



**Phase II: Innovate for Impact**

**Ongoing Development of Concrete Ideas  
within Our Framework**

**February 12, 2022**

# Contents / Agenda

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## **I. Review: 10:15 – 10:25**

- A. Strategic Plan Overview (slide 3)
- B. Innovate for Impact framework (slides 4-5)
- C. Timeline for developing the concrete ideas (slide 6)
- D. Concrete ideas within the Innovate for Impact framework (slides 7-12)
- E. Any discussion?

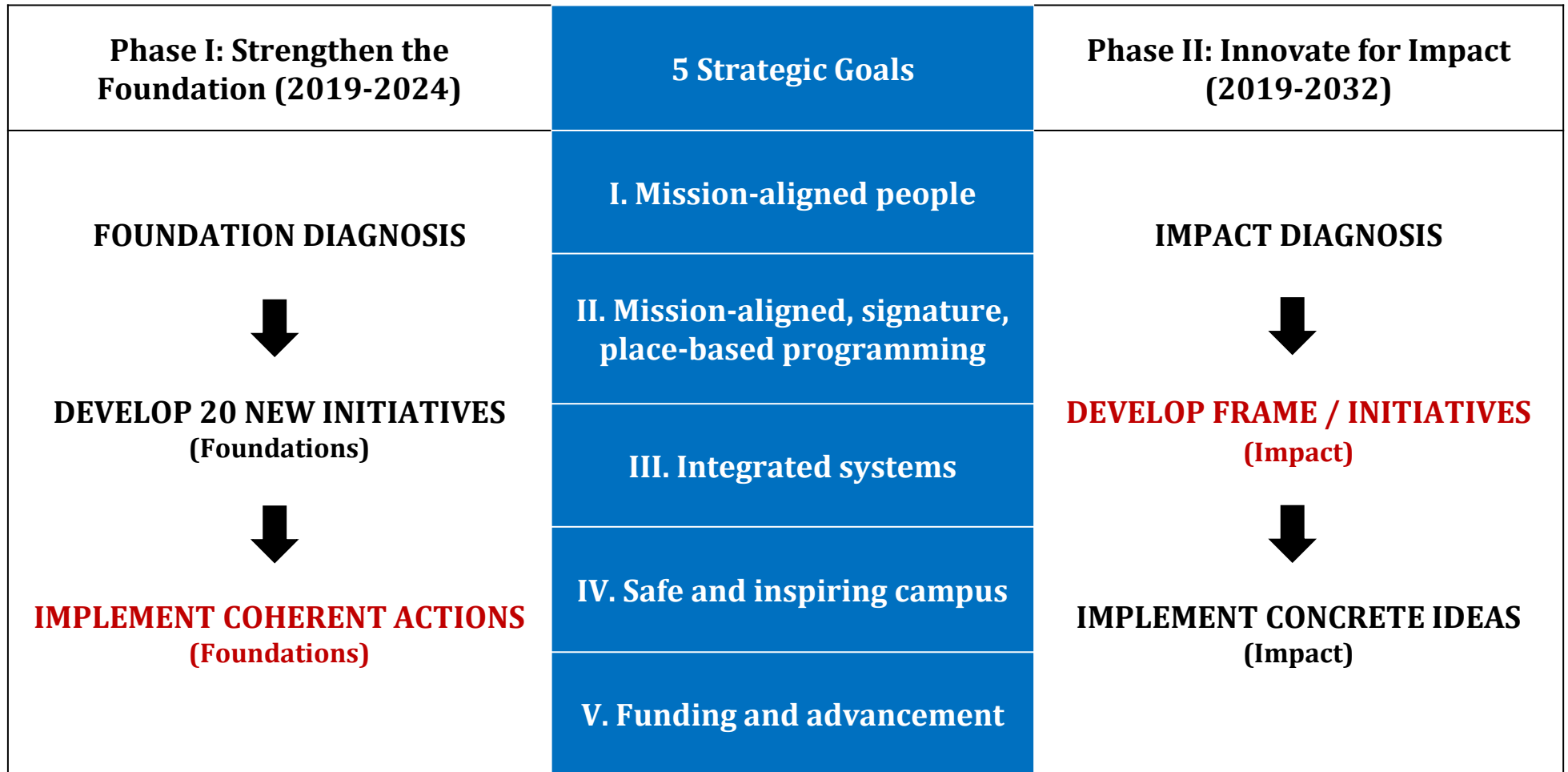
## **II. Development of Idea 1A (Scholarships): 10:25 – 10:55**

- A. Presentation (slides 14-16)
- B. Discussion

## **III. Development of Idea 4A (Master Plan): 10:55 – 11:40**

- A. Presentation (slides 18-20)
- B. Discussion

# Strategic Plan overview



# Innovate for Impact framework

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## 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 these global challenges of the 21st century, and related ones:

- **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.

