

UWC-USA Strategic Plan
Phase I: Strengthening Our Foundations

Initiative Briefs

Strategic Goal #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.

Initiative 1A: Community Narrative (SPC reps: Andy and Melinda)

Objective: Create a concise and coherent document with our overarching cultural narrative (Ethos) and principles for action.

Summary: UWC is driven by its mission and 9 core values; however, there is not a cohesive narrative, or ethos, that allows us to explain exactly how this mission and the values infuse every aspect of the UWC-USA experience. Akin to a vision statement, the ethos is a coherent cultural narrative of UWC-USA that roots us in our history (UWC movement, Kurt Hahn, etc.) as well as our place (Northern New Mexico), and informs how we live our mission now and into the future. This document will be a touchstone that serves as a guide for internal practice (how we continue to emphasize a mission-driven narrative that supports our work) as well as external processes (how we tell this story to people outside of our community.) A central component of the narrative will be the Constructive Engagement of Conflict framework, and how we as a community develop and use this framework across academic, residential, and experiential education programming.

Initiative 1B. Employee Life Cycle (SPC reps: Hritik and Dr. Sam)

Objective: Develop plan that addresses recruitment, on-boarding, orientation, professional development, offboarding.

Summary: To develop a community of employees that is mission-driven and delivers mission-aligned programming to our students, we need to implement actions that will impact all aspects of the employee life cycle. We will need to review employee recruitment, on-boarding, development, feedback mechanisms, and off-boarding, and propose actions that make each of these processes more robust, transparent and mission-aligned. Employee retention is a key issue that will need to be addressed.

Initiative 1C. Support Structures (not assigned to a XFT)*

Objective: Build the structures needed to enable a successful implementation of the employee life-cycle plan.

*Determined by SPC to represent the implementation work for 1B.

Initiative 1D. Work Life Balance: Mission and Location (SPC rep: Dr. Sam)

Objective: Create opportunities to get the faculty and staff away from campus to re-energize.

Summary: Our first step as the 1D cross-functional team (XFT) will be to audit existing college-sponsored opportunities for faculty and staff to re-energize away from campus. What opportunities exist? What is their cost to the college? Are these opportunities utilized by faculty and staff? Why or why not? Our second step will be to consider faculty and staff needs and whether the college should offer additional opportunities to get away from campus. Or is there more that can be done on campus to help faculty and staff re-energize on site? Our third step will be to evaluate, from the perspective of our strategic objective, any property acquisitions or partnerships currently under consideration by the college that might serve these get-away needs. Our fourth step will be to imagine other cost-effective ways of meeting these needs, whether it be through access to new properties, forming new partnerships, or establishing new programs (e.g. sabbatical program). For existing or new opportunities, we should also think through issues of eligibility, sign-up, etc.

Strategic Goal #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.

Initiative 2A. Define Mission-alignment (SPC reps: Andy and Melinda)

Objective: Conduct an all-community study to determine what it means to be mission-aligned in the academic, residential, and experiential pillars.

Summary: It is understood within the UWC-USA community that the academics, experiential education and residential life should both express and serve the school's mission. While we share this sense of how things should be, we don't have in place the guidelines for aligning all programming with our mission or assessing the current mission-alignment. This context gives our 2A XFT its primary task:

- 1) To recommend a set of guidelines or standards for mission-alignment.

To fulfill this charge we will need to draw on existing resources (e.g. see resources gathered by the 1A XFT, including its first draft of a community narrative) and perhaps generate new ones, which altogether will amount to an adequate “all-community study.” Identifying existing resources will be most important since our time is limited.

If time allows, our 2A XFT might also consider the balance across programming and ask how well does this current balance reflect and serve our mission. This inquiry should proceed under the assumption that the IB Diploma Program will continue to anchor and structure the school’s academic program. Pursuing this inquiry could lead us to a second task:

- 2) To formulate a set of Coherent Action recommendations for striking a mission-aligned balance across our three programming areas.

