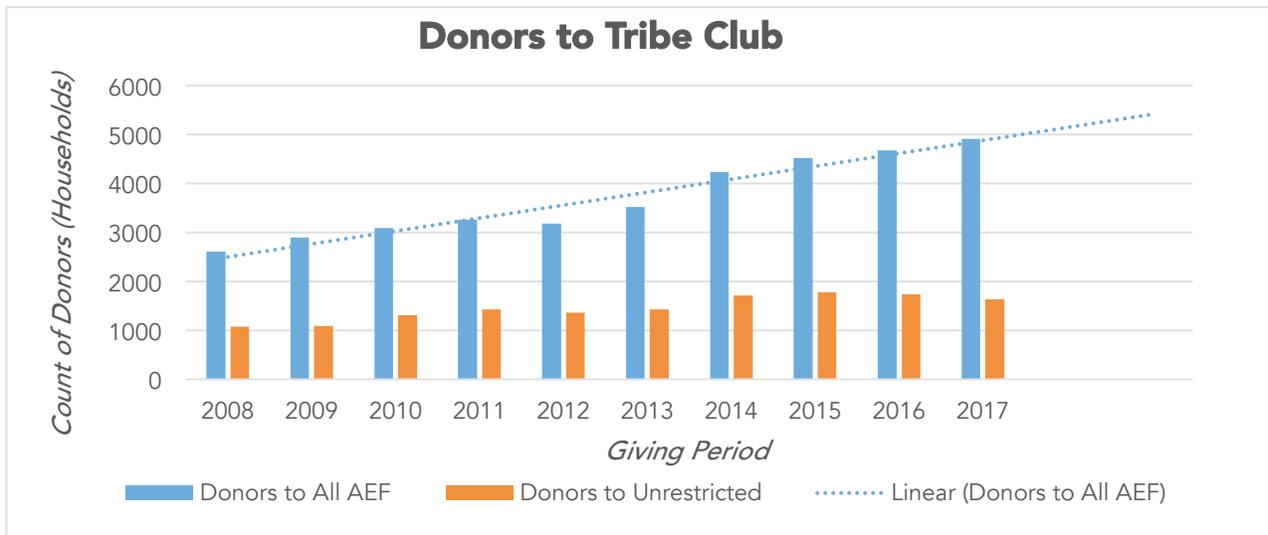
Campus Setting

William & Mary was established by royal charter in 1693 by King William III and Queen Mary II of England. Its beautiful, historic campus spans 1,200 acres and is within a one hour drive from three major airports and multiple modes of public transportation. Williamsburg, a part of the Historic Triangle that also includes

Yorktown and Jamestown, is an internationally known tourist destination that is within easy access of all of Virginia’s natural attractions, major cities and entertainment venues.

Loyal Donors and Alumni

After graduating, W&M Athletics alumni remain committed to their alma mater. They serve in leadership roles and give more frequently and more generously than their peers. Roughly 30% of William & Mary alumni give back to the university, making it the top-ranked public institution for alumni giving. W&M Athletics donors demonstrate remarkable loyalty to and pride in W&M Athletics as evidenced by consistent giving of their time, talents and treasure. During the 2018 *One Tribe One Day Campaign* (a single day of giving), a total of 2,425 donors contributed \$451,000 to Athletics. In the 2017-18 academic year, 100 percent of student-athletes donated to the “10 for the Tribe” campaign.



In 2016-17, 33% of all athlete alumni donated to W&M Athletics. Young athlete alumni graduating between 2006 and 2017 increased their overall giving as a group by 23%. From 2008 to 2017, Tribe Club donors and gifts have continued to increase to W&M Athletics.

Another strength of the university is demonstrated by its compelling fundraising goal of \$1 billion as part of *For the Bold: The Campaign for William & Mary*. This strategic initiative focuses on scholarships, learning environments and leadership. *For the Bold* also includes a goal of achieving 40% participation in alumni giving. As of June 30, 2018, over \$800 million had been raised for the *Campaign*.

Strong alumni financial support is also demonstrated by the recent \$28 million expansion and renovation of Zable Stadium. This extensive renovation provides William & Mary student-athletes and patrons with one of the finest football facilities in the nation for a Football Championship Series (FCS) program.