# Innovate for Impact framework

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## The 5 leading initiatives in our framework:

- 1. *People (Students):*** Establish new pathways to our basecamp for students whose identities and experiences situate them on all sides of the global challenges of the 21<sup>st</sup> century.
- 2. *Program:*** Intentionally align student learning within our academic and experiential programming with the global challenges of the 21<sup>st</sup> century.
- 3. *People (Personnel):*** Attract, develop, retain, and send forth employees, interns, and fellows—especially alumni—as global basecamp leaders.
- 4. *Place:*** Redevelop our campus as an inspiring basecamp for mission in Northern New Mexico, serving our students, regional communities, and international partners.
- 5. *Funding:*** Develop a sustainable financial model for UWC-USA to secure its future as an exemplar of philanthropy-based educational access, educational programming for the 21<sup>st</sup> century, and investing in a sustainable school campus.

# Timeline for developing concrete ideas

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## **February 2022 Board Meeting:**

- Idea 1A: Scholarships
- Idea 4A: Master Plan

## **June 2022 Board Meeting:**

- Idea 2B: Core competencies
- Idea 1B: New support/prep program

## **October 2022 Board Meeting:**

- Idea 3B: Fellows program
- Idea 3C: New interning/mentoring model

## **February 2023 Board Meeting:**

- Idea 3A: New faculty/staffing model
- Idea 4B: Regional (k-12) center for peacebuilding/sustainability
- Idea 4C: Conferences/events for partners in mission

## **June 2023 Board Meeting:**

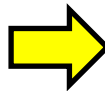
- Idea 2A: Model for learning expeditions
- Idea 2C: Cross-curricular teams
- Idea 1B: Summer and/or virtual programming

# Concrete ideas within the Innovation framework

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**1. *People (Students)*: Establish new pathways to our basecamp for students whose identities and experiences situate them on all sides of the global challenges of the 21<sup>st</sup> century.**

By 2032, UWC-USA will:



- A. Secure and expand access to our basecamp by endowing current and new full scholarship commitments:
  - i. Phase I: Endow 40 full tuition scholarships per class, including 5 new Dare to Dream scholarships;
  - ii. Phase II: Adopt a model for wider scholarship expansion that best reflects the idealism of the UWC movement and our aspiration to be a leader on equity and excellence.
- B. Develop a program designed to prepare and support admitted students for whom our IB curriculum will present the greatest challenge (e.g., English language learners, students overcoming an educational disruption, students with limited exposure to a rigorous academic curriculum).
- C. Increase the number of students we engage annually through a new initiative (e.g., summer program, virtual program) that aligns with our two-year program and student recruitment goals.

## Concrete ideas within the Innovation framework

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### **2. *Program*: Intentionally align student learning within our academic and experiential programming with the global challenges of the 21<sup>st</sup> century.**

By 2032, UWC-USA will:

- A. Integrate a model by which faculty design and lead learning expeditions that invite students to explore solutions to the global challenges before us;
- B. Challenge students to build the following core competencies and share them with others:
  - i. Social-emotional awareness (self, interpersonal, team);
  - ii. Authentic problem-solving;
  - iii. Innovative design;
  - iv. Social-entrepreneurial leadership.
- C. Build cross-curricular teams focused on the global challenges of the 21<sup>st</sup> century.

## Concrete ideas within the Innovation framework

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**3. *People (Personnel)*: Attract, develop, retain, and send forth employees, interns, and fellows—especially alumni—as global basecamp leaders.**

By 2032, UWC-USA will:

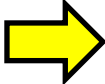
- A. Reduce disruptive turnover through a newly designed faculty/staffing model;
- B. Reimagine the current Fellows program to intentionally recruit:
  - i. Fellows who can accelerate the development of chosen program innovations and the teams needed to support them;
  - ii. Fellows who, as researchers, practitioners, or coaches in fields related to our integrated curricula, enhance student experience on a weekly basis.
- C. Through partnerships with selected universities and other organizations, build and sustain a diverse program staff while introducing traditionally underrepresented communities to international education career paths.