Initiative 2B. Annual Plan (SPC rep: Victoria L)

Objective: Develop an annual program for intentional culture building in our learning and living environment throughout the year.

Summary: Our 2B XFT is charged with recommending Coherent Actions that will help develop programming--that is mapped onto the annual calendar--aimed at cultivating an intentional UWC-USA culture among leadership, faculty, staff, and students. We should focus our recommendations on programming that includes all students (or student groups) or all employees (or employee groups) outside the regular structure of academics, experiential education, and residential life.

A first step for our XFT is to take stock of existing programming that is designed for this purpose. A careful look at the school calendar reveals some of this programming: new employee orientation, employee/faculty orientation, student orientation, weekly student forum, regular faculty meetings, regular group chair/track leader/residential staff meetings, regular all employee meetings, Wednesday campus service, Wellness Week, CEC retreat, Southwest Studies, Second-year Success Week, Davis Finalist weekend, Annual Conference, Post-UWC Retreat, Post-Grad Experience, Leadership Expeditions, GLF staff training, alumni reunion, SLT retreats, and campus memorial services. Is this a sound list of programming that currently cultivates the UWC-USA culture? What is missing?

A second step is to consider SLT’s developing preferences for school calendaring, as they relate to culture building. Two of SLT’s preferences speak directly to the matter of culture building outside the regular structure of our programming. First, in the interest of thinning our calendar a bit and doing what we do better, SLT would like to look for more opportunities to view school life through the lens of a two-year cycle and schedule accordingly. This approach would recognize that some programming needs to happen every year, but other programming can

happen every other year so that all students experience it at least once. Second, going forward our calendar needs to reflect an emphasis on professional development for leadership/faculty/staff, community/culture building, and strategic plan implementation. More generally, SLT will look for ways to simplify experiential education scheduling, build into the calendar more un-programmed time for students, and create on the calendar more opportunities for connection between community members.

After we consider existing programming and possible modifications to our annual calendaring, our XFT will be ready to brainstorm needs and new ideas for an annual culture-building plan. *In what ways does our programming serve us well by building up a shared sense of our mission, values, and ways of proceeding? How does our current programming fall short of achieving these ends? What improvements might we want to recommend for improving current programming? What new programming might we want to recommend?*

Like all XFT's we need to be sure that we put forth a set of Coherent Action recommendations that adequately consider mission, budget realities, and student experience.

Initiative 2C. CEC as Foundational and Distinguishing (SPC reps: Andy, Naomi)

Objective: Identify and implement models to establish Constructive Engagement of Conflict as the distinguishing feature of UWC-USA.

Summary: Our 2C XFT is charged with making recommendations for Coherent Actions that would position Constructive Engagement of Conflict (CEC) as a foundational and distinguishing feature of UWC-USA. In order to advance the quality of recommendations needed to position CEC in this way, we will need to consider each of the following challenges or complications.

First, making CEC a more foundational and distinguishing feature of UWC-USA requires a disciplined review of all the training, initiatives, and programming that are currently organized under CEC, both in the Bartos Institute and experiential education track. The first move here is to make sure we understand and can define succinctly what CEC is at its core. Then, we'll need to get clear on what currently constitutes our CEC "program." Finally, we'll need to consider which of these trainings, initiatives, and programming really belong to a more streamlined and coherent CEC program. Otherwise, CEC risks remaining too diluted a "program" to become truly foundational and distinguishing. Here is one related question that highlights just one aspect of the internal fogginess about CEC: Is CEC the same thing as social-emotional intelligence education, is it becoming our social-emotional intelligence training program, or does doing CEC well require a certain level of social-emotional intelligence (which it needs to train for)? All three of these claims can be heard on campus, though they are never presented with the force of certainty.

