

www.wm.edu/strategicplanning

Committee on Strategic Initiatives

Strategic Planning Update

November 20, 2008

BOV Discussion Plan

Thursday 2:30-3:20 -- Committee on Strategic Initiatives

Update on planning process

Overview of challenge discussions

Discussion of draft vision

Committee discussions of challenges

Friday morning board meeting

Discussion of challenges

Where we are headed -- Draft plan outline

April – 10-12 pages plus enclosures

- **Vision**
- **Peer comparisons**
- **Baseline budget projections**
- **6-8 Opportunities/Challenges**
 - **Define the opportunity/challenge and why it is important now**
 - **List goals, measurable objectives, and budget impacts**

After BOV approval distill core messages and disseminate in various forms focused on specific target audiences

Planning Sequence

- **Sep -- Initial BOV Discussion**
- **Sep-Nov -- Planning Steering Committee (PSC) Discussions**
- **Nov -- Discussions with BOV**
- **Dec -- PSC recommends vision and 6-8 opportunities to Provost and President**
- **Jan- end Feb -- Deans, VPs, Program Heads propose responses to 6-8 opportunities/challenges**
- **Feb – Discussions with BOV**
- **Mar -- PSC drafts 10-12 page plan, Provost and President review**
- **Apr – Discussions with BOV – approval and dissemination**

Planning Steering Committee – Fall 2008

7 meetings – review benchmark data and draft vision, develop and implement outreach plan, draft 14 preliminary challenges for further discussion

Outreach completed:

- **Faculty – 10 meetings – 200 participants – > 300 survey responses = 64% participation rate**
- **Staff – 8 meetings – 200 participants**
- **Students – 5 meetings**
- **Alumni – 6 meetings – 100 participants – > 450 web and e-mail responses + Research underway**
- **Parents – 1 meeting – 30 participants – > 200 web responses**
- **Advisory boards – 5 meetings -- >100 participants**

Discussion Process

Challenges -- Janet Brashear

Committee Assignments

Board Discussion on Friday Morning

Draft Vision

Background

Sections

Evolution

Overview

Research and Professional

Teaching

Community and Engagement

Financial Foundation

The Challenge

Importance

Discussion

[Evolution] The story of the College of William & Mary is the story of our country – beginning nearly 100 years before its founding and continuing powerfully into the 21st century. Over the centuries, William & Mary has risen from the scourge of wars and the ravages of economic loss. It has come to stand among the most academically distinguished institutions of higher education in the United States.

[Overview] William & Mary is a residential university with human scale, a place of genuine community where people are known by name and collegiality is the norm. Our faculty is highly accomplished, our students are among the most able in the country, and our staff is dedicated. Our student-faculty ratio supports highly interactive teaching, and both faculty and students join enthusiastically in learning and scholarship. William & Mary is a place for people seriously interested in the pursuit of knowledge.

[Research and Professional] We are a research university with national and international aspirations. We value the creation and dissemination of knowledge equally. We are a community of scientists, poets, scholars and artists and many of our faculty are recognized leaders in their chosen fields. They work at the cutting edge of the worldwide effort to expand human horizons, to promote a deeper and more comprehensive understanding of the human condition, and they are part of the international adventure of scientific discovery.

[Teaching] Ever at our core is a superb undergraduate program, focused on the liberal arts, complemented by select graduate and professional programs. Our students are taught by faculty who are deeply committed to teaching and masters of their craft. Teaching is a passion for them, and it is central to our identity. To an extraordinary degree, our undergraduate students do research alongside their faculty mentors. We emphasize individual inquiry and urge all of our students to pursue learning that furthers their personal interests and aspirations. Our students come to us wanting to change the world. They leave with the skills to do it.

[Community and engagement] Our community of students, faculty and staff comes from varied racial, religious, geographic and socio-economic backgrounds. We engage one another from different perspectives and learn from each other. We want gifted people from all areas to have equal access to our community, and we value diversity because we understand its value in promoting richer and deeper understanding. We value international study, research and teaching and we need to become more international in our understanding and reach. To an unusual degree among colleges and universities, we are engaged already in service on campus, in our community and country, as well as abroad. We seek to build on that foundation, to continue as a national leader in service learning and engaged scholarship, and to demonstrate to our students the power of knowledge.

[Financial Foundation] Our preeminence rests on a fragile financial foundation. For economic reasons, William & Mary welcomed state ownership early in the last century, having been private for over 200 years. State support remains very important to us and we value our role as a public university, but state funds alone can no longer sustain our excellence. We can and must see to our own financial future.

[The Challenge] William & Mary welcomes the manifold challenges of being one of the country's leading liberal arts universities. We expect this century to be the most productive and acclaimed in the College's storied history.

1. Insure the integrity of liberal arts education at W&M. Become an international leader in the development, implementation and dissemination of innovative models for the liberal arts university in the 21st Century. Ac Aff
2. Develop a research model that promotes and supports growth, innovation, and excellence in discipline-based and interdisciplinary research, on its own merits and with students at all levels, as an integral aspect of W&M's commitment to liberal arts education. Academic Affairs
3. Transform W&M from a national university that welcomes international experiences to an international university that views global competence and engagement in the worldwide creation and dissemination of knowledge as central elements of its mission. Academic Affairs
4. Maintain our current size and favorable student-faculty ratio to sustain high levels of faculty student collaboration and to sustain and enhance the intellectual community that derives from authentic interpersonal connections and relationships in and outside of the classroom and an appropriate balance of academic and co-curricular activities. Buildings/Grounds
5. Position our professional programs to be nationally competitive and essential to the College's reputation and prestige while functioning as full participants in the intellectual life of the College. Financial Affairs
6. Assure that W&M is the university of choice for the best pre- and post-baccalaureate students in the Commonwealth who are interested in the unique environment of a research university grounded in the liberal arts. Academic Affairs
7. Be a national leader in utilizing the knowledge and intellectual capacity of the university to inform civic engagement, institutional outreach, and economic development. Financial Affairs
8. Be a community committed to cultural pluralism, intellectual freedom and diversity. Administration
9. Enlarge our sense of community and institutional pride to ensure that students experience the joy of belonging to a place of great accomplishment, learning, and personal development and leave as alumni with both gratitude and continuing commitment to W&M. Administration
10. Assure that the in- and out-of-class environment is purposely designed to fully engage students, to support the academic enterprise, and to maximize student learning and personal development. Administration
11. Establish a financial model for the College that utilizes, integrates and maximizes multiple revenue sources and prioritizes expenditures in a manner that financially sustains the academic enterprise, student experience, and necessary institutional infrastructure and support functions. Establish a culture of giving beginning in a student's freshman year through his/her lifetime. Financial Affairs
12. Adopt and adequately resource best practices in managing and operating institutional support functions including workforce development and investment in the staff, equipment, and information systems that increase efficiency and manage risk while supporting the College's academic and research missions. Admin
13. Construct, operate and maintain a physical plant that provides adequate infrastructure for the College's academic, research, student life, and public service missions while optimizing sustainability, resource conservation, efficiency, aesthetics and accessibility. Buildings and Grounds
14. Implement communications, marketing and branding initiatives that provide clear, focused, consistent messages and unite the various College constituencies in support of strategic priorities. Financial Affairs