



WILLIAM & MARY  
CHARTERED 1693

## KPI Executive Summary

W&M university strategy: *to ensure the most personal learning experience of any public university in the nation.* W&M Key Performance Indicators (KPIs) allow us to track and analyze business performance towards this strategy.

**Committee Name: Financial Affairs**

**Date: September 2023**

### KPI Title: Composition Indicators

**SUMMARY:** This KPI tracks key components of W&M’s “public university” and “national” strategy. Our mission defines W&M as a “vibrant and inclusive community.” Ensuring a cosmopolitan composition of the student body, primarily through enrollment of new and transfer students, is critical to that mission. Beginning in fall 2023, an applicant’s race will not be included as part of the demographic information available to application reviewers during the admission process. The university has established concrete goals to advance socioeconomic diversity (see below).

**DATA:** number of Pell recipients enrolled, including both fall admits and transfers.

**CYCLE:** annual

**S.M.A.R.T. GOAL:** 20% in-state Pell recipients by 2026. Currently **18.1%**. Consider resourcing needed to achieve 10% OOS by 2030. OOS currently **3%**.

**DECISION-MAKING:** Inform the Board about the enrollment efforts to increase socioeconomic diversity as part of a “vibrant and inclusive community.” Tuition and philanthropy are the primary resources for scholarships, so this KPI informs votes on the Six-Year Plan (SEPTEMBER), Tuition setting (APRIL), advancement strategy and overall institutional strategy: *a national university must offer scholarships out of state.*

### SAMPLE GRAPHS FOR A QUADRANT

