



Strategic Plan

June 08, 2019
Montezuma, New Mexico

UWC makes education a force to unite people, nations and cultures for peace and a sustainable future



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Executive Summary

This strategic plan represents the insights and hard work of many stakeholders at UWC-USA. It has included a thorough audit and wide consultation with stakeholders, diagnosis of our strengths and weaknesses, development of a guiding policy, consideration of various coherent actions for different possible strategies, and serious reflection on what it means to be a values-based community. All strategies considered, including the two adopted in this plan, proceed from a vision of a UWC-USA that is mission-aligned in all we do, sustainable well into the future, and focused on signature, place-based programming that distinguishes the UWC-USA experience within the UWC movement and within the larger educational market.

The plan puts forward two strategies. Our first strategy, to be our primary focus in the next 3-5 years, is to strengthen our foundation. Our second strategy is to innovate for impact. This latter strategy is meant to orient us toward the 50th Anniversary of UWC-USA in 2032.

The choice to pursue two strategies emerged in response to where we are at this moment in our history and where we want to be by our 50th Anniversary. Our audit, coupled with our conversations with stakeholders, made two things clear: First, we are at a moment in our history when we have much work to do to strengthen our foundation. Basic systems, processes, and protocols need to be developed in keeping with our mission and policies. Second, we cannot miss the opportunity that our upcoming 50th Anniversary provides to consider what it means for UWC-USA to innovate for impact as we approach the middle of the 21st century. These strategies will be pursued mostly consecutively, but also concurrently where appropriate.

The strategic plan begins with this executive summary, meant to offer the vision guiding our work and the five goals that we believe will take us forward on both the strategy to strengthen our foundation and the strategy to innovate for impact. Next is an outline of goals and initiatives under the strategy to strengthen the foundation. A brief execution plan outline is also included. Appendices, to be added in the coming months, will include some context for the plan, including previous strategic planning initiatives at UWC-USA, a recap of the process and insights leading to the current plan, consideration of the UWC international strategic plan, and the context of a changing world that confronts us going forward and that we will consider as we undertake planning for the strategy to innovate for impact.

We will pursue five goals under each of our two strategies. They are as follows:

- 1. Mission-driven people:** Attract, develop and retain mission-driven people who recognize their power to be positive change agents in the world, starting with the values-based learning and living community that is UWC-USA.
- 2. Mission-aligned, signature, place-based programming:** Strengthen and develop programming that focuses the students on their power as change agents for peace and sustainability in their own lives, in their face-to-face and virtual communities, and in the

unique places they find themselves in the world, starting with their two-year experience at UWC-USA.

3. Integrated systems: Identify, select, and implement integrated systems to support decision-making and the student experience, ensure a satisfying work environment, and maintain an excellent interface with internal and external members of the UWC-USA community.

4. Safe and inspiring campus: Develop a campus that is safe and conducive to leveraging the tremendous diversity our students bring to create a global, values-based community focused on developing student agency for good in their communities.

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

Outline of the Strategic Plan Goals and Initiatives

- I. **Mission-driven people:** Attract, develop and retain mission-driven people.
 - A. **Community Narrative.** Create a concise and coherent document with our overarching cultural narrative (Ethos) and principles for action.
 - B. **Life Cycle Plan.** Develop plan that addresses recruitment, on-boarding, orientation, professional development, offboarding.
 - C. **Support Structures.** Build the structures needed to enable a successful implementation of the employee life-cycle plan.
 - D. **MZ Location Fatigue.** Create opportunities to get the faculty and staff away from campus to re-energize.

- II. **Mission-aligned, signature, place-based programming:** Strengthen and develop programming that focuses students on their power as change-agents for peace and sustainability, starting with the UWC community.
 - A. **Define mission-alignment.** Conduct an all community study of what it means to be mission-aligned in each pillar (academic, residential, experiential).
 - B. **Annual Plan.** Develop annual program for intentional culture building in our learning and living environment throughout the year.
 - C. **CEC as foundational and distinguishing.** Identify and implement models to establish Constructive Engagement of Conflict as the distinguishing feature of UWC-USA.

- III. **Integrated systems:** Implement integrated systems and structures to support the mission and enhance the experience of all stakeholders.
 - A. **Decision-making.** Develop systems for a collaborative, distributed and transparent decision-making process.
 - B. **Student experience systems.** Identify and develop systems to support and enhance student experiences in all areas of programming.
 - C. **Satisfactory work environment.** Adopt a design thinking approach to develop and implement key systems and protocols for operations.
 - D. **Internal and external interface.** Develop technological tools and protocols to build strong points of contact among all members of UWC-USA community.

- IV. **Safe, and sustainable campus:** Improve the sustainability and safety of our campus to support a global values-based community.
- A. **Sustainability and resilience.** Prioritize sustainability and resilience in all key decisions made by the school (e.g. purchasing policy, programming, etc.).
 - B. **Focused capital expenditures.** Prioritize deferred maintenance and capital projects focused on historic buildings, classroom experience, sustainability and accessibility.
 - 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 safe and sustainable campus.
 - D. **Communal access.** Provide communal access while creating a safe and healthy campus environment for our students.
- V. **Advancement and Funding:** Develop a sustainable financial model for UWC-USA to address the projected structural deficit beginning in FYE 2023.
- A. **Resource and allocation model.** Develop a resource and allocation model that is consistent with our mission, values, and local circumstances.
 - B. **Fundraising strategy.** Develop and execute a fundraising strategy to leverage our growing (and aging!) alumni base, friends, 40th and 50th anniversaries.
 - C. **Tuition Strategy.** Develop a mission-aligned tuition strategy to make tuition a significant revenue stream while enhancing economic diversity.
 - D. **Alternative revenue stream.** Develop an alternative revenue stream strategy that intentionally furthers mission, reputation, and / or visibility.
 - E. **Location as asset or liability.** Conduct a cost benefit analysis of staying in Montezuma campus vs another mission-aligned location.

Strategic Plan with Initiatives & Coherent Actions - [Strategic Plan Board Presentation](#)

Execution Plan

The Strategic Plan above clarifies the direction and focus for UWC-USA over the next three years, as it focuses on strengthening the foundation. In order to ensure a successful implementation of this plan, some key elements must be in place:

- **Priority Initiatives:** Identify 4-5 initiatives to focus over the next year to target the efforts of the school community and earn some quick wins
- **Timeline:** A high level timeline of how these priority initiatives will be sequenced between June 2019 and June 2020
- **Structure and Logistics of Cross Functional Teams:** Clear roles and responsibilities of the various stakeholders that will take this plan forward and how they will effectively collaborate with each other
- **Additional resources needed:** staffing, technology and special allocations
- **Templates:** reporting templates, list of deliverables

Execution Plan - [Strategic Execution Plan](#)