National Rankings

William & Mary consistently ranks among the nation's best public universities, and it often stands alone as the top small, public, highly selective research institution. William & Mary ranked sixth among public universities and 32nd among all national universities according to *U.S. News and World Report* in 2018. In addition, William & Mary ranked 58th overall in *Forbes'* ranking of American Top Colleges, which combines universities and colleges on a single list.

Residential Campus

Over 70% of William & Mary's undergraduate students reside on campus in university housing. William & Mary's campus is easily accessible for students attending class and engaging in other social and cultural activities. Campus life at William & Mary offers many opportunities to build a close-knit community through social, recreational and educational experiences. The diverse campus community provides opportunities for interaction with individuals of different cultures, races and ethnicities.

Research University with a Liberal Arts Core

William & Mary has been described as having the brains of a great research university and the heart of a small liberal arts college. President Emeritus Taylor Reveley defines William & Mary as being "human in scale," meaning the classes are small and students are known by name. William & Mary's 11-to-1 student-faculty ratio is the lowest among the top public universities, an indicator of the university's commitment to teaching and learning. William & Mary has more recipients of the Commonwealth of Virginia's Outstanding Faculty Award than any other college or university in the state. Eighty-six percent of William & Mary's classes have fewer than 40 students and almost half have fewer than 20 students.

Athletics

W&M Athletics has a rich and storied history. As a founding member of the Colonial Athletic Association, William & Mary was the first CAA member to reach 100 CAA titles and has continued its league dominance in men's and women's cross country, women's tennis and swimming. The Tribe currently has earned 136 CAA titles. William & Mary has been a member of the NCAA since 1936 and has appeared in the national tournaments or bowl games 254 times.

Since the Learfield Director's Cup standings began in 1993-94, William & Mary has placed among the top 100 on 14 occasions. The Tribe's best finish in the Learfield Director's Cup came in 1997 at 42.

Weaknesses

W&M Athletics faces increased competition, particularly from CAA peers who invest more and are more intentional in their varsity sports offerings. Operating a broad-based athletics program of 23 varsity teams without sufficient funding, staffing and top-notch practice and competitive venues dilutes the quality of the student-athlete

experience and diminishes the ability to field and sustain a successful athletics program.

Institutional Financial Support

W&M Athletics currently sponsors 23 varsity sports with 540 student-athletes while providing 703 participation opportunities (as some student-athletes participate in more than one varsity sport). Given the organizational structure and the insufficient funding levels, W&M Athletics' current financial model is not sustainable.

The university provides financial support through the *Student Athletic Fee* that funds approximately 55% or \$15 million of the overall Athletics operating budget of \$27 million. This *Student Athletic Fee* at William & Mary is the second-highest (\$1,980) among Division I athletics programs in Virginia. Virginia Military Institute's student fee for athletics is \$3,340, Longwood University's is \$1,888, James Madison University's \$1,677 and Old Dominion University's \$1,637.

The William & Mary *Student Athletic Fee* is not significantly higher than other Virginia institutions, though increases to William & Mary's fee, and thus the potential to increase resources for athletics through this source, would find limited support within the university.

Another factor that significantly impacts W&M Athletics is the small full-time equivalent (FTE) enrollment of 7,550 students compared to other public institutions in Virginia. For example, James Madison University has an undergraduate enrollment of 19,548 students, with a student fee allocated for athletics of \$1,677. Old Dominion University has an undergraduate enrollment of 19,540 and student fee allocated for athletics of \$1,637.

While the *Student Athletic Fee* supports more than half of W&M Athletics' operating budget, approximately \$10 million is returned each year to the university via athletic scholarships awarded to student-athletes. Simply put, the university invests approximately \$5 million in W&M Athletics each year.

Due to funding limitations, W&M Athletics offers approximately 85% of the total allowable athletic scholarships per NCAA legislation and its scholarships reflect the in-state/out-of-state mix required of William & Mary as a public university of Virginia.

William & Mary Athletics is also financially unable to fully provide summer school financial aid for all of its student-athletes. Currently men's and women's basketball are

the only two varsity sports funded to provide athletically related financial aid to its student-athletes during the summer sessions. This greatly impacts the ability to recruit the best student-athletes in the other varsity sports.

Winning

Competitive success has an impact on school spirit, alumni engagement and fan attendance. Winning teams generate revenues in ticket sales, alumni and donor giving, corporate sponsorships, licensing, merchandising, concessions and parking.