## Concrete ideas within the Innovation framework

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**4. *Place*: Develop our campus as a true basecamp for mission in Northern New Mexico, serving our students, regional communities, and national/international partners.**

By 2032, UWC-USA will:

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- A. Complete the transformation of our facilities and grounds into a high-performing campus by:
    - i. Repurposing existing buildings as inspiring spaces that enable us to fulfill our program, administrative, and external engagement objectives;
    - ii. Enhancing the resilience of our campus water, soil, and plant/wildlife systems;
    - iii. Achieving carbon neutrality in our campus operations and program delivery.
  - B. Establish our campus as a regional center for peacebuilding and sustainability by providing on-site educational opportunities for K-12 students throughout the school year.
  - C. Leverage our location and program to engage UWC alumni, UWC colleagues, other educational professionals, and other partners in mission through a regular cycle of conferences/events.

## Concrete ideas within the Innovation framework

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**5. *Funding*: Develop a sustainable financial model for UWC-USA to secure its future as an exemplar of philanthropy-based educational access, educational programming for the 21st century, and investing in a sustainable school campus.**

By 2032, UWC-USA will:

- A. Generate needed funding for investments in scholarship expansion, program innovation, teaching excellence, and basecamp infrastructure;
- B. Reallocate resources to fulfill our programming and faculty/staffing priorities.

# Innovation Ethos

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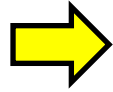
***In all we do across these five initiatives,  
we will cultivate a basecamp ethos of integral sustainability,  
honoring the interconnectedness among individuals,  
communities, and the environment.***

**Framework, initiatives, timeline, concrete ideas, ethos**

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**Any discussion?**

# Idea 1A Summary (Scholarships)



**Secure and expand access to our basecamp by endowing current and new full scholarship commitments:**

- i. Phase I: Endow 40 full tuition scholarships per class, including 5 new Dare to Dream scholarships;
  - ii. Phase II: Adopt a model for wider scholarship expansion that best reflects the idealism of the UWC movement and our aspiration to be a leader on equity and excellence.
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**1. What is the cost Phase I? – \$2M**

**2. What is the pathway for meeting this cost? – Increase our endowment to \$168M by raising money for a new scholarship fund (e.g., Basecamp Access Fund).**

**3. What are the key outcomes?**

- A. Secure 40 full tuition scholarships per class, increasing the proportionality of these students:
  - i. First-gen college-bound students, multi-gen African-American students, Native American students, underrepresented ethnic groups abroad, refugees (conflict/climate), internally displaced persons (conflict/climate), and those on socio-economic margins.
- B. Meet the new Dare to Dream match, unlocking funding for 5 additional D2D students per class.
- C. Replace the \$2M Davis grant with new endowment revenue.
- D. Begin to explore pathways for further scholarship expansion.

# Idea 1A: Cost analysis for Phase I

**Source of the \$2M cost to endow 40 full tuition scholarships per class, or a total of 80 annually:**

(based on the FYE '22 budget)	Annual # of students	Actual cost to the college (1)	Estimated portion of this cost not funded by our endowment
<b>Fully funded students</b>			
A. Students awarded a full tuition scholarship by the college	50	\$2.9M	\$890K
B. Dare to Dream Scholars who receive additional award money from the college	20 (2)	\$670K	\$530K
C. U.S. Davis Scholars who receive a \$25K scholarship and additional award money from the college	10	\$590K	\$380K
<b>Totals</b>	<b>80</b>	<b>\$4.2M</b>	<b>\$1.8M</b>

(1) Award money plus the per student tuition subsidy contribute to this cost

(2) Getting to 20 D2D students requires us to meet the new Davis match of \$25,000 per student for 10 students, or a total of **\$250,000** annually.

