

Strategic Planning 2019-20

Joint Board Meeting Update
January 28, 2020



WILLIAM & MARY

CHARTERED 1693

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

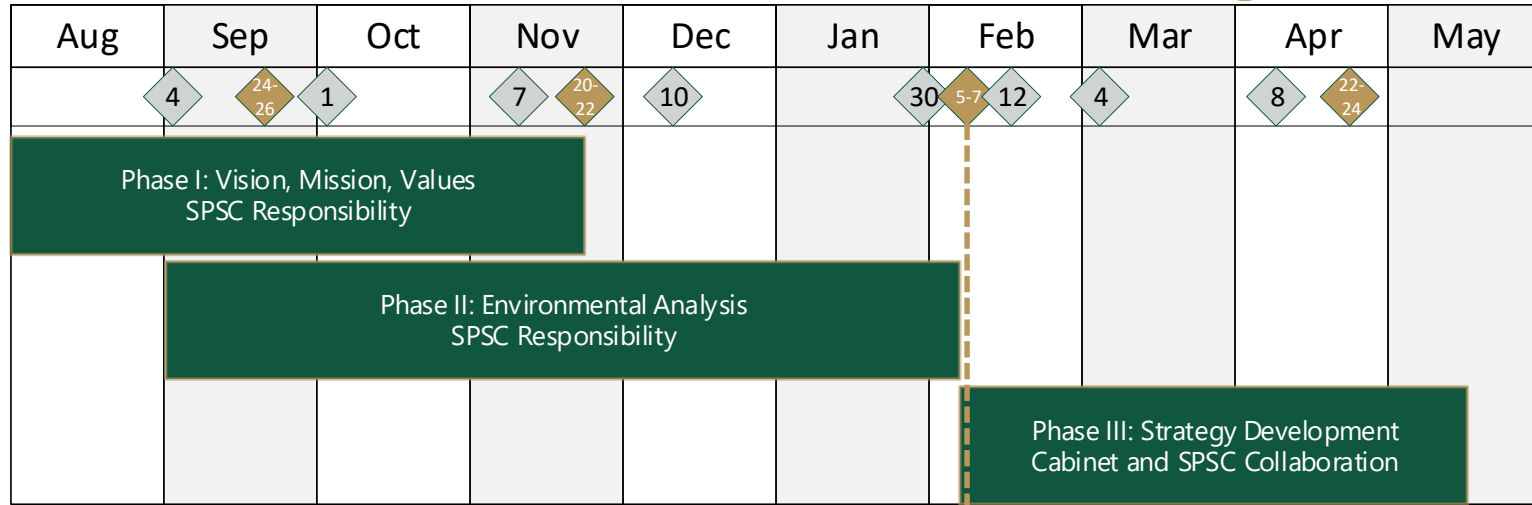
- Advance a whole-institution mindset throughout W&M
 - Create greater shared understanding of the opportunities and challenges over the coming decade
 - Reinforce our shared responsibility for cultivating opportunities and crafting solutions
- Embolden our community to embrace our history of innovation
 - 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



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:

