Key BOV Actions This Fall

- July: Draft
- Aug: OpSix mtg
- Sept: BOV action

W&M Strategic Plan

- Sept: BOV endorses high level priorities

State Six-Year Plan

Affiliated Investment Plan

- Sept: Request BOV action to establish quasi-endowment
W&M Vision 2026

1. Advance W&M's distinctive excellence to raise our profile in a rapidly changing world
2. Create long-term financial sustainability and an operational model matching the caliber of W&M’s educational enterprise
3. Capitalize on positive gains from our effective pandemic response to propel W&M forward
Planning Themes

1. **Clarity**: a simple set of university-level priorities that advance W&M as a whole
2. **Urgency**: swiftly evolve our areas of strength and grow new strengths to compete
3. **Capacity**: enhance student outcomes, guide partnerships, shape the next campaign
4. **Data**: use it thoughtfully
Planning Timeline

 ✓ **2019-20** Broad W&M community input, focus groups and playback
 ✓ **Spring 2020** Environmental Analysis & Planning Assumptions published
 ✓ **Spring 2021** Planning restarted: W&M reflection, commentary, playback
   • **Sept. 2021** *W&M 2026* priorities set by president and Cabinet, approved by Board; based on the above analysis and feedback
   • **Sept.-December 2021** 5-Year action planning by units and programs, relative to analysis, assumptions and *W&M 2026* priorities
 • **January-June 2022** 5Y Plans reviewed by Cabinet leads; resourcing as Cabinet leads determine
 • **2022-2026** Expanded objectives and actions based on 5Y Plans; ongoing implementation, evaluation, and refinement
Components

Foundational Principles
- Mission, Vision, Values & Principles
- Environmental Scans, Data Gathering, Planning Assumptions
- Broad W&M Community Input, Focus Groups & Playback

High Level Priorities
- Priority 1
- Priority 2
- Priority 3

Objectives
- Objective 1
  - + Objectives from 5Y Planning
- Objective 2
  - + Objectives from 5Y Planning
- Objective 3
  - + Objectives from 5Y Planning

Actions, Initiatives & Projects
- Action 1.A
- Action 1.B
- + 5Y Planning Actions

Measures
- Measure 1.A.a
- Measure 1.A.b
- Measure 1.A.c
- Measure 1.B.a
- Measure 1.B.b
- Measure 1.B.c

Actions, Initiatives & Projects build out for all Objectives, via unit-level planning

2019 to 2022-26

We are here
Fall 2021 5Y Planning
2022
Priorities / Objectives

**Educate for Impact**
- Expand access to a W&M education
- Spur innovation across disciplines
- Design meaningful pathways for future career success

**Expand W&M’s Reach**
- Strengthen W&M’s research ecosystem
- Model democratic ideals of service and civil discourse
- Forge worldwide connections

**Evolve for Excellence**
- Champion sustainability
- Set the national standard for DEI
- Achieve operational excellence

In Process – Cabinet is at work filling in top priorities and initial actions. Will provide the framework for campus to engage in 5Y planning.