# Idea 1A: Endowment revenue analysis for Phases I and II

## Scenarios for expanding our full scholarship commitment beyond 40 per class:

(based on the FYE '22 budget)		Endowment's trailing 12 qt avg	Endowment draw less \$1.7M for DSA	Revenue increase over FYE '22	What could we achieve w/this additional revenue?
Present	FYE '22	\$128M	\$4.7M	n/a	n/a
	FYE '23	\$139M	\$5.2M	\$500K	Reduce structural deficit by \$500K
Phase I	Scenario I	\$156M	\$6.1M	\$1.4M	Eliminate the structural deficit
	Scenario II	\$168M	\$6.7M	\$2M	Endow 40 full tuition scholarship commitments per class
Phase II	Scenario III	\$189M	\$7.8M	\$3.1M	1) Award 10 new full tuition scholarships per class OR 2) Award all students w/ a scholarship that covers the actual cost of the educ. prog. (\$46K); not R&B
	Scenario IV	\$225M	9.6M	\$4.9M	Award all students with a scholarship that covers the actual cost of the educ. prog. + R&B (\$59K)

### Three important questions will determine what we can accomplish through our endowment:

- 1) How will our endowment perform over the next two years?
  - Value on December 31, 2021 = \$153M
  - Finance Cmte's projection for FYE '24 = \$145M
- 2) Will the Davis family make a transformational gift to the endowment?
- 3) How much money will the campaign raise for the endowment?

(Blue text = would involve transitioning to a new tuition/scholarship model)

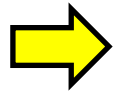
# Idea 1A Summary (Scholarships)

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## Discussion

## Idea 4A Summary (Master Plan)

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**Complete the transformation of our facilities and grounds into a high-performing\* campus by:**

- i. Adaptively reusing existing buildings as inspiring spaces that enable us to fulfill our program, administrative, and external engagement objectives;
  - ii. Enhancing the resilience of our campus water, soil, and plant/wildlife systems;
  - iii. Achieving carbon neutrality in our campus operations and program delivery.
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**1. What is the cost? –**

- A. Repurposing LC dorms for Acad; Castle for Res, Admin: \$42M - \$50M (prelim construction costs)
- B. Enhancing the resilience of campus systems: TBD
- C. Achieving carbon neutrality: TBD

**2. What are the pathways for meeting this cost? –** Capital campaign, tax credits, CapEx budget, cash reserves, debt financing, etc over 5+ years.

**3. What are the key outcomes? –** A high-performing campus that:

- A. Addresses human (our Acad, Res, Admin needs), environmental, economic and total societal impact;
- B. Results from the application of the highest level design, construction, operation and maintenance principles. (\*Source: National Institute of Building Sciences, Whole Building Design Guide)

# Idea 4A: Cost analysis

## Preliminary cost estimates for the WG Campus Core Plan

	AOS 1: Maintain the Status Quo	AOS 3B: Innovate for Impact (1)	WG' Campus Core Plan: Innovate for Impact (1)
	--	"Go for the Gold"	"Adaptive Reuse"
Life safety, MEP, exterior, facility renewal; escalated thru 2035	\$55M	\$27M	\$12M
MP demolition costs	\$0	\$2M - \$3M	\$50,000 – ???
MP remodel costs	\$0	\$13M – 15M (2)	\$27M -- \$33M (3)
MP new construction costs	\$0	\$42M – \$46M (4)	\$15M – \$17M (5)
MP site improvement costs	\$0	\$6M - \$7M	TBD
<b>Total MP construction costs (6)</b>	<b>\$0</b>	<b>\$63M - \$71M</b>	<b>\$42M - \$50M</b>

(1) Based on 2022 cost estimates for new const (\$450/sq ft) and median remodel costs (\$300/sq ft).

(2) Includes Castle LG, L2 and L3, OSH, and Kluge's E wing.

(3) Includes Castle L1-L4 and 50,000 sq ft of repurposed LC acad quad.

(4) Includes new dorm (40,000 sq ft) and 3 new acad bldgs (53,000 sq ft)

(5) Includes Castle addition or new UC bldg (16,000 sq ft) and new construction for lobby/circ in LC acad quad (19,000 sq ft).

(6) Excludes 20%-30% soft costs and 8.39% NMGR

## Idea 4A: Funding/financing strategies

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**Under development. The following will be considered:**

- Capital campaign
- Historic Tax Credits
- New Market Tax Credits
- CapEx budget
- Cash reserves
- Debt financing
- Other?

# Idea 4A Summary (Master Plan)

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## Discussion