# Innovate for Impact Strategy

## Making Choices within our Framework

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     **N.B. These ideas establish an "Innovation" horizon within which we are identifying "Foundation" funding opportunities for a 40th anniversary campaign**

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# I. Executive Summary: How did we get here?

> **By distinguishing between good / bad strategy:**

| Signs of a bad strategy | Tests of a good strategy |
|---|---|
| Lack of a clear **diagnosis** (or wrong diagnosis)<br><br>Mistaking long list of **goals** for a strategy<br><br>Failure to make **choices**<br><br>**Fluff -** abstractions masking the absence of thought | A **good diagnosis -** simplifying the overwhelming complexity of reality by identifying certain critical levers<br><br>A **guiding policy -** an overall approach to overcome the obstacles identified in the diagnosis<br><br>**Coherent actions -** steps that are coordinated with one another to support the accomplishment of the guiding policy |

# I. Executive Summary: How did we get here?

**2018**

➢ Victoria and the Board complete an initial *diagnosis* of the school's key challenges and establish a *guiding policy* for the development of the strategic plan:

| Original Diagnosis Developed in 2018 | Guiding Policy |
|---|---|
| **People, programs, and systems** – insufficient capacity and integration for delivering on our mission. | 1) Focus on mission-values alignment; 2) Adopt known best practices; 3) Develop project plans for ops./prog. improv. |
| **Facilities and grounds** – substantial deferred maintenance costs, and spaces not suited-to-purpose for the school's use. | 1) Improve safety of facilities/grounds; 2) Enhance environ. sustain; 3) Upgrade facil./grounds for purpose. |
| **Funding model** – financially unsustainable and has not generated the resources the school needs. | 1) Increases revenues within a sustainable financial model; 2) Decreases costs within a sustain. fin. model. |
| Additional Diagnosis Developed in 2020 | Framing |
| **Internally** – impact is limited by our lack of differentiation, relatively small number of students served, the low profile or weakness of our educational brand, and financial resources.<br><br>**Externally** – global context presents the challenges of inequality, political polarization, and climate change/ ecological crisis. | Increase our impact by choosing innovations that: 1) improve the **quality** of our engagement with each student/stakeholder; 2) increase the **quantity** of students/stakeholders we engage annually. |

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# I. Executive Summary: How did we get here?

**2018-19**

➢ The Board adopts a two-phase *strategy:*

    Phase I: Strengthen the Foundation (3-5 year view) – <u>Staff-led</u>

    Phase II: Innovate for Impact (10+ year view) – <u>Trustee-led</u>

➢ The Board establishes 5 *strategic goals* for Phases I and II: 1) Mission-driven people;
    2) Mission-aligned, signature, placed-based programming; 3) Integrated systems
    4) Safe and inspiring campus; 5) Funding and advancement

**2019-20**

➢ The SLT leads the planning and implementation of 20 "Strengthen the Foundation" initiatives.

**2020-21**

➢ The Board leads the development of an "Innovate for Impact" framework.

➢ The SLT continues to lead on the 20 "Strengthen the Foundation" initiatives.

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# II. Innovate for Impact framework

**What is our aspiration?**

To establish UWC-USA as the leader among international secondary schools through our commitment to equity and excellence in the service of peace and sustainability.

**What will we do?**

Prepare students as resilient leaders committed to solving the global challenges of the 21st century:

- **The economic, political, and social inequality** – between those at the center and those on the margins of societies worldwide;
- **Political polarization** – rooted in ideology, grievance, and uneven democratic practice/institutions;
- **Climate change, ecosystem destruction, and biodiversity collapse** – resulting from destructive modes of production, consumption, and land use.

**How will we do it?**

By reimagining the college as a global *basecamp* organized to equip students with a range of experiences, perspectives, and skills needed to take on the challenges of the 21st century (the "mountains").

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# II. Innovate for Impact framework

**The 5 leading ideas/initiatives in our framework:**

1. *Program*: Organize our programming around learning expeditions through which students can explore the global challenges before us.

2. *People*: Attract, develop, and organize employees, alumni, and other partners as basecamp and "mountain" leaders.

3. *People*: Establish new pathways to our basecamp for students, and other constituents, whose identities and experiences situate them on all sides of the global challenges of the 21$^{st}$ century.

4. *Place*: Leverage our campus as a true basecamp for mission in Northern New Mexico.

5. *Funding*: Develop a sustainable financial model to support our global basecamp.