Second, making Constructive Engagement of Conflict a more foundational and distinguishing feature of UWC-USA requires a critical examination of the current structures and staffing that support it. Currently, CEC occupies two places in our organizational structure. It is an initiative of the Bartos Institute and it is a track in our experiential education program. We also call it a “signature program.” This current structure is complicated by the fact that the Bartos Institute leader and CEC track leader is now the Dean of Students responsible for all residential life and all experiential education. It doesn’t seem that this configuration will allow CEC to become a foundational and distinguishing feature of UWC-USA. Such an aspiration will require greater simplicity and coherence in our structure and staffing.

Third, making Constructive Engagement of Conflict a more foundational and distinguishing feature of UWC-USA raises the question about the place of intercultural dialogue at UWC-USA. We recognize that conflict is inevitable in any community and constructively engaging conflict is an essential strategy for building a strong and healthy culture. In an international community such as ours, this might be especially true. In our unique context, we recognize that emphasizing skillful intercultural dialogue can also contribute to a strong and healthy culture. While this kind of dialogue does not prevent conflict, it can certainly reduce it. Therefore, as we consider the importance of constructive engagement of conflict in the orientation, ongoing training, and practice of all community members, we also need to think about the proper place of skillful intercultural dialogue. Is it wise to emphasize one without emphasizing the other? (NB: This concern for intercultural dialogue has emerged in the Community Narrative and Mission-Alignment XFT conversations.)

Once our XFT is dialed into these challenges and complications, we can begin to identify all the important questions that will drive our brainstorming. Eventually, this will lead us to the formulation of a set of Coherent Action recommendations for fulfilling this initiative. Like all XFT’s we need to be sure that we put forth a set of recommendations that adequately consider mission, budget realities/opportunities, and student experience.

Strategic Goal #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.

Initiative 3A. Decision-Making (SPC Rep: Hritik)

Objective: Develop systems for a collaborative, distributed and transparent decision-making process.

Summary: Our 3A XFT is charged with recommending Coherent Actions that will help develop the decision-making processes we aim to establish at UWC-USA. At the outset of our work, it would be good to define and consider each of these separately.

Collaborative decision-making, for our purposes, refers to two kinds of decision-making: 1) top-down decision-making that is consultative of stakeholders, and 2) bottom-up decision-making that follows a set of well-defined protocols.

In a number of ways we practice top-down decision-making that is consultative (e.g. presidential decisions made through deliberations with members of the SLT; SLT decisions on the strategic plan made with the input of cross-functional teams; Dean of Academics decisions made through deliberations with Group Chairs; etc.). *What recommendations might we want to make for improving collaborative decision-making at UWC-USA or for expanding it?*

Formal, bottom-up decision-making seems to happen less frequently within the school. A STUCO proposal adopted by the administration would be an example of this. *What recommendations might we make for a protocol by which students, staff, and faculty can formally present proposals to PLT, SLT or another body for consideration? Should we have one protocol for all stakeholder types or separate ones? It's likely the case that most proposals would concern either programming or operations? Should we have one protocol for both proposal types or separate ones? Is it reasonable to think that proposals would receive adequate attention at any point in the year, or should windows be established for their submission?*

Distributed decision-making or distributed leadership involves the distribution of autonomy, capacity and accountability across key positions in the school. It is not simply the distribution of tasks by a supervisor to direct reports, nor is it democratic decision-making. Organizational hierarchies remain intact, managing the distribution of actual decision-making across key positions.

In addition to tight alignment of personnel with school mission and values, distributed leadership requires the clear setting of parameters by supervisors, capacity building where needed, and a well-developed performance review system. We are particularly interested in this model at UWC-USA as it is a good strategy for navigating turnover among students, faculty and staff and for promoting excellence in a complex institution within a complex world--we need a leadership system not just leadership roles.

While we are beginning to practice an intentional distributed leadership, we have more work to do. A restructured SLT is allowing for more distributed decision-making at the level of the Deans, Chief Advancement Officer and VP for Finance and Operations. Decoupling the admissions and college counseling positions has also increased its practice, while the newly established Group Chairs and Residential Coordinators give us opportunities to expand distributed decision-making in the future. *What recommendations might we make for advancing distributed leadership at UWC-USA?*

Transparent decision-making, in our context, requires that all decision-making processes (top-down, bottom-up, and distributed), decisions and the rationale for these decisions are communicated clearly to other members of the school community. *What recommendations might we make for increasing transparency in any one of these decision-making processes or in all of them?*

Initiative 3B.1 Student Experience Systems (SPC rep: N/A)

Objective: Identify and develop systems to support and enhance student experiences in all areas of programming.