W&M Athletics has had success in winning CAA championships in a few sports over the last 10 years. Football has captured two CAA championships (2010, 2015) while men's and women's basketball have yet to win a CAA tournament championship to advance to the NCAA Basketball Tournaments.

Women's tennis and men's and women's cross country account for 71 of William & Mary's 128 CAA championships (55%) through 2016-17. Seven varsity sports programs (women's tennis, men's and women's cross country, men's and women's soccer, volleyball, and women's track and field) account for 84% of William & Mary's CAA championships won. Twenty-one CAA championships have been captured by eight other varsity sports programs.

W&M Athletics' CAA championship success has also been uneven within the last decade. Three sports (women's tennis and men's and women's cross country) account for 22 of William & Mary's 40 CAA championships (60%) in the last decade. Five sports (women's tennis, men's and women's cross country, men's swimming and women's track and field) account for 78% of William & Mary's CAA championships. Nine CAA championships have been captured by seven other varsity sports programs.

W&M Athletics has failed to win consistently in the three highly visible, community-building and greater-revenue-producing sports of football, men's and women's basketball.

In the last five years, football-generated revenues have decreased. The inconsistent performance has resulted in volatile attendance. In 2013 and 2014 football won 50% of its games. In 2015, football rebounded and won 75% of its games. In 2016 football began a decline, winning only 38% of its games, and in 2017 football won only 10% of its games.

Over the past five years men's basketball won approximately 60% of its games each year:

- 2013-14: 62%
- 2014-15: 66%
- 2015-16: 61%
- 2016-17: 55%
- 2017-18: 61%

While men's basketball ticket revenues have slightly increased over the past five years, a more successful basketball program would generate even greater ticket revenues. In 2014-15, men's basketball captured the CAA regular season title, lost in the CAA championship game, and advanced to the National Invitational Tournament. As a result of winning 66% of its games and winning the CAA regular season title in 2014-15, ticket revenues in 2015-16 increased by 31%, from \$183,000 to \$240,000.

Women's basketball competitive success has also been inconsistent. In 2013-14 women's basketball won only 31% of its games. In 2016-17, women's basketball won 50% of its games and realized a 21% increase in ticket revenues.

Brand Identity and Intellectual Property

William & Mary's nickname, *Tribe*, is not well-known outside the state of Virginia. There is confusion between the nickname *Tribe* and its affiliation with William & Mary. A further complication to the brand identity is the Griffin mascot, which was selected in 2010 as a result of the NCAA eliminating Native American-affiliated mascots and logos. The confusion continues to manifest itself on campus where there is little to no representation of W&M Athletics marks and logos. While apparel and other branded merchandise is readily available to students and fans, it is not highly visible. Another challenge for W&M Athletics is the inconsistent use of approved and branded marks and colors being used by Athletics staff. This devalues and cannibalizes William & Mary's intellectual property.

Facilities

While some W&M Athletics varsity sports programs enjoy updated and recently renovated facilities, other varsity sports programs are at a significant disadvantage in training, practice and competition venues. Inadequate facilities not only impact the student-athlete experience but also the recruitment and retention of talented student-athletes, coaches and staff.

W&M Athletics has outgrown administrative offices and student-athlete performance areas located in Kaplan Arena. Due to the age of Kaplan Arena and the outdated infrastructure, many varsity sports programs share limited practice and competition spaces. Each year, Kaplan Arena is utilized for several non-athletic, non-revenue generating university events. This further limits Athletics' ability to leverage the arena for outside revenue generation and most importantly limits usage of the arena by student-athletes, coaches and teams.

Other challenges are a lack of restroom facilities at Busch Field and the Millie West Tennis Center. Wi-Fi access and connectivity needs to be addressed at all facilities and venues. Limited practice and competition space for W&M Athletics' 23 varsity sports programs as well as some shared utilization with Campus Recreation creates scheduling challenges.

Diversity

Diversity enhances the learning and cultural environment by introducing individuals to different and new ideas and cultures. Although increasing diversity is a priority for William & Mary, racial diversity is not represented in Athletics. Out of 135 full-time staff, 70% are male and 30% are female. Of the 135 full-time staff, 14% are persons of color. Out of 95 head and assistant coaches, 83% are male and 17% are female. Out of 95 coaches, 9% are persons of color. Of the William & Mary student-athlete population, 67% are White and 13% are African American. Efforts must be made to increase diversity in the W&M Athletics staff by gender, race and ethnicity. Another focus should be increasing racial and ethnic diversity in the student-athlete population.