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# III. Key choices within our framework

| | Choices | Implications |
|---|---|---|
| **Program** | -Focus on global challenges of 21$^{st}$ century<br>-Prioritize core competencies in curricula design<br>-Bartos becomes inward/outward facing ctr. for mission excel.<br>-Expand programming virtually through **Partnerships** | For students:<br>For time in schedule:<br>For money: |
| **People (employees, alumni, partners)** | -Develop "basecamp" leaders/teams to support program<br>-Include alumni as "basecamp" team members<br>-More intentionally design/support fellows<br>-Engage university **Partnerships** to diversify program staff | For students:<br>For time in schedule:<br>For money: |
| **People (students, others)** | -Increase/secure diversity, equity, access and promise among students by fully funding cost of education<br>-Serve more students annually outside of two-year program<br>-Bring more **Partners** in mission to campus for sharing/ enhancing program by leveraging new/existing relationships | For students:<br>For time in schedule:<br>For money: |
| **Place** | -Implement Master Plan (in phases) with focus on mission and sustainability<br>-Establish campus as model for sustain – net zero by 2032<br>-Share commit. to educ. excel., sustainability, and peace-building through regional **Partnerships** | For students:<br>For time in schedule:<br>For money: |
| **Funding** | -Go big, 40 for 40 campaign ($40M for 40$^{th}$ anniversary) to focus on Foundation needs within Innovation horizon, on way to $100M | For students:<br>For time in schedule:<br>For money: |

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# IV. Concrete ideas for each of our 5 initiatives

**1. *Program*: Organize our programming around learning expeditions through which students can explore the global challenges before us.**

By 2032, UWC-USA will:

A. Implement a model for designing and leading learning expeditions within and across our IB Academic, Experiential Education, and Residential Life curricula.

B. Integrate our 2-year program with the themes of inequality, polarization, and the climate/ecological crisis:
      i. Establish cross-curricular teams focused on these three global challenges;
      ii. Prepare students to fulfill program requirements in alignment with their particular interests under the global challenges of the 21st century.

C. Challenge students to build the following core competencies and share these skills in service to others:
      i. Authentic problem-solving through collaboration and innovation;
      ii. Leadership capacity gained through personal challenge and social-emotional learning;
      iii. Dialogue across differences, constructive engagement of conflict, and sustainable practice;
      iv. Advanced academic skills and essential knowledge within and across subject groups.

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# IV. Concrete ideas for each of our 5 initiatives

**1. *Program*: Organize our programming around learning expeditions through which students can explore the global challenges before us. (cont.)**

By 2032, UWC-USA will:

D. Reorganize the Bartos Institute to drive internal and external programming that promotes the constructive engagement of conflict and sustainability in the current global context. (1)

> The Bartos team:
> i. Serves as a resource for the IB Academic, Experiential, and Residential Life curricula in their ongoing engagement with inequality, polarization, and the climate/ecological crisis;
> ii. Repackages campus learning expeditions for delivery in new on-campus summer programming and in new year-round virtual programming;
> iii. Organizes internal-facing and external-facing events and conferences focused on advancing peace and sustainability.

# IV. Concrete ideas for each of our 5 initiatives

**2. *People*: Attract, develop, and organize employees, alumni, and other partners as basecamp and "mountain" leaders.**

By 2032, UWC-USA will:

A. Organize our faculty primarily as flexible, cross-curricular teams oriented to designing and leading learning expeditions focused on the global challenges of the 21st century.

B. Reimagine the current Fellows program to intentionally recruit: (2)

> i. Fellows who can accelerate the development of chosen program innovations and the teams needed to support them;
> ii. Fellows who, as researchers, practitioners, or coaches in fields related to our integrated curricula, can enhance student experience on a weekly basis.

C. Attract and develop both young and veteran talent within a faculty/staffing model that reduces disruptive turnover.

D. Establish UWC-USA as the go-to interning and mentoring opportunity among university and other partners dedicated to equity and excellence in education in order to build and sustain a diverse program staff, while introducing traditionally underrepresented communities to international education career opportunities.

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**3. *People:* Establish new pathways to our basecamp for students, and other constituents, whose identities and experiences situate them on all sides of the global challenges of the 21st century.**

By 2032, UWC-USA will:

A. Strengthen the diversity, access, and equity in our two-year program by annually awarding all admitted students a fully funded educational scholarship—room and board expenses are covered by families, national committees and/or our financial aid program. (3)

B. Redesign our summer programming to provide educational opportunities through a new on-campus experience and/or a new virtual learning platform, aligned with our two-year program and student recruitment.

