W&M STRATEGIC PLANNING

REFLECTION ➔ VISION ➔ FOCUSED ACTION

Board of Visitors
February 2021
Strategic Planning 2020-2021

1. Where We Were
2. What We Have Learned
3. 2020: Planning Goals and Scope
4. 2021-24: Flourishing Post-Pandemic
5. Process Recap: Phases I and II
6. Phase III, Spring 2021
   - Reflection: What We Already Know / How Have We Changed?
   - Vision and Focus: Flourishing Post-Pandemic
   - New component: AY21-24 Action Plan
7. Phase III Timeline
Where We Were

- **Phase I**: Refine William & Mary’s vision, mission and values statements
- **Phase II**: Scan current and future transformations affecting higher education and share that scan broadly to increase the community’s understanding of the opportunities and challenges we face
- **Phase III**: Establish focused strategic goals for the coming 5-10 years
What We Have Learned

What we already knew has much more impact and value now
We must act much more quickly on what we know to be true
We can act swiftly in a principled, mission-driven way
To use the extraordinary efforts and changes of pandemic well, we must determine:

• *How have we changed? How have we matured?*
• *What do we want to continue? What do we lay aside?*
2020: Planning Goals and Scope

**Original Goals**
- Advance W&M'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 our distinctive academic mission

**Original Scope**
- 5-10 years
- Respond to changes in how we learn, work, build community in the 21st C.
- Focused priorities
- Whole-university thinking: actions that advance the whole
- Shape the next campaign
Process Recap

Phase I: Mission, Vision, Values
- 10-month W&M campus and community engagement
- New Mission, Vision, Values Statements crafted
- Approved by Board of Visitors November 22, 2019, published
- Approved by SCHEV January 2020
- These have proved a powerful guide for W&M through unprecedented challenges of pandemic

Phase II: Environmental Scan
- Strategic Planning Steering Com. (SPSC) studies, publishes whitepapers
  - Three areas of focus: Teaching & Learning; Research & Innovation; Flourishing & Engagement
  - Five lenses: Diversity & Inclusion; Resources; Global; Technology; Sustainability
- Community playback and feedback
- **SPSC publishes 13 framing assumptions** to guide strategy development in Phase III, to be led by Cabinet
Expanded Goals

• Advance W&M'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 our distinctive academic mission

• Gain positive momentum from W&M's effective pandemic response

Long-Term Vision / Near-Term Action

• Vision: W&M 2030

• Focus: university-level priorities to swiftly advance W&M as a whole

• Shape the next campaign

• New 3-Year Action Plan: optimize what we have learned, surmount short-falls, launch with focus and speed
Phase III: Key Questions

How will it be? What will our community need at the end of the marathon? Potential needs include ...

- Recovery and healing
- "Roaring 20's" return to social life
- "Post-war" transformation of the U.S. workforce and workplaces, via telework
- In-person and place-based matter differently, used differently
- Higher expectations of equity, wellness, anti-racism, environmental stewardship
- Higher urgency for civic education, to sustain democratic institutions

How does W&M turn the momentum of pandemic transformation into long-term advantages for our community?

- Rapid transformation across the institution led to unprecedented success in crisis
- Increased ability to create intimacy, community, via remote platforms
- Increase in applications
- For Liberal Arts & Sciences, new prominence in health sciences, data analytics, questions of ethics and equity, African American history, technology and communications
- Research and evidence-based action shown to be essential in all walks of life and all sectors of the economy
Phase III: Spring 2021 Process

**Reflection**: reconvene SPSC's subcommittee chairs
- Pandemic stress-test: revisit whitepapers, framing assumptions
  - How have our assumptions been proven, disproven, changed?
  - How have we changed?
  - How have we matured?
  - What changes do we want to continue?
  - What do we want to lay aside?
- Community conversations, playback

**Focus**: Cabinet revises assumptions in re playback
- *What do we already know that we must take swift action on?*
- *How have we changed in ways that will help us flourish long term?*

**Vision**: President and Senior Team
- Shape vision in consultation with Cabinet and Board
- Shape the next Campaign

**Launch Vision 2030 with AY21-24 Action Plan**
- Strategic vision and priorities published, with near-term actions to launch AY21-24
- Cabinet implements near-term strategic priorities aligned with long term vision
<table>
<thead>
<tr>
<th>Mar</th>
<th>Apr</th>
<th>May</th>
<th>Jun</th>
<th>Jul</th>
<th>Aug</th>
<th>Sep</th>
<th>...and beyond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reflection:</td>
<td></td>
<td>Playback:</td>
<td>Cabinet shares revised assumptions for comment</td>
<td></td>
<td></td>
<td>Cabinet shares revised assumptions for comment</td>
<td></td>
</tr>
<tr>
<td>white papers and framing assumptions revisited via Community Conversations</td>
<td></td>
<td>Cabinet reviews campus and community feedback, refines and finalizes for publishing to the W&amp;M community</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cabinet reviews, sets near-terms strategic priorities; presentation to BOV, strategic priorities published</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cabinet implements strategic plan; Capital campaign planning begins</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>