Media Market

Major media markets in nearby Richmond and Norfolk are dominated in print and on screen by comprehensive coverage of FBS athletics programs. The University of Virginia, Old Dominion University, Virginia Commonwealth University, and Virginia Tech appear to receive the majority of print and digital coverage. Lack of local television stations, limited radio options and a local newspaper (printed twice a week) makes media coverage very challenging for the university and for W&M Athletics.

Compensation and Benefits

W&M Athletics is at a competitive disadvantage overall in salaries and benefits for coaches and staff compared to the CAA peers. According to the 2017-2018 CAA Compensation Survey, William & Mary Athletics is at the bottom half of the CAA in

both overall administrative and coaching compensation. This puts W&M Athletics at a significant competitive disadvantage in the marketplace when attracting, recruiting and hiring coaches and staff, especially in the high visibility sports of football, men’s and women’s basketball.

Fan Engagement

Fan attendance at W&M Athletics events is inconsistent. This is partly attributable to the game day experience and the teams’ records. Enhancing the game day experience must be a priority so fans can experience a festive and entertaining environment. Winning teams also attract and retain fans.

Student-Athlete Support Services

W&M Athletics employs fewer support staff who directly impact the student-athlete experience. Given the staff-to-student-athlete ratios, W&M Athletics is under staffed to provide appropriate support services to its 540 student-athletes. In academic support, the ratio of staff to student-athlete is 1:270. In athletics performance (strength and conditioning), the staff to student-athlete ratio 1:135 and in the area of sports medicine the ratio is 1:49. In these three areas the staff to student-athlete ratio is among the lowest three in the CAA.

Support Services Ratios:

School	Academic Services	Athletics Performance	Sports Medicine
William & Mary	1:270	1:135	1:49
College of Charleston	1:120	1:119	1:71
Drexel	1:78	1:156	1:78
Delaware	1:116	1:116	1:41
Elon	1:95	1:95	1:47
Hofstra	1:158	1:105	1:45
James Madison	1:50	1:66	1:26
Northeastern	1:113	1:90	1:50
Towson	1:70	1:122	1:40
UNCW	1:88	1:116	1:38

Opportunities

Competitive Success

W&M Athletics has a tremendous opportunity to build an excellent athletics program and create a culture that demands success, but it must be committed to winning CAA championships in football and men's and women's basketball. Having success in these three varsity programs will bring prestige and visibility to not only the athletics program, but to the entire university community. It is critical that W&M Athletics be intentional about allocating and aligning operating budgets, staffing and resources with competitive expectations.

The high-profile sports of football and men's and women's basketball are uniquely positioned to build university community when they win. These community-building sports create school spirit, unify the local community, build enthusiasm and enhance revenues.

As realized by other mid-major institutions, W&M Athletics has a unique opportunity to establish consistent success in football and men's and women's basketball. Winning CAA championships and success on the national stage can lead to increased visibility, revenues, fan attendance and student applications for admission.

Research has demonstrated that title winners, NCAA Final Four participants and those schools eliminated in earlier tournament rounds can see student applications, enrollment, donations, merchandise sales, web traffic and social media increase. And for teams classified as mid-majors, those effects can be even more noticeable.

Loyola University (Chicago), which advanced to the Final Four in 2018, saw the impact almost immediately. Requests for information from prospective students were up 31% from March 1 to April 2 compared with the prior year. Web traffic was up also, with 91% of visitors being on the site for the first time. Donations to athletics increased sharply, experiencing a 660% increase over the same time period. The Ramblers also saw its social media followers increase by 34% with growth in engagement of 1,676%.

Villanova University, which won NCAA Men's Basketball Tournament championships in 2016 and 2018, has had a little longer to study the effects of its success while tracking on the additional impact of a second title in three years.

Like Loyola, Villanova has seen its web traffic and social media reach increase dramatically. With 875,000 new visitors to the university website from March 11 to

April 5, 2018, it saw a 108% year-over-year increase. In 2018, villanova.edu averaged 40,000 visits per day, but that rose to 175,000 during the championship game.

