



Strategic Planning

Past, Present, Future

October 5-6, 2018

Context

UWC-USA has undertaken a number of strategic initiatives, with the result:

1. UWC-USA has been planning for at least 11 years, with strategic plans in various stages of development
2. Strategic planning began in earnest again last year and has subsequently stalled
3. The master plan is primarily driving direction & activity, with some progress made on certain instances through work of the campus strategic committee

“Why?” remains a question:

1. Lack of will?
2. Lack of money?
3. Multiple changes in leadership & direction?
4. Is the foundation not yet strong enough to take on change?
5. Questionable return given school’s mission?
6. All the above?

To Determine Why: Engaged the following Methodology

1. Reviewed a number of documents

- a. UWC Mission, Values, Principles
- b. UWC Strategy - 2018 & Beyond
- c. UWC-USA 2007 Strategic Plan
- d. UWC-USA 2016 Strategic Vision
- e. UWC-USA 2017-2020 Strategic Vision
- f. UWC-USA 2013-2018 Strategic Planning Documents
- g. UWC-USA 2017 Strategic Planning Documents
- h. UWC-USA Master & Landscape Planning Documents
- i. UWC-USA 2018 Board Chair & President Strategic Directional Document

2. Worked with Strategic Leadership Team (SLT)

- a. Interviewed Each Member for Historical Insight
- b. Conducted Audit of Existing Systems & Practices
- c. Identified & Confirmed Practices, Needs, & Opportunities

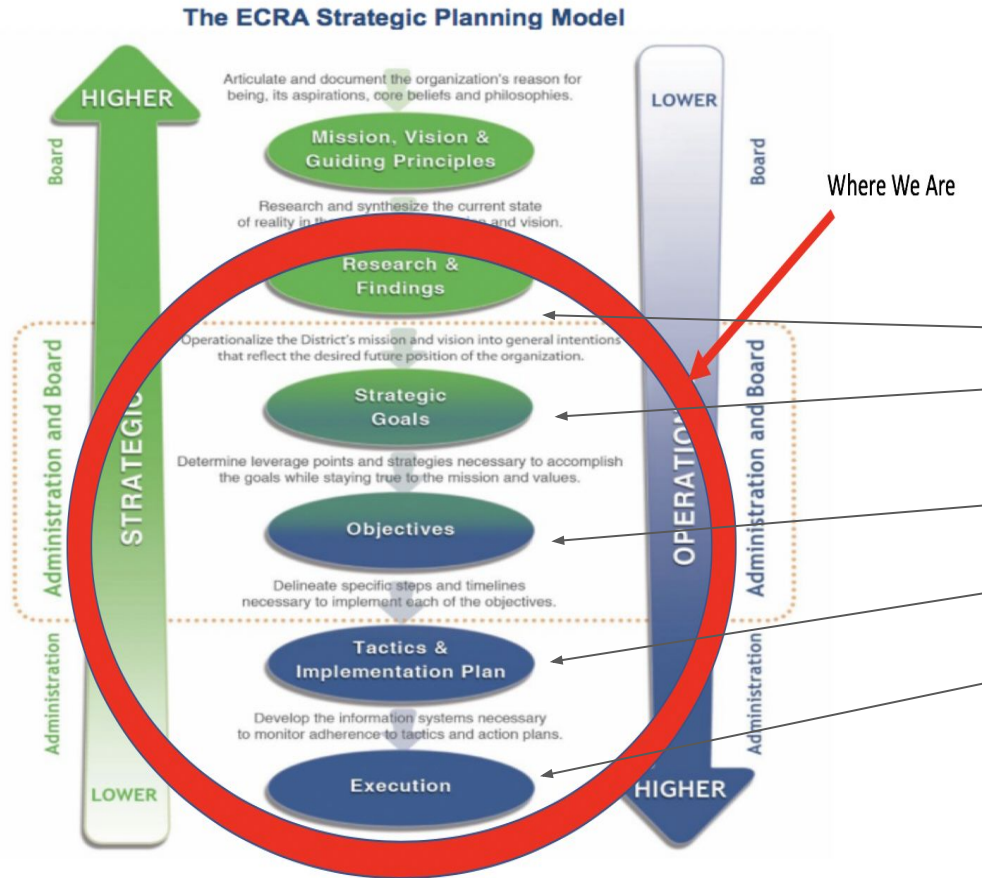
3. Interviewed Board Chair & President

- a. Institutional Strengths & Challenges, Macro Challenge

4. Participated in Master Planning Meetings

- a. Learned Various Options & Aligned costs

Then we placed findings in the Context of this Approach



Findings:

There is little disagreement on UWC mission, values, principles. But as the chart evidences, if we are to develop, implement, and operationalize a strategic plan to push forward the mission, values, and principles, we need to address the following:

- 1. Research & Findings (Data)**
To inform decision making
- 2. Board Goals**
To provide general intention
- 3. Strategic Objectives**
To guide activity
- 4. Tactics & Implementation Plan**
To operationalize the goals & objectives
- 5. Execution**
To achieve goals by ensuring the right people are engaging the right systems and practices in promotion of specific programs in a particular place and measuring progress against such.

Diagnosis: Situational Analysis & Challenge

In spring 2016, you were presented with a vision for:

- a. Mission Alignment
- b. Financial Sustainability
- c. Signature Programs

In spring 2017, you were presented with school objectives to strengthen the foundation -- which left us with a realization that we have two macro challenges:

1. Strengthening Foundation

- a. Strengthen the culture and capabilities of UWC-USA (audit of people, places, programming, and practices)
- b. Manage finances within current capability (zero based budgeting, compensation study, insurance, retirement, etc.)
- c. Develop small organic innovations to improve campus life, curriculum, and experiential education
- d. Bring to close outstanding projects (hot springs, water pumps, emergency mgmt, etc.)

2. Innovating for Impact

- a. Strategic Innovations & Targeted Investments
 - i. Advancing the Mission
 - ii. Reshaping the Campus Experience
 - iii. Positioning UWC-USA as Enduring Leader in International Education
- b. Fundraising & Endowment Building
 - i. Transformed & Transformative Educational Institution
 - ii. Take Advantage of Place, Population, & Programming
 - iii. Placed-based Agency

Addressing the Macro Challenge

Several steps need to be undertaken to address the Macro Challenge, in order to ensure that the scale and scope of the strategy is not only aligned with the level of ambition but can be achieved in a timely manner.

1. Research & Findings (Data)

- a. Determine if UWC-USA currently possesses the data needed to make informed decisions, and if not how best to acquire the data
- b. Identify options for achieving & sustaining aspirational goals, and assign cost-benefit to each
- c. Determine the best return on investment

2. Strategic Goals

- a. Accept the alignment between UWC-USA and the UWC mission, values, principles, etc.
- b. Develop a set of Board Goals & Objectives for UWC-USA to guide the work of this particular institution
- c. Draft a set of board goals & objectives for review, modification, and approval

3. Objectives

- a. Develop a short-term framework of action that strengthens the foundation by addressing current projects & needs
- b. Develop an intermediate-term framework that engages stable & sustainable programs, systems, and practices
- c. Develop a long-term framework that achieves aspirational goals

4. Tactics and Implementation Plan

- a. Create a 3-5 year roadmap to visualize the action plan
- b. Engage tactics that address both foundation needs and aspirational goals for this institution
- c. Ensure implementation takes place within a 3-5 year timeframe

5. Execution

- a. Engage the Strategic Leadership Team (SLT) so to develop a detailed strategic plan
- b. Require SLT work with respective departments to articulate their goals/objective
- c. Operationalize the plan by having departments present their own roadmaps - with associated timelines & costs to SLT for approval

Board Goals & Strategic Objectives

1. Create a safe, inclusive, and respectful environment for staff, faculty, and students built around personal responsibility and accountability.

Strategic Objectives:

- a. Invest in programs that promote diversity within the student body.
- b. Invest in programs to encourage safety, trust, effort, and a positive, mission-driven culture among faculty and staff, including through compensation and workload management.
- c. Execute a Master Plan aligned to a campus that best provides a living model of a sustainable community committed to intercultural understanding.

2. Create an excellent, innovative, and expansive educational environment built around highly-qualified faculty, robust professional development and training, and aligned programs that integrate academic rigor, experiential education, and residential living.