Summary: The work of our cross-functional team essentially began in January 2019 and centered on planning for a new Student Information System. Please see the [Appendix](#) for the development of this XFT. Since this planning effort continues, with an implementation date set for August 2020, we have limited the scope of our systems planning to the Student Information System and Learning Management System.

After reviewing a number of Student Information Systems, we determined that PowerSchool was the most agile system available to us. Unlike all other systems, PowerSchool representatives had concrete answers to all of our application requests and the software has numerous add-on modules which could potentially address other needs across the school. UWC-USA has entered into an agreement with PowerSchool and has begun a process by which the SIS and LMS systems will be implemented before the beginning of the next school year. These systems will serve needs across the academic, experiential education, and residential programs.

Initiative 3B.2: Student Experience Systems -- Admissions through Graduation (SPC rep: Virginia)

Objective: Identify and develop systems to support and enhance student experiences across the academic, residential, and experiential pillars.

Summary: The 3B.1 Student Experience Systems XFT used its meeting time to complete planning for the adoption of PowerSchool as the college's new Student Information System (SIS) and Learning Management System (LMS). Now that this planning is complete, more "systems" need to be considered under the Student Experience Systems strategic objective. Our cross-functional team, 3B.2 Student Experience Systems, will continue this work. First, we will need to consider which other existing student systems (or new ones) can and should be integrated with PowerSchool. These other systems might include admissions, transportation, and campus check in/out, just to name a few. The Special Assistant and/or IT Office will support our investigation of these possible integrations with PowerSchool. Second, we will need to

consider student experience more broadly--from admissions through graduation--and ask two questions:

- which existing systems or structures supporting student experience need to be improved or better integrated with others?
- where is there a need to create new systems or structures in order to enhance student experience?

Ideally, we will spend the bulk of our time over the next two months on this second investigation. Our challenge will be to identify the systems or structures that need to be improved, established and better integrated; then organize these various systems or structures into Coherent Action recommendations; and finally weigh the relative importance of each Coherent Action. Please see the SPC notes on the following page for some additional guidance.

Initiative 3C. Satisfactory Work Environment (SPC rep: Dr. Sam)

Objective: Adopt a design thinking approach to develop and implement key systems and protocols for operations.

Summary: Our XFT will need to work through the following three questions in our effort to identify needs in this area and develop Coherent Action recommendations to address them. The emphasis on design thinking above simply encourages us to carefully define the need we aim to address, consider who must be involved in addressing the need, and brainstorm many ideas for addressing the need -- all before we organize our ideas into discreet recommendations for Coherent Actions. Here are the questions we will need to think through:

1. Audit existing XFT recommendations: Which Coherent Action recommendations related to new "systems or protocols for operations" have already come forth from previous XFTs?

The quality of our work environment is influenced by many different operations within our school. Previous cross-functional teams have advanced recommendations for systems or protocols that would improve these operations and make for a more satisfactory work environment. We will start by looking at these recommendations under Goal #3 for sure, but we might also want to consider other recommendations that are likely to shape the work environment for employees. Please review existing [Phase I recommendations](#), focusing at first on the highlighted recommendations.

2. Consider needs identified by SLT: What additional needs related to new systems or protocols for operations has SLT identified?

In the context of your initiative, the SLT has focused its recent efforts on developing a leadership system to address the following needs:

- a. The need for a more comprehensive organizational chart that delineates leadership responsibility across all positions
- b. The need for a new committee structure to increase representation of faculty and staff at the leadership level, build leadership capacity across school departments, and facilitate year-long coordination within both programming and operations
- c. The need for a defined structure for working groups or task forces in order to accomplish needed objectives in a collaborative fashion

3. A final question for our team: Which other systems or protocols do we need to develop over the next 3-5 years in order to improve our operations and increase employee satisfaction?