Villanova also saw its social media following increase by 12,000 on Facebook during the 2016 run to the national championship. In 2018, Villanova gained over 1,000 new followers, with another 3,000+ on Instagram and 1,500+ on Twitter.

One of the most significant impacts is the increase in student applications. For the Fall 2016 incoming class, Villanova received 17,266 student applications. Following its 2016 national championship, applications rose to 21,095, a 21% increase.

Villanova acknowledges, however, that it had another significant event in 2016 that may have positively impacted student applications: the Carnegie Foundation elevated Villanova to the Doctoral Universities category, which placed it on *U.S. News & World Report's* National Universities list for the first time.

Although Loyola and Villanova are both private universities, public universities have seen an added boost from the increased interest and applications from prospective students in the past.

In 2013, Florida Gulf Coast University became the first No. 15 seed to make the Sweet Sixteen. Florida Gulf Coast saw student applications increase by 39%, with applications from out-of-state students increasing 68%.

Virginia Commonwealth University had a similar experience two years earlier following its Final Four appearance in 2011. Just one year later the Rams made it to the third round in 2012. Taking a look at the 2008 freshman class at VCU, 92% were Virginia residents. By Fall 2012 Virginia residents decreased to 85%. The increased tuition for VCU amounted to an additional \$3.4 million in 2012.

But even without the out-of-state tuition increase, Loyola and Villanova can take advantage of enrolling more academically elite incoming classes as a result of the increase in student applications.

According to studies commissioned by Butler University after its 2010 and 2011 appearances in the NCAA Men's Basketball Championship game, media mentions during that time are publicity that money can't buy. The studies, completed by media firms Borschoff and Meltwater, found a combined publicity value of \$1.2 billion for Butler during the 2010 and 2011 NCAA Men's Basketball Tournaments.

Most of the studies that have been published on the impact of men's basketball or football success agree that these positive effects only last two to three years. That means universities have to be prepared to capitalize quickly following the NCAA Tournament and return with another deep run quickly to keep up the momentum in the future.

Fundraising

With expenditures in college athletics continuing to escalate and expectations for winning increased, philanthropic support is critical. W&M Athletics must expand its donor base as it builds a more sustainable financial model. Opportunities for fundraising include annual giving, major gifts and endowment. Other opportunities for W&M Athletics to increase fundraising include initiatives for women in philanthropy and Athletics' staff giving.

Community Engagement

Athletics contests and special events build connections that provide positive interactions between community members and the university. W&M Athletics has the opportunity to invest in community engagement and outreach to strengthen ties to Williamsburg and the greater Hampton Roads area. With no other NCAA Division I athletics program or professional sports franchise within 25 miles, W&M Athletics can be one of the destinations for exciting college sports entertainment.

Campus Partnerships

W&M Athletics has a unique opportunity to build, nurture and enhance campus partnerships with the university. Developing these relationships will be mutually beneficial and add to the vibrancy of campus life.

New Institutional Leadership

It's an exciting time for William & Mary. With a new university president, Dr. Katherine A. Rowe, and a new rector, John E. Littel, there is a tremendous opportunity to work in partnership with Athletics Director Samantha K. Huge to advance W&M Athletics.

Intellectual Property

Aligning W&M Athletics' marks and logos with the university will unify the brand and serve as a platform for national recognition. This is a tremendous opportunity to unite Athletics under one primary and secondary mark by capitalizing on uniformity and consistency.

Corporate Sponsors, Licensing

W&M Athletics, in conjunction with campus partners, selected Van Wagner as the media rights partner for William & Mary. Having never worked with a group that can access partnerships on the national stage, W&M Athletics has an opportunity to increase the visibility of the brand and generate revenues that will enhance the athletics program.

Threats

Adverse Publicity

Given the public interest in college athletics, William & Mary student-athletes and coaches are frequently in the public eye. All intercollegiate athletics programs may be threatened by scandal. Personal wrong doings by student-athletes, coaches, staff and/or athletics representatives may also damage the reputation of the W&M Athletics and may impact relationships with internal and external stakeholders.