Strategic Objectives:

- a. Invest in the recruitment and professional development of staff and faculty.
- b. Rebalance IB, experiential, and residential programming to better align with the UWC mission.
- c. Incorporate flexible and collaborative learning environments to promote learning anytime anywhere.

3. Create a stable and sustainable financial environment built on transparency and accountability that supports people, places, and practices.

Strategic Objectives:

- a. Engage innovative, expansive, and diversified campaigns to provide financial security.
- b. Align department direction, project approval, and budgets to mission, values, principals, goals, and strategic objectives.
- c. Move to best practices with regard to business systems, processes, and procedures.

Board Goals & Strategic Objectives

4. Create an expansive environment of collaborative alliances & partnerships built around the mission of using education as a force to unite people, nations, and cultures for peace and a sustainable future.

Strategic Objectives:

- a. Invest in partnerships with aligned external organizations locally and internationally (the UN, IRC, Doctors, Without Borders, Teach for All, Creative Santa Fe, etc.) to leverage UWC mission.
- b. Develop off-campus programming (summer internships, gap years) to place our students with these organizations.
- c. Explore opportunities for creating a space on campus to house organizations and their staff.

5. Create a foundational presence within the UWC movement as being an innovator and change agent built upon programs that promote excellence among people, places, and practices.

Strategic Objectives:

- a. Build a model framework for the adoption and financing of best practices regarding flexible and collaborative learning environments, to capitalize on opportunities available because of the uniqueness of a particular site and/or being a member of the international community.
- b. Build a model framework for standardizing selections, admissions, tuition rates, fundraising practices, and financial aid regardless of location.
- c. Build a model framework results-driven practices, the data points of which could inform instruction, business systems and processes, improved student outcomes.

Board Goals & Strategic Objectives

Systems	Category	System Request/s	Have	Need	Plans
	Student	Google G-Suite, Apps for Education (GAPE) Student Information System (SIS) Student Behavioral Management System (BMS) Database & Visualization Tools ePortfolio	Y	Y Y Y Y	Leave as base Purchase Purchase Purchase Purchase
	Classroom	Learning / Classroom Management System Greater Pipe, Content Filters, Interactive Boards	Y	Y	Replace Edsby Purchase
	HR	<u>Robust HR Platform</u> Standardized Job Descriptions, Metrics Tied to Performance Onboarding Online Evaluation Platform, Surveys, NPS Professional Development & Training Platform	?	Y Y Y Y	Integrated HR & Finance Platform (purchase) Purchase Purchase Purchase
	Finance/Business	<u>Robust Financial Platform</u> QuickBooks, Excel Budget, Payroll, Procurement, Travel Online Project Evaluation & Approval System	Y Y	Y Y	Integrated HR & Finance Replace Purchase
	Facilities	<u>Robust Facilities Platform</u> Ticketing, Maintenance, Scheduling (rooms, vehicles, etc.) Emergency / Visitor Management System Security Cameras / Video / Storage	Y Y	Y Y	School Dude Purchase Purchase
	Alumni	Customer Relationship Mgmt. System (CRM)		Y	Purchase
	Advancement	<u>Multi-Channel Platform</u> New Website Google Analytics	Y	Y Y	Purchase Launch Engage

Board Goals & Strategic Objectives

Place	Categories	Stabilization	5-yr Annual	10-yr Annual	Innovating for Impact (Limited Scale)	5-yr Annual	10-yr Annual	Innovating for Impact (Aspirational)	5-yr Annual	10-yr Annual
	Endowment	20 million			20 million			20 million		
	Deferred Maintenance	55 million								
	New Construction				50 million			70 million		
	Project Mgmt (25%)				17.5 million			23 million		
	Totals	75 million	15 million	7.5 million	88 million	18 million	9 million	113 million	23 million	16.5 million
	Delta	0			13 million			38 million		