Please consider this question assuming regular operations with full enrollment. We'll get there sooner or later!

Like all XFT's we need to be sure that we put forth a set of recommendations that adequately consider mission, budget realities, and student experience.

Initiative 3D. Internal and External Interfaces (SPC rep: Gianvi)

Objective: Develop technological tools and protocols to build strong points of contact among all members of UWC-USA community.

Summary: In our effort to identify needs in this area and develop Coherent Action recommendations to address them, our XFT will need to work through the following three questions:

1. Audit existing XFT recommendations: Which Coherent Action recommendations related to "technological tools and protocols" have already come forth from previous XFTs?

- a. 4C Zone Management Approach
 - Review systems for IT work orders, maintenance work orders, event requests, space reservations, transportation requests, and catering requests (to be moved to the 3D Internal and External Interface XFT)
 - Implement a better transportation system – School dude works somewhat well but people get mass emails for one large event (from 3B.2)
- b. 3B.1 Student Experience Systems: PowerSchool
 - PowerSchool replaces Edsby as school SIS and LMS and provides admissions office with a new Enrollment tool
 - Assess other software add-ons to PowerSchool to create better campus check in/out system
 - Investigate the use of PowerSchool's financial add-on (including tuition modules)
 - Investigate the use of PowerSchool's HR add-on

- Investigate the use of PowerSchool's transportation add-on
- c. 3B.2 Student Experience Systems: Admissions through Graduation
- Employ PowerSchool to improve ExEd coordination
 - Create a communications plan and streamline communications tools
 - Facilitate exchange of information, news, and resources among the UWC community
 - Adopt a system that would allow the tracking of incoming student's submitted documents
 - Create a database for the Davis Scholars program to benefit both Admission Recruiting & Advancement, and to keep track of our Davis Scholar Alumns
- d. 4A Sustainability and Resilience
- Establish and implement a plan for further developing our sustainability practice: comprehensive systems audits, goal setting, data collection and internal and external reporting (NB: new building sub-metering system is an important first step)
- e. 5B Fundraising Strategy
- A number of their recommendations involve the greater utilization of the Raiser's Edge database for data modeling, etc.

2. Consider needs identified by SLT: What additional needs for "technological tools and protocols" has SLT identified?

- a. Like the 3B.2 XFT, the SLT is interested in developing a communications plan and technological tools and/or protocols for streamlining communications. Are there specific elements for such a plan, tools, or protocols that you'd like to emphasize or advance by including it in your Coherent Action recommendations?
- b. The SLT would like to see the school adopt an institution-wide records management system. Developing Coherent Action recommendations to address this need will require us to consider these questions, among others:
- i. What paper records need to be retained and stored on campus? Which departments does this involve? What protocols and resources are needed to adequately keep these records?
 - ii. What electronic records need to be retained and stored on our network in our public drives? Which departments does this involve? Do these departments have documents and/or folders on Google Drive that need to be saved to our public drives? Do we need a protocol for naming files and folders? What other protocols and resources are needed to adequately store these records?
 - iii. Do we need to give guidance to employees on how to use their personal folders on the network drive and their personal folders on Google Drive for storing

