

June Board Meeting



UWC-USA Strategy Discussion: Strengthening the Foundation While Preparing for 50!

Strategic Goals, Initiatives and Coherent Actions

8 June 2019

Five goals to capture UWC-USA's Strategic Direction

	Diagnosis	Guiding Policy	Goals
People, Programs, Systems	Insufficient Integration & Capacity for Running School	Mission Alignment Best Practices	<p>I. <u>Mission-driven people:</u> Attract, develop and retain mission-driven people.</p> <p>II. <u>Mission-aligned, signature, place-based programming:</u> Strengthen and develop programming that focuses students on their power as change-agents for peace and sustainability, starting with the UWC community.</p> <p>III. <u>Integrated systems:</u> Implement integrated systems and structures to support the mission and enhance the experience of all stakeholders.</p>
Facilities & Grounds	Crushing Deferred Maintenance Spaces Not Suited to Purpose	Safe, Sustainable & Transformed Environment	<p>IV. <u>Safe, sustainable and inspiring campus:</u> Improve the sustainability and safety of our campus, supporting a global values-based community.</p>
Advancement & Funding	Insufficient Funding	> Money < Costs	<p>V. <u>Advancement and Funding:</u> Develop a sustainable financial model for UWC-USA to address the projected structural deficit beginning in FYE 2023.</p>

Mission-driven people: Attract, develop and retain mission-driven people.

Initiatives	Coherent Actions
<p>A. Community Narrative. Create a concise and coherent document with our overarching cultural narrative (Ethos) and principles for action.</p>	<ol style="list-style-type: none"> 1. Initiate values discussion within the school community 2. Set-up cross functional working group to synthesize discussions 3. Develop values vision statement, cultural narrative and code of conduct that reflect discussion 4. Engage Equity and Inclusion self-study recommendations in developing cultural narrative
<p>B. Life Cycle Plan. Develop plan that addresses recruitment, on-boarding, professional development, orientation, development, offboarding.</p>	<ol style="list-style-type: none"> 1. Develop recruitment strategy and professional development program that focuses on the ethos and principles for action at the foundation of our classroom and communal life 2. Structure onboarding, orientation, and professional development opportunities that inspire and set the tone for a culture of constructive engagement 3. Formalize offboarding process to collect key retrospectives and maintain strong ties with former staff
<p>C. Support Structures. Build the structures needed to enable a successful implementation of the employee life-cycle plan.</p>	<ol style="list-style-type: none"> 1. Fill key positions to take strategic plan forward 2. Develop coaching and evaluation platform and approach to drive mission and culture 3. Develop cross-functional operating procedures to strengthen our work on behalf of students across functions 4. Rationalize compensation and benefits for market competition, intra-campus equity and excellence 5. Develop and support distributed, service leadership model at every level of the school 6. Create a model for collaborative problem solving groups to build on strengths and strengthen areas for improvement
<p>D. MZ Location Fatigue. Create opportunities to get the faculty and staff away from campus to re-energize.</p>	<ol style="list-style-type: none"> 1. Assess cost of various retreat options (e.g. condo in Santa Fe, trip) 2. Develop model for eligibility, sign-up, etc. 3. Sabbatical model



Mission-aligned programming: Strengthen and develop programming that focuses students on their power as change-agents for peace and sustainability starting with the UWC community

Initiatives	Coherent Actions
<p>A. Define mission-alignment. Conduct an all community study of what it means to be mission-aligned in each pillar (academic, residential, experiential).</p>	<ol style="list-style-type: none"> 1. Conduct audit of academic programs and make recommendation for mission-aligned guidelines based on the UWC-USA ethos 2. Develop processes and evaluate policies in Residential Life to better reflect the ethos of UWC-USA 3. Complete audit of Ex Ed programs under signature tracks and present vision for each track to advance mission from a place-based, globally informed, peace and sustainability perspective 4. Create public narrative for stakeholders, including NCs 5. Include social and emotional learning blueprint in all pillars of programming 6. Evaluate org, staffing, resource allocation and make recommendations
<p>B. Annual Plan. Develop annual program for intentional culture building in our learning and living environment throughout the year.</p>	<ol style="list-style-type: none"> 1. Restructure and resource Res Life so that there are regular points of contact with mission consideration in policy review, dorm time, etc. 2. Create guidelines for classroom experience predicated on the UWC-USA ethos 3. Focus on strategic partnerships to extend our reach and impact our own community and beyond 4. Reconceive Bartos as outward-facing, visibility-building, partnership, and advancement-focused 5. Develop and implement strategic partnership plan with focus on impact in NM (Southwest?) and on UWC-USA reputation/visibility 6. Build in time for mission inspired discussion in key culture-building venues, including forum, faculty meetings, staff meetings, dorm time, SLT meetings, etc.
<p>C. CEC as foundational and distinguishing. Identify and implement models to establish Constructive Engagement of Conflict as the distinguishing feature of UWC-USA</p>	<ol style="list-style-type: none"> 1. Each Ex-Ed track will articulate a plan to show how it gets students to reflect on the skills and tools they develop in relation to Constructive Engagement of Conflict



Integrated Systems: Implement integrated systems and structures to support the mission and enhance the experience of all stakeholders.