Short-Term Roadmap: Strengthening the Foundation

Short Term Framework: Strengthening the Foundation – 3 to 6 months

People	Board Goal Strategic Objective	Places	Board Goal Strategic Objective	Programming	Board Goal Strategic Objective	Practices	Board Goal Strategic Objective
Core Competency & Professional Development Opportunities & Programs	2a	Integrate All Ticketing Systems	3c	Start Conversation Around Developing Metrics to Determine Program Impact	2b, 3c	Develop User Groups & Create Single Calendar Document Management Naming Conventions	3c
Scope & Chart Decision-Tree for Emergency Management Responsibilities	1, 2a	Determine Asset Value Buildings & Grounds	3b	Start Conversation Around Reorganizing Programs	2b	Create Quarterly Reports That Roll Up Into UWC Annual Survey	3c
Clarify Personnel Roles & Responsibilities	1, 2a	Eradicate Bat Problem	1,3c	Examine Staffing to Ensure Success	1b, 2a, 3c	Compete Risk Management Plan and Implement Systems	1b-c
Hire Qualified Staff	2a	Install New Water Pumps	1, 3c	Align IB/ExEd/Res Living Times to Mission & Accreditation	2b	Develop Gap Analysis of Need	3b
Restructure Leadership Team	2a	Make a Determination on Future State of Hot Springs Ownership &/or Management	1c	Determine Appropriate Time Needed for IB/ExEd/Res Living	2b	Complete Informational Audit	3b
Produce New Job Descriptions & Install New Retirement Program	2a	Gain Legal Understanding of Strategic Options Concerning Hot Springs	1c	Roll out New Davis Scholar Model	1a-b	Create Decision Tree (with appropriate contacts & phone numbers) for Use by RTs to Ensure Ready Response to Emergency	1,3c
Complete Compensation Study	2a	Initiate Hot Springs Discussion	1c	Quantify IB/ExEd/Res Living Program Offerings	2b	Create Process to Ensure Phones are being Answered	3c

Intermediate Term Roadmap: Further strengthening the foundation

Intermediate Term Framework: Stabilization & Sustainability – 6 months to 1 year

People	Board Goal Strategic Objective	Places	Board Goal Strategic Objective	Programming	Board Goal Strategic Objective	Practices	Board Goal Strategic Objective
Reconsider Organizational Alignment	3b, 5a-c	Finalize Master Plan	1c	Use Master & Strategic Plan to Inform and Influence UWC & IB Relationship	1c, 5a-c	Align Master Plan with Strategic Plan	1c
Further Realign Compensation to Professional Development	2a	Use findings to Inform the Master Plan	3b-c	Identify issues with Branding – Develop Consistency of Look & Message	1b	Align Fundraising Activities to Projects & Timelines	3a
Explore & Engage Professional Development Platform	2a	Review Options Based upon Return on Investment	3b-c	Incorporate Design Thinking into any Building Project, Curriculum, Program and Partnerships	2c	Conduct Research on and Identify aligned Fundraising Targets	3a
Engage Net Promoter and Stakeholder Scores Tied to HR Reviews	1b, 2a	Develop Cost Comparisons of New Build v Remodel to Assess Return on Investment	3b-c	Initiate Conversation w/UWC over business model	5a-c	Identify Software Platforms Capable of Integrating & Reporting Out Relevant Data	3c
Engage Employee, Staff, & Student Pulse Surveys Tied to HR Assessments	1b, 2a	Institute Quarterly Conditional Status Reporting	3b-c	Identify Drivers of Business Model: Admissions, Income, Fundraising	3a	Develop Consistent Workflow & Practices Aligned to Best Practice (Travel, procurement, etc.)	3c
Develop Personalized Development Plans	1b, 2a	Present Preliminary Budget For Upgrades	3b-c	Build Functional Working Groups Around Learning & Living, Communications & Systems, & Institutional Advancement	1b, 2b	Align Project Approvals to Mission, Goals, Principles, & Objectives	3b
Develop 360 Reviews Tied to HR Assessment	1b, 2a	Place Value on All Assets: Buildings & Grounds	3b	Integrate & Map Academics / ExEd / Residential Living Into Single Program	2b	Institute Online Project Proposal Approval System + Project Tracking	3b-c