- personal files related to their UWC-USA work? What about departments that have folders in both places? What about students?
- iv. How does employee use of Microsoft Office or Google Apps (Docs, Sheets, etc.) figure into all of this? Do we need to give guidance to faculty and staff on the use of these options as it relates to file generation, collaboration, and storage? What about students?
 - c. The SLT would like a set of user protocols to be developed for commonly used presentation and meeting technologies. Here are some examples that come to mind?
 - i. If someone needs to lead a audio-visual presentation in the Dining Hall, Sasakawa, or Kluge Auditorium, what do they need to know to set this up and execute it without having to rely on the IT Department? Screen, projector, lights, sound, etc.?
 - ii. What video conference technology will IT recommend for next year? Are there better options than Zoom? Google Meet? Others? Whatever the direction we go, what protocols should employees follow to hold a secure meeting on the proper account?
 - iii. If someone needs to host a video conference on a SmartBoard in the Castle Board Room, Dining Hall, Sasakawa, or Kluge Auditorium, what protocols should they follow to successfully hold a secure Zoom meeting on the proper account?
 - d. As of March, we have moved aggressively into the online learning environment and will likely remain active in this environment for a longer period of time and with different objectives in mind. What have we learned that we need to incorporate in future planning? What does our implementation of PowerSchool mean for decisions going forward? What other tools might we want to use or integrate into our current suite?
 - e. Are our student privacy policies and related protocols up-to-date and adequate for how we use Facebook Live and other broadcast tools?

3. Final question: Which other technological tools and protocols do we need to develop over the next 3-5 years in order to improve our internal and external interfacing? Please consider this question assuming regular operations with full enrollment. We'll get there sooner or later!

Like all XFT's we need to be sure that we put forth a set of recommendations that adequately consider mission, budget realities, and student experience.

Strategic Goal #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.

Initiative 4A. Sustainability and Resilience (SPC rep: Raechel)

Objective: Prioritize sustainability and resilience in all key decisions made by the school (e.g. purchasing policy, programming, etc.).

Summary: Over the last decade UWC-USA has made strides toward improving its sustainability practice. Highlights include establishing the campus farm; upgrading the efficiency of lighting, water usage, and heating in college buildings; sustaining a college recycling program; and supporting our students as they've become more active advocates on climate change and other ecological concerns. More recently, David Neidel, an alumnus in residence during the Fall 2019 semester, undertook a sustainability audit for the college. David has also worked with other members of the college community to promote a carbon offsetting proposal for student flight emissions, explore a framework for establishing ecological demonstration projects on campus, and revisit an earlier UWC-USA proposal for raising investor dollars to develop solar power projects on campus.

David reports that the college's sustainability audit is almost complete; we expect to submit it very soon to the Association for the Advancement of Sustainability in Higher Education (AASHE) for an official rating. The Sustainability, Tracking, Assessment, and Rating System (STARS) has guided the audit and focused our attention on 5 separate domains: academics, engagement, operations, planning and administration, and innovation and leadership. Looking ahead, our 4A. XFT will carry forward the sustainability efforts of the college, using the audit as our point of departure. More specifically, we will combine the findings of the audit with additional deliberations in the interest of formulating specific Coherent Action recommendations for prioritizing sustainability and resilience in all UWC-USA decisions.

Initiative 4B. Focused Capital Expenditures (not assigned to a XFT)*

Objective: Prioritize deferred maintenance and capital projects focused on historic buildings, classroom experience, sustainability and accessibility.

*Jonathan is implementing FYE '20 Cap Ex Budget and SLT will work with Jonathan to further develop the FYE '21 Cap Ex Budget.

Initiative 4C. Zone Management (SPC reps: Ben and Santos)

Objective: 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.

Summary: Zone Management is a management approach to all campus facilities and grounds. This approach is designed to increase role clarity and accountability across the custodial, maintenance and grounds teams; foster more meaningful relationships between facilities staff and facilities users; and promote a deeper sense of shared responsibility for campus upkeep. In our context, we are particularly concerned with improving the safety, cleanliness, and quality of campus spaces that most impact the experience of students, faculty/staff, and guests. This management approach starts with maintenance, grounds, and custodial staff under the supervision of VP for Finance and Operations and includes others through campus service and daily attention as appropriate. Our XFT will examine the viability of organizing our campus into zones (physical or otherwise) and periodically rotating crews from zone to zone. When dividing staff into zones doesn't seem viable (e.g. we have just two groundskeepers), we will recommend other actions for achieving the goals mentioned above.