Initiatives	Coherent Actions
A. Decision-making. Develop systems for a collaborative, distributed and transparent decision-making process.	<ol style="list-style-type: none">1. Move to RLC model in residential life and delineate responsibilities across residential life team2. Develop department head model for academics and delineate responsibilities across team3. Develop distributed leadership model for Experiential Education4. Create lean SLT model, with regular director level/department head interface around key annual and strategic decisions5. Develop, implement, and communicate a clear decision-making rubric to support the distributed leadership model
B. Student experience systems. Develop systems to support and enhance student experiences in all areas of programming.	<ol style="list-style-type: none">1. Develop key calendars for balanced student experience2. Strengthen PLT model for maximum student support3. Develop opportunities for meaningful employee engagement of the mission
C. Satisfactory work environment. Adopt a design thinking approach to develop and implement key systems for operations.	<ol style="list-style-type: none">1. ID, assess, propose, select SIS, SBS with modular capabilities across HR, advancement, records management, etc.2. Design, develop, install records management system, protocols3. Create a standing committee structure to prioritize key drivers of an excellent UWC-USA workplace (e.g., diversity and inclusion, compensation, professional development, ??.)4. Develop and implement a complete risk management and safety plan across all functions5. Develop a transportation model, including targeted focus on driver training, that maximizes safety while providing meaningful student experience opportunities
D. Internal and external interface. Develop technological tools and protocols to build strong points of contact among all members of UWC-USA community.	<ol style="list-style-type: none">1. Review, improve, integrate public interface: website, phone tree, external and internal communications, directory, email list2. Develop and implement robust internal and external communication plans, focusing on consistent, mission-aligned messaging, repeatability for continuity of experience across constituencies, and visibility and reputation building opportunities3. Put into place SOPs to support core functions and clarify cross-functional interfaces

Safe & Sustainable Campus: Improve the sustainability and safety of our campus, creating an environment to support a global values-based community.

Initiatives	Coherent Actions
<p>A. Sustainability and resilience. Prioritize sustainability and resilience in all key decisions made by the school.</p>	<ol style="list-style-type: none"> 1. With staff and students, develop an iterative approach to sustainable policies/practices on campus focused on energy, water, food production and consumption, and human energy and work as a resource 2. Partner with students and employees on behavior element in sustainable living 3. Evaluate sustainable approach to housing needs 4. Integrate sustainability elements in curricular and co-curricular execution 5. Transition landscaping with water conservation focus
<p>B. Focused capital expenditures. Prioritize deferred maintenance and capital projects focused on historic buildings, classroom experience, sustainability and accessibility</p>	<ol style="list-style-type: none"> 1. Focus efforts on historic buildings, big ROI for student classroom experience, campus appearance, ability to leverage campus for revenue generation 2. Improve high impact hardscapes, landscapes incrementally in keeping with landscape master plan 3. Close out master plan/landscape plan and phase implementation in consideration of location study
<p>C. Zone Management Approach. Develop a zone management approach to facilities and grounds that makes all members of the UWC-USA community responsible for a sustainable campus</p>	<ol style="list-style-type: none"> 1. Create cross-community stewardship teams for zone management approach as part of place-based, residential learning (students, faculty, staff) and make time in the schedule for execution 2. Develop and implement a high impact operations approach, to include exploration of Sodexo partnership (full or hybrid) 3. Expand the farm impact (e.g., outdoor classroom; landscaping on main campus tie in?)
<p>D. Communal access. Provide communal access while creating a safe and healthy campus environment for our students</p>	<ol style="list-style-type: none"> 1. With community partners, determine direction for hot springs and implement 2. Develop a comprehensive approach to minimizing fire danger through forest management 3. Create signage, interactive stopping points to orient and inspire interest in UWC-USA 4. Create spaces that welcome the public and serve campus-community interactions 5. Work with the county to address access to campus for security purposes

Advancement & Funding: Develop a sustainable financial model for UWC-USA to address the projected structural deficit beginning in FYE 2023.

Initiatives	Coherent Actions
<p>A. Resource and allocation model. Develop a resource income and allocation model that is consistent with our mission, values, and local circumstances.</p>	<ol style="list-style-type: none"> 1. Audit big ticket items and search for savings 2. Undertake a market study to create a baseline for compensation across job families 3. Develop a rationalized compensation structure and approach to increases that values excellence in all members who make our community possible 4. Continue zero based budgeting with focus on program building in three pillars of student experience 5. Determine staffing based on capacity building for excellence 6. Reevaluate Sodexo food service contract for greater sustainability and savings
<p>B. Fundraising strategy. Develop and execute a fundraising strategy to leverage our growing (and aging!) alumni base, friends, 40th and 50th anniversaries.</p>	<ol style="list-style-type: none"> 1. Develop staffing plan, remote approach for advancement to reflect global donor base 2. Develop campaign case statement and structure based on finalized strategic plan 3. Create a targeted marketing plan 4. Develop alumni engagement plan to dovetail with campaign prep and in response to Steele sponsored alumni survey 5. Develop and execute a 40th Anniversary endowment campaign
<p>C. Tuition strategy. Develop a mission-aligned tuition strategy to make tuition a significant revenue stream while enhancing economic diversity</p>	<ol style="list-style-type: none"> 1. Develop enrollment management model to maximize tuition dollars in context of economic diversity strategy 2. Reconfigure U.S. Davis Scholars funding model on a hybrid merit/needs-based approach
<p>D. Alternative revenue stream. Develop an alternative revenue stream strategy that intentionally extends mission, reputation, or visibility.</p>	<ol style="list-style-type: none"> 1. Develop a cross-constituency task force to study potential revenue generation opportunities from a mission/values/revenue standpoint and make recommendations for innovation 2. Evaluate current summer programs through mission plus revenue lens and create a 3 year plan for capacity building or phasing out
<p>E. Location as asset or liability. Conduct a cost benefit analysis of staying in Montezuma campus vs another mission-aligned location</p>	<ol style="list-style-type: none"> 1. Identify 2-3 alternative mission aligned locations 2. Assess cost and benefit of locations Vs. Montezuma campus (incl. finances, staffing, brand, mission)