



WILLIAM & MARY

CHARTERED 1693

STRATEGIC PLANNING 2019-20

BOV Retreat -- July 24, 2019

CONTENTS

- Strategic Planning Overview
- W&M Core Values
- Ad Hoc Committee

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

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

A VALUES-DRIVEN PROCESS

- “We change to advance what we value most”
- Vision, Mission and Values at the core
- Instilling a continuous strategic management approach



A COLLABORATIVE PROCESS

Committee

- 24 members, broadly representative
- Solicit, filter and prioritize ideas from community
- Evaluate input, prioritize initiatives to propose a framework and goals

Cabinet

- 25 members, 9 on the Strategic Planning Steering Committee
- Review and validate the recommendations of the Comm.
- Makes affirmative recommendations on strategy to the president

PHASES OF PLANNING

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

DISCUSSION

- Are any key elements of planning missing?
- Is our intended process aligned with the expressed desires of the Board and community from the past year?



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WILLIAM & MARY CORE VALUES

Ginger Ambler, Vice President for Student Affairs
Chon Glover, Chief Diversity Officer

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THE CHARGE



COMMITTEE MEMBERS

- **Ginger Ambler** and **Chon Glover**, Co-Chairs
- **Michael Halleran**, Provost
- **Heather Golden**, Advancement
- **Jamie Settle**, Government Faculty
- **Brendan Boylan '19**, Former SA President

OUR WORK



DRAFTING PRINCIPLES

- Buzzwords should be avoided
- Values ought to resonate with faculty, staff, and students
- Values are not listed in a “priority” order (alphabetical/not hierarchical)
- Active verbs will drive the document
- Claim unique territory – “Does it sound like W&M?”
- Bring forward durable language from key W&M documents

SHARING THE DRAFT



CORE VALUES OF W&M



DISCUSSION

1. What resonates for you?
2. What does not resonate for you?
3. Is something missing?
3. Thoughts on the structure?

AD HOC COMMITTEE FOR INSTITUTIONAL SUSTAINABILITY & INNOVATION

Operating Model vs. Financial Model

Operating Model aligned with Financial Model

AREAS OF FOCUS IN 2019-2020

- Strategic Planning
- Capacity Building
- Diversity & Inclusion

DISCUSSION

- Are there other areas of focus that require the ad hoc committee's attention?
- How can we make the ad hoc committee most effective in the coming year?