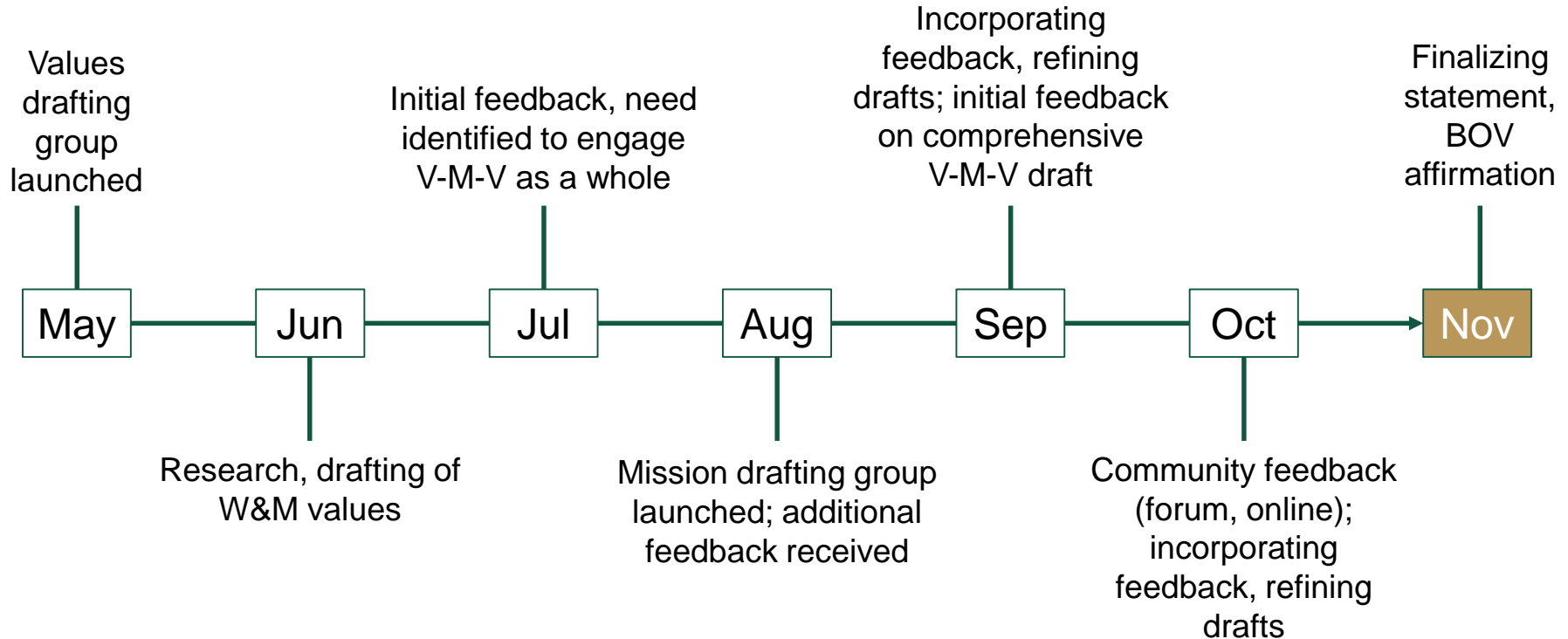
- Sep. 24-26
- Nov. 20-22
- Feb. 5-7
- Apr. 22-24

