

Ad Hoc Committee on Organizational Sustainability & Innovation

February 6, 2020



WILLIAM & MARY

CHARTERED 1693

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

Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May
	4	24-26 1	7 20-22	10		30 5-7 12	4	8 22-24	
Phase I: Vision, Mission, Values SPSC Responsibility									
	Phase II: Environmental Analysis SPSC Responsibility								
						Phase III: Strategy Development Cabinet and SPSC Collaboration			

Fall 2019

Community Forums:

- ✓ Sep. 4
- ✓ Oct. 1
- ✓ Nov. 7
- ✓ Dec. 10

Spring 2020

Community Forums:

- ✓ Jan. 30
- Feb. 12
- Mar. 4
- Apr. 8

BOV Meetings/

Community Updates:

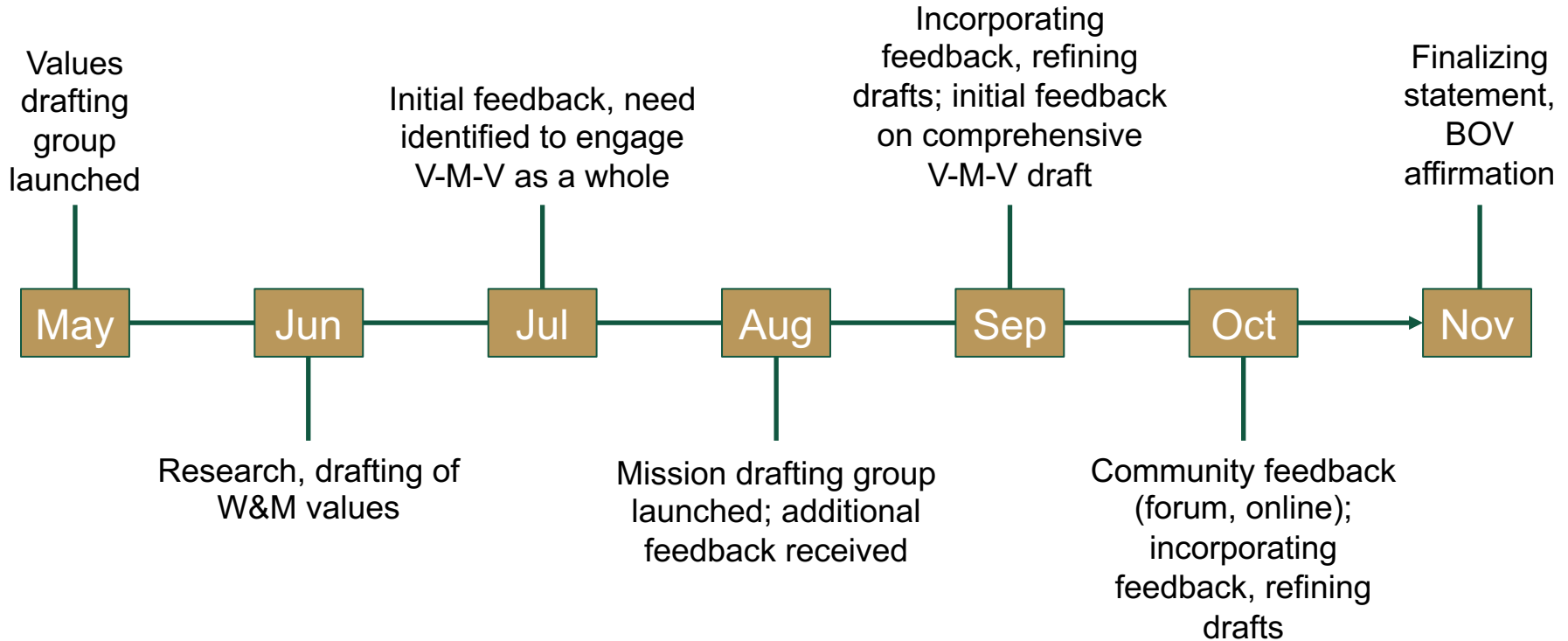
- ✓ Sep. 24-26
- ✓ Nov. 20-22
- Feb. 5-7
- Apr. 22-24