Initiative 4D. Community Access (SPC rep: Virginia)*

Objective: Provide local access to UWC-USA while creating a safe and healthy campus environment for our students.

Summary: By "community" or "local" we certainly have in mind people from Montezuma and Las Vegas, but we should also think about northern New Mexico as a whole. The school identifies with this wider region in other ways so we should extend our sense of community or local to include it. By "access to UWC-USA" we mean access to the campus, campus events, and campus resources. In most cases this access would be in person on campus but it could also be remote and digital.

A good starting point for our XFT is to consider the existing opportunities for community access. Several opportunities come to mind: invitations to attend cultural shows, invitations to attend talks by guest speakers, invitations to attend the Annual Conference and other special programming, public tours of campus, participation in the get-away family program, volunteer work opportunities at the farm for student groups, campus space rentals for local organizations, and our partnership with The Friends of Montezuma Hot Springs. What else? I suppose we might also want to think about the local employee families and the local contractors that come to campus on a regular basis.

Once we complete a full inventory of existing opportunities, we can begin an assessment of these. *Do any existing opportunities prove so problematic that we should consider discontinuing them? Do we need to manage any of these differently to enhance local access? Do we need to*

manage any of these differently to enhance the safety and health of our campus environment? What new opportunities can we imagine for community access? Do we see any opportunities for sharing the UWC-USA campus experience with the local community through digital platforms? Answering these questions should help prepare us to recommend a specific set of Coherent Actions for achieving this initiative.

Like all XFT's we need to be sure that we put forth a set of Coherent Action recommendations that adequately consider mission, budget realities/opportunities, and student experience.

*The work of this XFT was suspended in the spring due to COVID pandemic concerns.

Strategic Goal #5: Advancement and Funding

Develop a sustainable financial model for UWC-USA to address the projected structural deficit in 2023.

Initiative 5A. Resource and Allocation Model (SPC rep: Raechel)*

Objective: Develop a resource and allocation model that is consistent with our mission, values, and local circumstances.

Summary: Develop a resource and allocation model that is consistent with our mission, values, and local circumstances.

Summary: Our 5A XFT is charged with developing recommendations for a new resource and allocation model that takes into consideration our mission, values and local circumstances. As we think about a new model, our starting point is our existing model which is detailed in our current 5-year budget projection. This model anticipates a structural deficit of \$2 million in FYE '23.

Two cross-functional teams (5B Fundraising Strategy and 5C/D Tuition and Alternative Revenues) have been asked to look at possible revenue increases to help close the anticipated \$2 million deficit. Both have completed their work and all recommendations and analyses they have generated have been shared with our team in the 5A XFT folder on Google Drive. Additionally, at Victoria M's request, Jonathan has begun an analysis of the expense side of our budget with the goal of identifying opportunities for achieving a 10-15% reduction for FYE '21, leaving aside any consideration of cuts that would reduce the number of school employees or the impact of our programming. Jonathan will make this developing analysis available to our XFT. Our challenge will be to bring all of this information together and identify other information that is needed, using it all to creatively and responsibly rethink our resource and allocation model.

Of course, circumstances around COVID-19 raise another set of budget questions for the 2020-21 academic year, which the SLT has begun to work on. We will not engage these questions in our work; rather we will stay focused on recommending a new resource and allocation model for a school with a full, on-campus enrollment of 230 students.

*The start of this XFT was suspended in the spring due to budget contingency planning related to the COVID pandemic.

Initiative 5B. Fundraising (SPC rep: Raechel)

Objective: Develop and execute a fundraising strategy to leverage our growing (and aging!) alumni base, friends, 40th and 50th anniversaries.

Summary: In order to address its annual \$2 million structural deficit and meet its commitment to diversity in its student body and excellence in instruction and programming, UWC-USA will commence planning for a Comprehensive Campaign. The comprehensive campaign will bundle annual fund goals (to raise a minimum of \$2 million per year for the duration of the Davis Family Challenge Grant period) with the need for \$40 in endowment support to balance its operational budget.

