



WILLIAM & MARY

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W&M STRATEGIC PLANNING

REFLECTION → VISION → FOCUSED ACTION

Board of Visitors

February 2021

Strategic Planning 2020-2021

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 - **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

Aug	Sep	Oct	Nov	Dec	Jan	Feb	Mar	Apr	May				
Phase I: Vision, Mission, Values SPSC Responsibility						COVID-19: Strategic Planning Paused							
	Phase II: Environmental Analysis SPSC Responsibility												
						Phase III: Strategy Development Cabinet and SPSC Collaboration							

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

Phase III: Flourishing Post-Pandemic

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

Phase III Timeline

Mar	Apr	May	Jun	Jul	Aug	Sep	...and beyond
	Reflection: white papers and framing assumptions revisited via Community Conversations	Playback: Cabinet shares revised assumptions for comment					
	Cabinet reviews campus and community feedback, refines and finalizes for publishing to the W&M community						
			Cabinet reviews, sets near-terms strategic priorities; presentation to BOV, strategic priorities published				
						Cabinet implements strategic plan; Capital campaign planning begins	