Strategic Planning 2019-20

Joint Board Meeting Update
January 28, 2020
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

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**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 Timeline

- **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
See www.wm.edu/mission to review the statements and watch the videos.
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**: SPSC subcommittees launched, outreach meetings
- **Oct**: Community forum identifies areas for scan
- **Nov**: Outreach meetings, shared reading for community alongside subcommittees
- **Dec**: Community forum recaps work to date, engages feedback
- **Jan**: Subcommittees share findings, community forum
- **Feb**: Launch Phase III: Developing Strategies
A Framework for Scanning

• Subcommittees launched based on community feedback in:
  – Teaching & Learning
  – Research & Innovation
  – Flourishing & Engagement

• Each subcommittee applied at least five lenses for scanning:
  – Diversity & Inclusion
  – Global
  – Resources
  – Sustainability
  – Technology

• Respective subcommittee added additional lenses appropriate for their work
Subcommittee Work Products

• Expanded engagement:
  – Added 3-5 topical experts from community as subcommittee members
  – Conducted at least 10 outreach meetings with relevant university groups

• Suggested readings for community
  – Shared in mid-November via www.wm.edu/strategicplanning

• Report
  – 5-page white papers and a bulleted executive summary
Click here to review the subcommittees’ white papers and executive summaries.
Teaching & Learning

Cherished Principles of W&M’s Approach

– Collaborative teaching and learning across boundaries
– Research-based teaching and learning
– Personalized mentoring
– Global and experiential learning opportunities
Teaching & Learning

Trends in Higher Education

– Changing demographics
– New educational technologies and curriculum delivery
– Challenges to the reputation of higher education
Teaching & Learning

Opportunities for Change and Ongoing Challenges

– Barriers to collaboration: breaking down silos
  • Online learning
  • Curricular innovation, joint programs and interdisciplinary centers
  • Strengthening external connections
– Improving infrastructure and support
– Domestic and global awareness and inclusivity
Characteristics of Leading Institutions

- A culture that allows for and promotes measured experimentation and risk-taking
- Focused leadership that can bring together individual efforts and synergies
- An environment that fosters pan-organizational thinking and avoids silos
- Collaborations with industry partners, governmental entities, nonprofits, and other institutions of higher education
- Differentiating areas of knowledge and expertise
- Infrastructure and support structures to facilitate the work
Research & Innovation

Emerging themes to build sustained strength in the areas of research and innovation at William & Mary

1. Reducing silos will be essential to W&M’s success
2. Differentiating W&M from other institutions will be important
3. Current infrastructure and administrative support structures are insufficient
4. Balancing teaching and learning with research and innovation will be challenging
Flourishing & Engagement

External Scan Themes

– Changing demographics
– Diversity and belonging
– Sustainability
– Financial uncertainty
– Accountability, transparency, value for money
– Changing role and perception of higher education
– Developments in technology
– Wellness
Flourishing & Engagement

Internal Scan Themes

– **Belonging**: concerns expressed about gaps, both experiential and structural, within and between different communities on campus

– **Flourishing**: balancing productive challenges in the workplace and the academic setting and the need for flexible, supportive structures and policies
Phase III
DEVELOPING STRATEGIES
Key Aspects of Phase III

• 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
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