Phase I

VISION, MISSION, VALUES

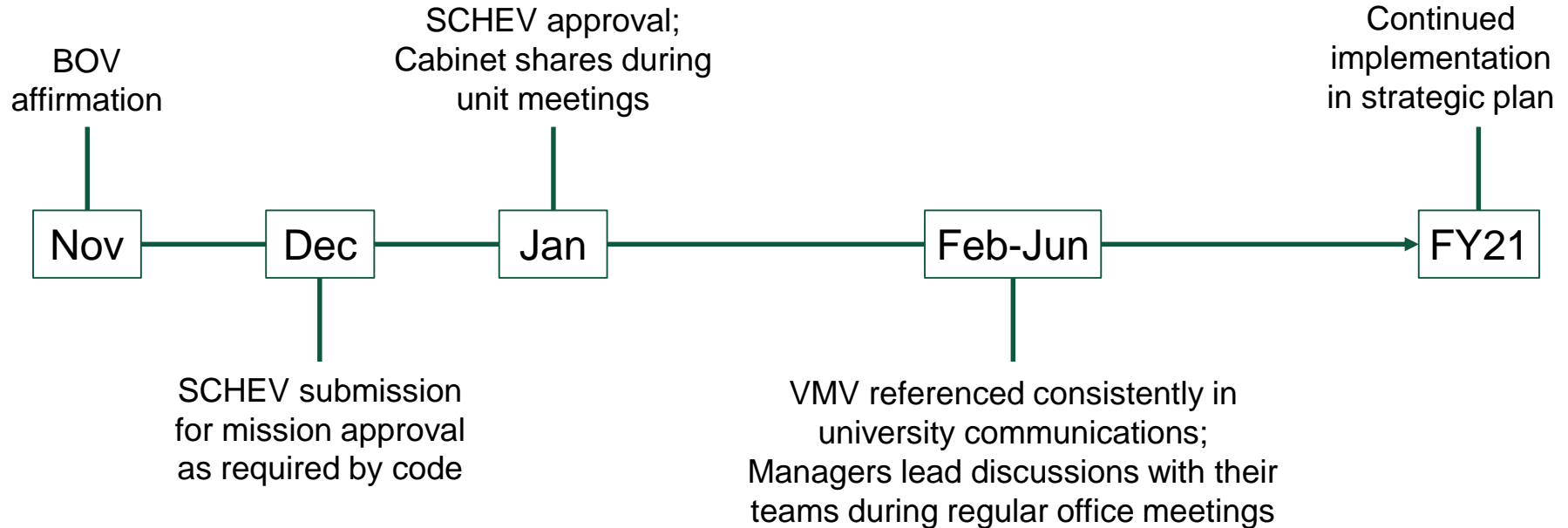


Phase I Timeline



See www.wm.edu/mission to review the statements and watch the videos.

Implementing Vision, Mission, Values

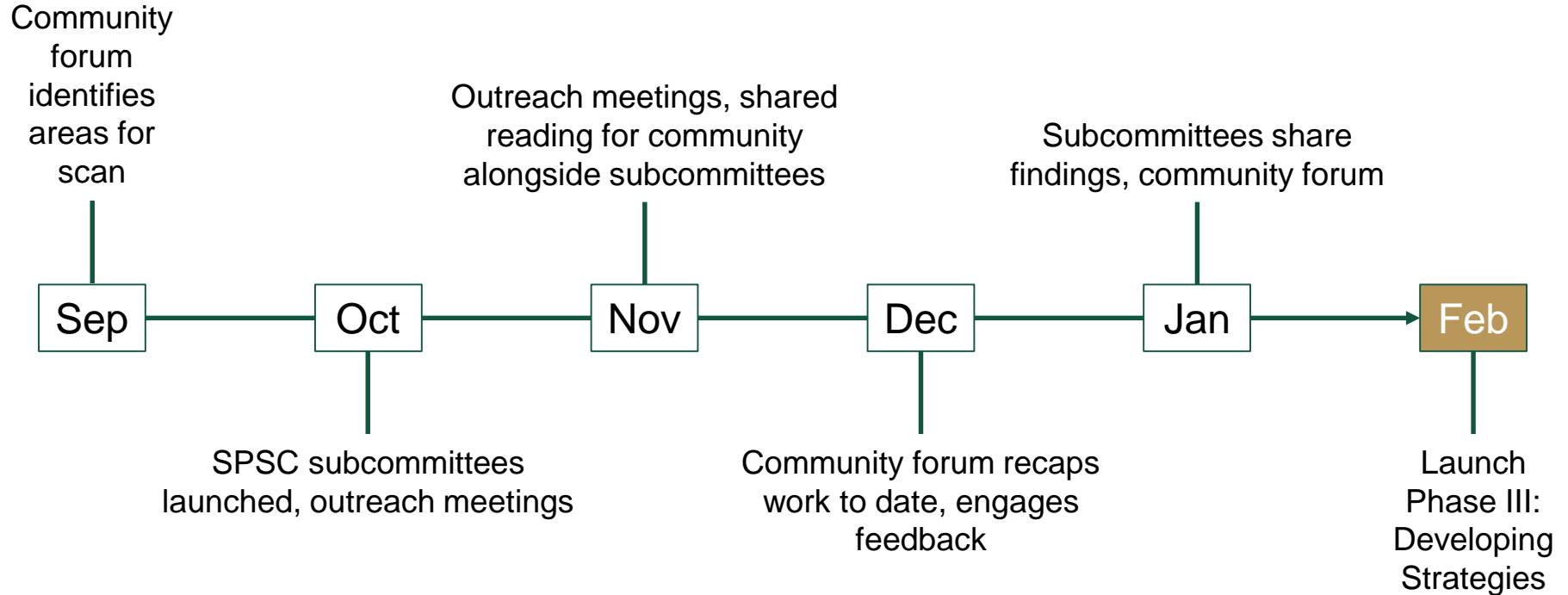


Phase II

ENVIRONMENTAL ANALYSIS



Phase II Timeline



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

Research & Innovation

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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