Conference Instability

William & Mary is a founding member of the Colonial Athletic Association. Membership has changed significantly over the last five years as the national landscape continues to experience volatility. Conference realignment paired with leadership change in the CAA creates uncertainty. Realignment of CAA members could adversely impact W&M Athletics in a variety of ways. Increases in expenditures for team travel and recruiting will negatively impact operating budgets. Scheduling home and away contests will be challenging. Conference rivalries will be diminished, which will impact fan attendance.

Inadequate Facilities

While there have been some recent improvements and new construction in some varsity sports programs, other sports still practice and compete at inadequate venues. To achieve and sustain competitive success, teams must have outstanding facilities to recruit and train the best student-athletes. Facilities continue to hinder W&M Athletics.

Lack of Diversity

College athletics programs are generally one of the most diverse populations on campus, for both student-athletes and staff members. W&M Athletics' student-athlete population is less diverse than the general undergraduate student body population. W&M Athletics must attract, recruit and retain more student-athletes and staff of color to be more representative of the world at-large.

Females and persons of color are under-represented on the W&M Athletics staff. There must be a concerted effort to diversify by race and gender in coaches, administrators and staff. By not having a more diverse and inclusive environment, W&M Athletics may be viewed by some as privileged and elitist.

Lack of a Sustainable Financial Model

Without additional financial support, W&M Athletics will be challenged to continue to maintain its 23 varsity sports programs, 540 student-athletes and 703 participation opportunities in a manner consistent with a successful NCAA Division I athletics program. Continuing to operate under the current organizational structure and funding model hurts the reputation of the university and does not provide a championship experience for the student-athletes.

W&M Athletics supports 38% more student-athletes than CAA peers. CAA peers on average spend 32% more per student-athlete than W&M Athletics.

Spending Per Student-Athlete

NCAA Division I Group	Average S/A Participation*	Spending per Student-Athlete
I-FBS	605	\$111,641
I-FCS	541	\$35,031
CAA	510	\$51,769
William & Mary	703	\$39,174

*Includes student-athletes who participate in more than one varsity sports

Funding 23 varsity sports programs with 540 student-athletes and 703 participation opportunities each year continues to put W&M Athletics further behind its CAA peers and impacts achieving and sustaining competitive success.

Program Goals

Goal One: Academic Excellence

Recruit, retain and graduate student-athletes by providing the resources, mentoring and support to excel academically.

Goal Two: Competitive Success

Attract, recruit, develop and retain high-performing student-athletes who demonstrate the ability and potential to win championships.

Goal Three: Financial Stability

Support the strategic priorities of William & Mary Athletics by maximizing revenue opportunities and managing expenses.

Goal Four: Student-Athlete Experience

Provide resources, programming and an inclusive environment in which all William & Mary student-athletes can reach their full potential.

Goal Five: Uncompromising Ethics

Create and sustain an environment that strives to always do the right thing with transparency and accountability.

Goal Six: Envable and Functional Facilities

Provide NCAA Championship caliber facilities to build and sustain winning teams that will enrich the stakeholders' experience.