Phase I

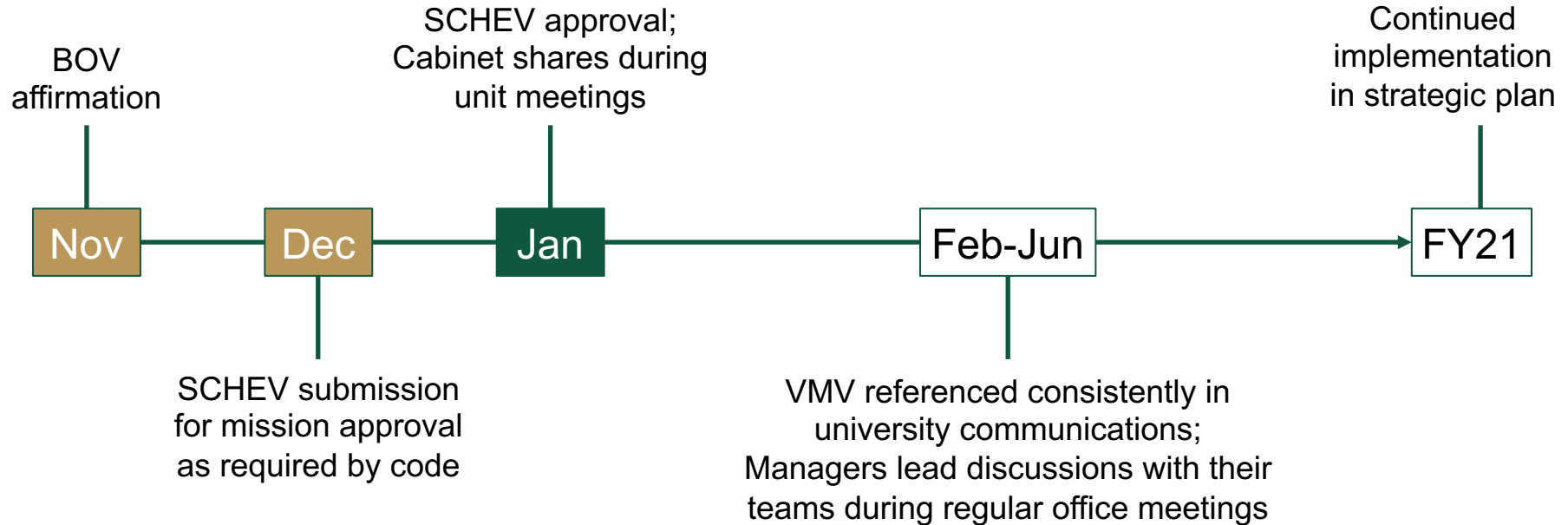
VISION, MISSION, VALUES



Phase I: Complete



Implementing Vision, Mission, Values

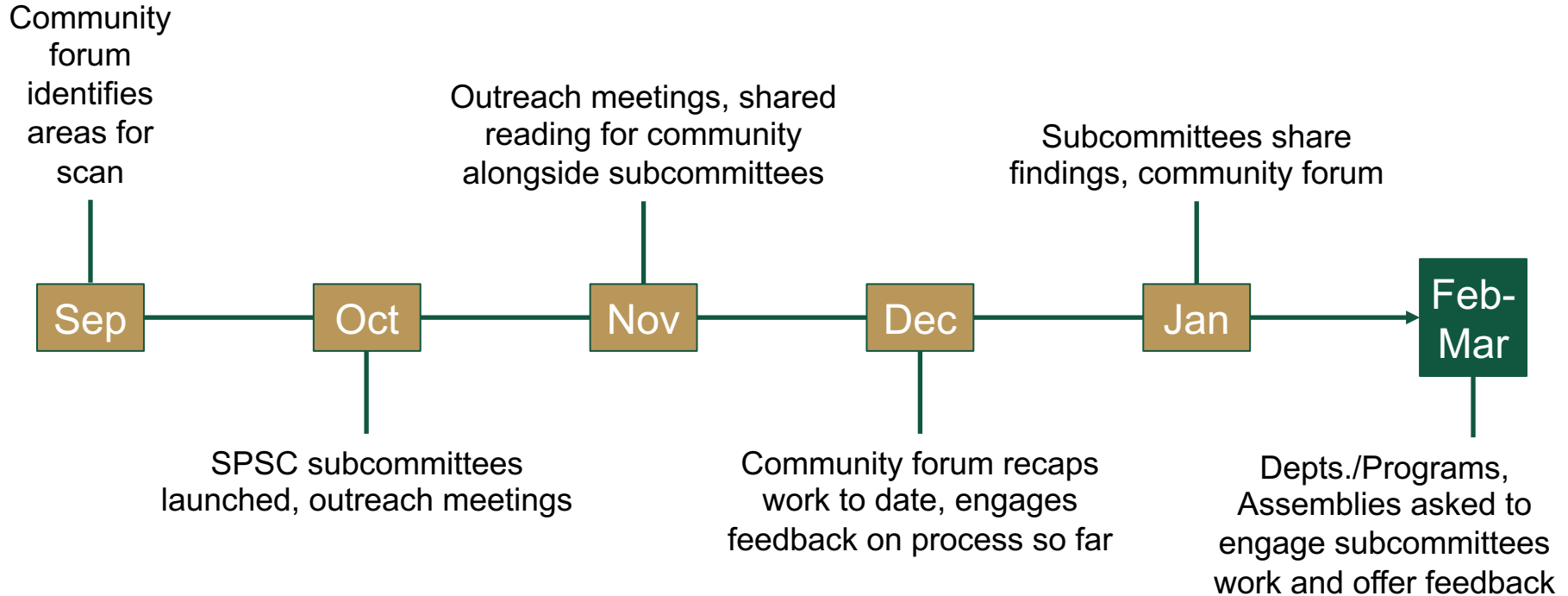


Phase II

ENVIRONMENTAL ANALYSIS



Phase II Timeline



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

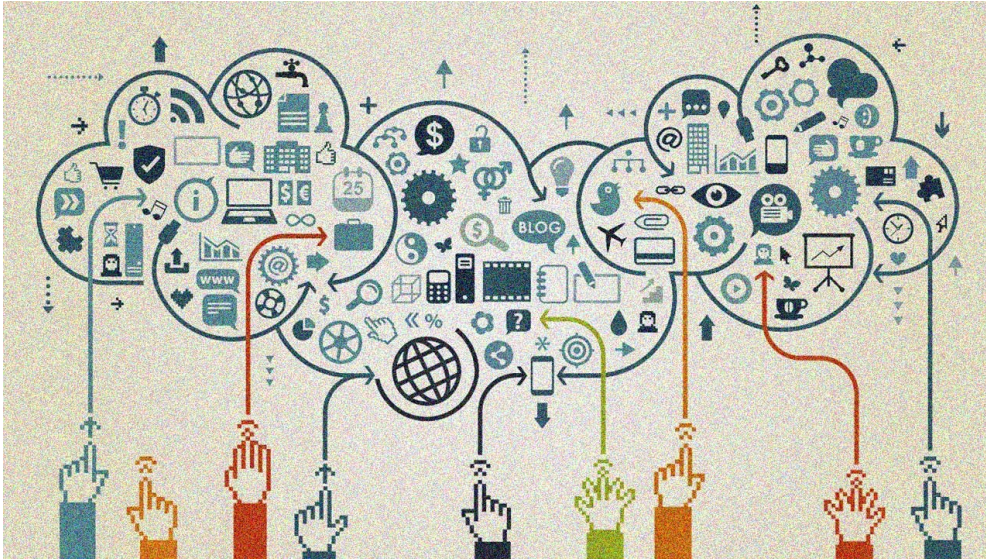
- Carl Friedrichs, VIMS, *co-chair*
- Amy Sebring, Fin. & Tech., *co-chair*
- Layla Abi-Falah '17, J.D. '20
- David Armstrong, Physics
- Sara Belmont, University Libraries
- Dan Cristol, Biology
- Dave Douglas, Law
- Mike Foradas, W&M Foundation
- Lynne Fors, University Libraries
- Roz Hargraves, W&M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

Leading R&I institutions

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