Long-term Roadmap: Innovating for Impact

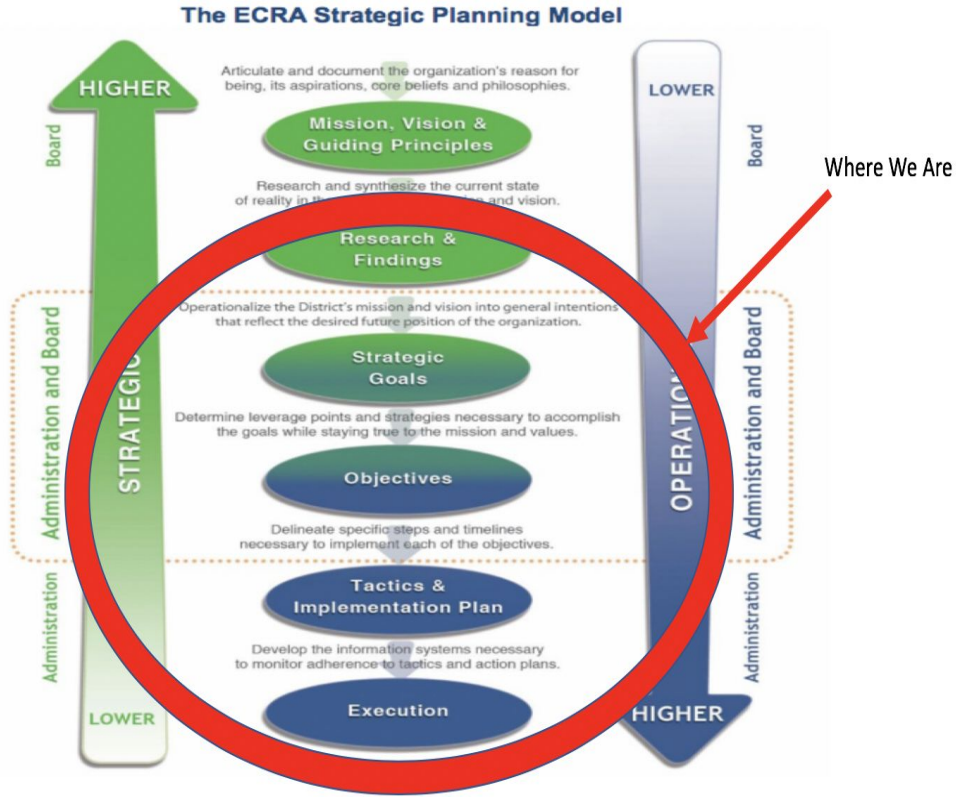
Long Term Framework: Aspirational – 2 to 3 years

People	Board Goal Strategic Objective	Places	Board Goal Strategic Objective	Programming	Board Goal Strategic Objective	Practices	Board Goal Strategic Objective
Build a model of Education Built upon Personal Development Plans that are Informed by Individual Growth Models	2a-c, 5c	Become a Model Campus for the UWC Movement	5a	Develop an Outward Presence as a "Change Maker" Institution through Strategic Partnerships and Resource Development	4a,c, 5a-c	Build a Model Framework Built around Data-informed and Results-driven Practices,	5c
Promote a Rigorous Learning Culture Based on Safety, Diversity, Inclusion, & Personal Growth	1a-c, 2-ac	Transform the Campus to Support Intercultural Understanding, Peace, and Sustainability	5a-c	Revitalize the Academic, Experiential, and Residential Experience to Focus Students on Place-based Agency	1a-b, 4a-c	Build a model framework for standardizing and reviewing Policies, Procedures, & Practices regardless of location.	5b
Hire & Support the Most Mission Driven & Qualified Personnel	2a	Execute the Campus Master Plan with a Clear Focus on Sustainability	1c	Expand Opportunities for External Alliances & Partnerships	4c	Initiate Aligned Fundraising Campaign	3a

Visual Overview of Work to be Done: 3 - 5 Year Aligned Roadmap

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Next Steps: Operationalizing the Plan



Source: ECRA Group, Inc.

- 1. Strategic Leadership Team (SLT) will Develop a Strategic Plan**
 - a. Board Goals, Strategic Objectives, & Roadmap will guide development
 - b. Strategic Plan will detail implementation of the master plan
- 2. CSO will work with respective Departments to Operationalize the Plan**
 - a. Each department will create their own set of goals & strategic objectives
 - b. Then roadmap implementation across 3 - 5 years, with specified timelines
- 3. CSO & CFO will work with Departments to Align Funding & Budgets with Goals & Objectives**
 - a. Ensures projects are appropriate
 - b. Provides transparency on funding source
 - c. Keeps projects within guardrails