Strategic Planning Update
Today

• Process Update
• Subcommittee Presentations
  – Teaching & Learning
  – Research & Innovation
  – Flourishing & Engagement
• Next Steps
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

To achieve these goals for the plan, W&M will intentionally focus on our most significant opportunities – a select few primed for greatest impact
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
A Values-Driven Process

• “We change to advance what we value most”

• Vision, Mission and Values at the core

• Applying a continuous strategic management approach
## Phases of Planning

### Phase I: Vision, Mission, Values
- **SPSC Responsibility**
  - **Fall 2019**
    - Community Forums:
      - Sep. 4
      - Oct. 1
      - Nov. 7
      - Dec. 10
  - **Spring 2020**
    - Community Forums:
      - Jan. 30
        - Feb. 12
        - Mar. 4
        - Apr. 8

### Phase II: Environmental Analysis
- **SPSC Responsibility**

### Phase III: Strategy Development
- Cabinet and SPSC Collaboration

### BOV Meetings/Community Updates:
- **SPSC Responsibility**
  - **Fall 2019**
    - Community Forums:
  - **Spring 2020**
    - Community Forums:
  - **BOV Meetings/Community Updates:**
    - Sep. 24-26
    - Nov. 20-22
    - Feb. 5-7
    - Apr. 22-24

<table>
<thead>
<tr>
<th>Aug</th>
<th>Sep</th>
<th>Oct</th>
<th>Nov</th>
<th>Dec</th>
<th>Jan</th>
<th>Feb</th>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>4</td>
<td>24-26</td>
<td>1</td>
<td>7</td>
<td>20-22</td>
<td>10</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>30-5</td>
<td>12</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
<td>8</td>
<td>22-24</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Phase I

VISION, MISSION, VALUES
Phase I: Complete

- **May**: Research, drafting of W&M values
- **Jun**: Values drafting group launched
- **Jul**: Initial feedback, need identified to engage V-M-V as a whole
- **Aug**: Mission drafting group launched; additional feedback received
- **Sep**: Incorporating feedback, refining drafts; initial feedback on comprehensive V-M-V draft
- **Oct**: Community feedback (forum, online); incorporating feedback, refining drafts
- **Nov**: Finalizing statement, BOV affirmation
Implementing Vision, Mission, Values

- **Nov**: BOV affirmation
- **Dec**: SCHEV submission for mission approval as required by code
- **Jan**: SCHEV approval; Cabinet shares during unit meetings
- **Feb-Jun**: VMV referenced consistently in university communications; Managers lead discussions with their teams during regular office meetings
- **FY21**: Continued implementation in strategic plan
Phase II

ENVIRONMENTAL ANALYSIS
Phase II Timeline

- **Sep**: Community forum identifies areas for scan
- **Oct**: SPSC subcommittees launched, outreach meetings
- **Nov**: Outreach meetings, shared reading for community alongside subcommittees
- **Dec**: Community forum recaps work to date, engages feedback on process so far
- **Jan**: Subcommittees share findings, community forum
- **Feb-Mar**: Depts./Programs, Assemblies asked to engage subcommittees work and offer feedback
Teaching & Learning Subcommittee

- Co-Chairs – Steve Hanson and Cathy Forestell
- Lynda Butler – Law School
- Stephanie Blackmon – School of Education
- Chon Glover – Chief Diversity Officer
- Mark Hofer – School of Education
- John Swaddle – Arts & Sciences – Biology
- Ellie Thomas – Undergraduate Student
- Tom Ward – School of Education
- Bob Williams – School of Business
Cherished Principles

• Collaborative teaching and learning across boundaries
• Research-based teaching and learning
• Personalized mentoring
• Global and experiential learning
Trends in Higher Education

• Changing demographics
• New educational technologies and changes to curriculum delivery
• Challenges to the reputations of universities
Opportunities for Change and Ongoing Challenges

- Barriers to collaboration
- Traditional and rigid infrastructure
- Increase domestic and global awareness
Research & Innovation

- Carl Friedrichs, VIMS, co-chair
- Amy Sebring, Fin. & Tech., co-chair
- Layla Abi-Falah ’17, J.D. ’20
- David Armstrong, Physics
- Sara Belmont, University Libraries
- Dan Cristol, Biology
- Dave Douglas, Law
- Mike Foradas, W&M Foundation
- Lynne Fors, University Libraries
- Roz Hargraves, W&M ACE Fellow
- Rajiv Kohli, Business
- Michael Luchs, Business
- Dan Parker, English
- Mike Tierney, Government
- Peggy Agouris, Ex-Officio, Provost
Leading R&I institutions share 6 common characteristics

1. A culture of experimentation and measured risk-taking
2. A pan-organizational approach that reduces silos
3. Collaborations with government, industry, and other higher education institutions
4. Differentiated knowledge and expertise
5. Infrastructure and support structures
6. Focused leadership
4 items will be important for R&I in the next strategic plan

1. Reducing silos
2. Differentiating W&M from others by building on our existing/emerging strengths
3. Enhancing current infrastructure and support structures
4. Balancing teaching & learning and research & innovation
To position W&M for success, we will need:

• A clearly defined strategy that is well-communicated and well-executed
• Organizational structure(s) that promote collaboration
• Incentives that reward success and create opportunities to learn from failure
• Physical space and technology tools that support the work
• Well-developed collaborations with external partners
Flourishing & Engagement

• Ginger Ambler, co-chair
• Suzanne Raitt, co-chair
• Babs Bengston
• Henry Broaddus
• LaTryce Butler
• Aida Campos
• Kelly Crace
• Adam Ferguson

• Abigail Grimes
• Berni Kenney
• Calandra Lake
• Chris Lee
• Sue Manix
• Jeremy Martin
• Mariellynn Maurer
• Barb Ramsey
External Scan Themes
Internal Scan Themes
Phase III

STRATEGY DEVELOPMENT
Phase III: Focusing / Filtering

• A joint effort of the President’s Cabinet and the Strategic Planning Subcommittee

• First task: develop framing assumptions (i.e., problem statements) based on Phases I and II
  – What are the critical factors within which W&M must act strategically?

• Meet the established goals for the plan
Next Steps: Ongoing Engagement

• Next Forum: The City of Williamsburg as a Key Partner, February 12, 3:30 p.m.

• Engagement by depts. and assemblies, Jan. 30 to Feb

• Participate anytime via www.wm.edu/strategicplanning