C. Through the emerging UWC Global campus or other partnerships (e.g., Amala, RISE), contribute to virtual programming that is aligned with our two-year program and student recruitment, providing year-round educational opportunities to students who lack access to global education.

D. Establish a regular cycle of conferences/events through which we engage UWC alumni, UWC colleagues, other educational professionals, and other local and international partners in mission.

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# IV. Concrete ideas for each of our 5 initiatives

**4. *Place*: Leverage our campus as a true basecamp for mission in Northern New Mexico.**

By 2032, UWC-USA will:

A. Achieve carbon neutrality by 2032, realizing an annual 10% reduction to our net carbon emissions in the intervening years, thereby turning our campus into a model of sustainability. (4)

B. Fulfill the highest priorities in the campus Master Plan by renovating or replacing selected buildings, redesigning campus circulation, and transforming the campus landscape. (5)

C. Establish our campus as a regional center/model of peacebuilding and sustainability:
> i. Engage our students in the development of all sustainability projects for grounds, facilities, transportation, energy consumption/generation, water, etc;
> ii. Provide on-site, educational opportunities for local k-12 students throughout the school year focusing on global and ecological citizenship.

# IV. Concrete ideas for each of our 5 initiatives

**5. *Funding*: Develop a sustainable financial model to support our global basecamp.**

By 2032, UWC-USA will:

A. Generate funding for new investments in our scholarship expansion and basecamp infrastructure;

B. Reallocate resources to fulfill our programming and faculty/staffing priorities.

# IV. Concrete ideas for each of our 5 initiatives

*In all we do across these five initiatives, we will cultivate a basecamp ethos of integral sustainability, honoring the interconnectedness among individuals, communities, and the environment.*

# V. Next Steps

**Strategy Development**

1. Complete a preliminary from-to analysis, centered on student experience, to sharpen our presentation of the plan.

2. Add to our plan a more rigorous analysis that considers the following two questions:
      i. What capabilities (or assets) are needed to achieve our Innovate for Impact plan?
      ii. What management structures are needed to achieve our plan?

3. Develop a UWC-USA Strategic Plan document to share with external stakeholders.

4. Continue to link to funding opportunities in the campaign, case statement, and other supporting materials.

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# VI. Notes

(1) This idea envisions the Bartos Institute becoming a Center for Mission Integration or Center for Mission Excellence. We are currently looking into the Bartos endowment to see what flexibility we have for reorganizing the institute while preserving its core work.

(2) Our current Fellows program is open to alumni and others who can serve in one of a variety of capacities (i.e. Sustainability, Arts and Culture, Bartos Institute, Alumni-in-Residence). Fellows are offered room and board and a small stipend, and the chance to work with students and the campus community during short residencies that align with our mission and goals. In the fall 2019 we had one Sustainability Fellow on campus. In the 2020-21 school year, we had one Sustainability Fellow on campus. In the fall 2021, we will have two Bartos Fellows on campus. We basically take whom we can get when we can get them, with a very few resources or structures in place. That said, our recent Fellows have been strong.

(3) Why strive to offer a fully-funded educational scholarship to every student?

    a. To lead on equity (for all) within the UWC movement and broader U.S. boarding school movement;

    b. To position us to select for the most "promising" students;

    c. To eliminate all perceived and real financial barriers for students from families with modest resources, whose countries' national committees cannot adequately fund scholarships;

(3) Why strive to offer a fully-funded educational scholarship to every student? (cont.)

      d. To increase our donor base in the coming years—we can more aggressively and very compellingly ask for annual fund support and campaign support from parents of current students.

      e. UWC-USA has attracted a 1st generation funder (Hammer) and a 2nd generation funder (Davis). Could a radical commitment to equity/promise that sets us apart from peer institutions be the key to attracting a 3rd generation funder?

      f. We can likely afford it over time. Currently, we fund 75% of the cost of education through our endowment draw, annual fund, Davis Scholarship program, and the $1M Davis supplemental. Analysis remains to be done in order to determine possible financial pathways.

(4) Analysis remains to be done in order to determine a range of costs for implementing campus sustainability projects.

(5) Analysis remains to be done in order to determine a range of costs for implementing Master Plan priorities.

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