Appendix 1: Strategic Review Working Group

Chelsey Burke, Associate Athletics Director, Business Affairs

Tiffany Christian, Assistant Athletics Director Compliance Services

Steve Cole, Associate Athletics Director, Internal Affairs

Pete Clawson, Senior Assistant Athletics Director, Public Affairs

Bobby Dwyer, Senior Associate Athletics Director, External Affairs

Peel Hawthorne, Associate Athletics Director for Student Services/SWA

Samantha Huge, Director of Athletics

Erik Korem, Associate Athletics Director, Student-Athlete High Performance

Julia Martin, Chief of Staff, Coordinator of Athletics Strategies & Engagement

Jason Simms, Associate Athletics Director, Academic Services

Appendix 2: Process and Timeline

PHASE ONE: Preliminary Work | January 2018

1. Review the 2015 *Committee on Competitive Excellence Report*
2. Determine other informational materials and data to be provided
3. Determine dates of weekly conference calls
4. Determine who will be engaged in the Strategic Review and long-range financial planning process
5. Decide who will draft the final copy of the Strategic Review
6. Discuss who will receive a copy of The Strategic Review
7. Develop a timeline for the strategic and financial planning process
8. Determine deadline for completion of The Strategic Review
9. Establish *Implementation Plan* for distribution of The Strategic Review
10. Develop *Communications Plan* for the distribution of The Strategic Review
11. Discuss preliminary strategic planning assignments
 - a. Research top Industry Trends (Environmental Analysis)
 - b. Initiate NCAA Institutional Performance Plan (IPP) Data Review
 - i. Identify comparative groups
12. Initiate the discussion of the *SWOT Questionnaire* for constituents utilizing *Survey Monkey* by **The PICTOR Group (TPG)**
 - a. Select campus constituents-faculty, staff, administrators
 - b. Select external constituents-alumni, donors, season ticket holders
 - c. Select internal constituents-coaches, student-athletes, staff
13. Establish details for first on-site visit
 - a. Identify Strategic Planning Leadership Committee
 - i. Athletics Director
 - ii. Senior Leadership Team
 - iii. Key Stakeholders
 - b. Schedule on-site visit

PHASE TWO: On-Site Facilitation | February 21-23, 2018

1. Conduct overview of strategic and financial planning process by **TPG**
2. Discuss Industry Trends (Environmental Analysis)
3. Discuss Vision, Mission, Core Values, Core Value Statements, Diversity Statement and the Unique Value Proposition
4. Discuss Assumptions and *SWOT Questionnaire*
5. Discuss timeframe of The Strategic Review
6. Discuss *Action Plans*
7. Conduct targeted interviews with key stakeholders

8. Determine assignments for Industry Trends (Environmental Analysis)
9. Determine assignments for Situation Analysis (SWOT)
10. Discuss Goals for The Strategic Review

PHASE THREE: Leadership Team Work | February-March 2018

1. Draft top Industry Trends (Environmental Analysis)
2. Draft Assumptions narrative
3. Draft Vision, Mission, Core Values, Core Value Statements, Diversity Statement and the Unique Value Proposition
4. Finalize and distribute the *SWOT Questionnaire* to W&M utilizing Survey Monkey by **TPG**
5. Distribute *Survey Monkey* to constituent groups by W&M
6. Analyze *SWOT Questionnaire* results by **TPG**
7. Distribute *SWOT Questionnaire* results to W&M
8. Draft *SWOT narrative* from *Questionnaire* results
9. Provide **TPG** with initial drafts of top Industry Trends narrative, Assumptions, Vision, Mission, Diversity and Values statements
10. Provide feedback on top Industry Trends narrative, Assumptions, Vision, Mission, Diversity and Value statements by **TPG**
11. Agree on Goals for The Strategic Review with input from **TPG**

PHASE FOUR: On-Site Facilitation #2 | April 7-9, 2018

1. Review key elements of The Strategic Review
 - a. Top Industry Trends (Environmental Analysis)
 - b. Vision, Mission, Core Values, Core Value Statements, Diversity Statement and the Unique Value Proposition
 - c. Assumptions
2. Discuss and refine *SWOT narrative*
3. Introduce and discuss *Action Plans*
4. Assign W&M Athletics program area Goals
 - a. Objectives
 - b. Strategies
 - c. Measures
 - d. Targets
 - e. *Action Plans*
 - f. Accountability

PHASE FIVE: Refine *The Review* | April-May

1. Draft W&M Athletics program area Goals

2. Identify data to be integrated into *Long-Range Financial Models*
3. Continue to refine the key elements of The Strategic Review and *Long-Range Financial Plan* and provide to **TPG** for review and feedback
 - a. Top Industry Trends (Environmental Analysis)
 - b. Vision, Mission, Core Values, Core Value Statements, Diversity Statement and the Unique Value Proposition
 - c. SWOT Analysis and Assumptions

PHASE SIX: On-Site Facilitation #3 | May 20-23, 2018

1. Introduce Long-Range Financial Planning and Data Analysis
 - a. Conduct long-range financial planning sessions
 - b. Discuss State of the Unit Financial Data process
 - c. Discuss and Review IPP Data
2. Discuss integration of Financial Planning components with Strategic Planning
3. Discuss *Committee on Competitive Excellence Report*

PHASE SEVEN: On-site Facilitation #4 | June 24-29, 2018

1. Complete final draft of The Strategic Review and send to **TPG** for final review
2. Discuss the *Communication and Implementation Plans* of The Strategic Review

PHASE EIGHT: Communicate *The Plan* | July-August 2018

1. Present *A Strategic Review: Securing the Future* to key constituencies (as determined by the Athletics Director)

Process and Timeline subject to change