STRATEGIC PLANNING
2019-20

BOV Retreat -- July 24, 2019
CONTENTS

• Strategic Planning Overview
• W&M Core Values
• Ad Hoc Committee
GOALS FOR THE PROCESS

• Advance a whole-institution mindset throughout W&M
  – Create greater shared understanding of the opportunities and challenges over the coming decade
  – Reinforce our shared responsibility for cultivating opportunities and crafting solutions

• Embolden our community to embrace our history of innovation
  – Encourage entrepreneurial, disciplined experimentation throughout the university
  – Take advantage of W&M’s distinctive assets and excellence as we develop creative solutions
GOALS FOR THE PLAN

• Advance William & Mary’s distinctive excellence in a rapidly changing environment, thereby raising our profile nationally and globally

• Position W&M for long-term financial sustainability in a way that aligns our operational and financial models with academic mission
A VALUES-DRIVEN PROCESS

• “We change to advance what we value most”
• Vision, Mission and Values at the core
• Instilling a continuous strategic management approach
A COLLABORATIVE PROCESS

Committee

- 24 members, broadly representative
- Solicit, filter and prioritize ideas from community
- Evaluate input, prioritize initiatives to propose a framework and goals

Cabinet

- 25 members, 9 on the Strategic Planning Steering Committee
- Review and validate the recommendations of the Comm.
- Makes affirmative recommendations on strategy to the president
# PHASES OF PLANNING

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DISCUSSION

• Are any key elements of planning missing?
• Is our intended process aligned with the expressed desires of the Board and community from the past year?
WILLIAM & MARY
CORE VALUES

Ginger Ambler, Vice President for Student Affairs
Chon Glover, Chief Diversity Officer

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THE CHARGE
COMMITTEE MEMBERS

• Ginger Ambler and Chon Glover, Co-Chairs
• Michael Halleran, Provost
• Heather Golden, Advancement
• Jamie Settle, Government Faculty
• Brendan Boylan ‘19, Former SA President
OUR WORK
DRAFTING PRINCIPLES

• Buzzwords should be avoided
• Values ought to resonate with faculty, staff, and students
• Values are not listed in a “priority” order (alphabetical/not hierarchical)
• Active verbs will drive the document
• Claim unique territory – “Does it sound like W&M?”
• Bring forward durable language from key W&M documents
SHARING THE DRAFT
CORE VALUES OF W&M

- Wellness
- Belonging
- Service
- Curiosity
- Respect
- Integrity
- Excellence
DISCUSSION

1. What resonates for you?
2. What does not resonate for you?
3. Is something missing?
3. Thoughts on the structure?
AD HOC COMMITTEE FOR INSTITUTIONAL SUSTAINABILITY & INNOVATION
Operating Model vs. Financial Model
Operating Model aligned with Financial Model
AREAS OF FOCUS IN 2019-2020

• Strategic Planning
• Capacity Building
• Diversity & Inclusion
DISCUSSION

• Are there other areas of focus that require the ad hoc committee’s attention?
• How can we make the ad hoc committee most effective in the coming year?