Initiative 5C/D. Tuition + Alternative Revenue Strategies (SPC rep: Gianvi)

Objectives: i) Develop a mission-aligned tuition strategy to make tuition a significant revenue stream while enhancing economic diversity; and ii) Develop an alternative revenue stream strategy that intentionally furthers mission, reputation, and/or visibility.

Summary: Under the current resource and allocation model, the school will face a \$2 million structural deficit in FY 2023. This funding gap needs to be closed in the short term through increases in Annual Fund revenue, tuition revenue, alternative program/workshop revenue and ancillary programming (e.g. facility rental) revenues. Beyond 2024 it is expected that growth in the endowment will yield larger annual distributions that should help consolidate a sustainable financial model.

Advancement expects that in the short-term it can grow the annual fund by \$750,000 to \$1.5 million (including new grant funding). If Advancement meets its high-end number, the school would need to bring in \$500,000 through increases in tuition, alternative program/workshop and ancillary program revenues. If the advancement office hits its low-end number, we would need to bring in \$1,250,000 through these other streams.

The following table shows recent revenue totals for each of these revenue streams:

	2018-2019	Annual Average 2016-2019
Annual Fund	\$2.2 million	\$2.1 million
Tuition	\$2.3 million	\$2.9 million
Alt. Programs and Workshops (total)	\$318,000	\$345,000
IB Workshops	\$326,000	\$306,000
GLF	\$52,000	\$39,000
Ancillary Programs (e.g., facility rental)	N/A	N/A

Our 5C/5D XFT will need to think across the tuition, alternative programs/workshops and ancillary streams, asking:

- 1) How can we best achieve annual revenue increases in each of these streams?
- 2) In the alternative program/workshop and ancillary streams, can we imagine new, mission-aligned programming that would bring in additional revenues?
- 3) How much additional revenue can we realistically expect to generate through these existing streams and new ones?

Initiative 5E: Meeting the Opportunities and Challenges of Our Campus Location (SPC rep: Hritik with much help from Anders)

Objective: To develop a host of specific strategies to help the school meet the opportunities and challenges of our campus and its location.

Summary: As the school President announced in February, the Board committee that conducted the campus location study completed its work in December and recommended to the Board that the school remain at its Montezuma campus. The Board accepted this recommendation at its February meeting.

In its process of interviewing current and past members of UWC-USA, current and past members of other UWC schools, alumni of UWC-USA and other UWC schools, representatives of local and regional organizations/institutions, and the UWC International Board, the committee identified 7 concerns to consider more closely. For each of these concerns the Board asked three questions: How significant is the challenge? Is the challenge getting worse or better? Is the challenge so severe that a move would be required?

Here are the 7 challenges and a very brief summary of the Board’s assessment of each:

- 1) Fundraising needs for repair/maintenance: a real challenge; current momentum indicates the potential for improvement; not a dealbreaker
- 2) Teacher/staff recruiting: a real challenge; while demonstrating clear positive momentum, it will require constant attention; not a dealbreaker.
- 3) **Local community opportunities**: do not pose a major challenge; there is room to improve relationships with the Las Vegas community; not a dealbreaker.
- 4) **Student activities**: not a severe challenge in Montezuma location; not a dealbreaker.
- 5) Safety and security: a moderate yet real challenge; positive momentum with current focus on campus safety; not a dealbreaker.
- 6) Environmental sustainability: a real challenge; recent momentum indicating improvement; not a dealbreaker.
- 7) **Competitiveness in student recruitment**: not a severe challenge; not a dealbreaker.

Highlighted above are the three concerns that have received the least amount of attention in the strategic planning process. Our XFT might want to focus on these as we develop recommendations for meeting the opportunities and challenges we see. Alternatively, we could focus on the concerns that are considered “real” by the Board committee, but we’d run the risk of redundancy as other XFT’s have considered these. Like all XFT’s we need to be sure that we put forth a set of recommendations that adequately consider mission, budget realities, and student experience.