

## TEMC 2015

**Technology assisted strategic planning in a complex environment; a global experience in a multi-state university**

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# Strategic Planning

Strategy = a plan of action or policy designed to achieve a major or overall aim

a plan, method, or series of maneuvers or stratagems for obtaining a specific goal or result

Plan = scheme or method of acting, doing, proceeding, making, etc., develop in advance

A Strategic Plan then would be a scheme or a method of acting or policy designed in advance to achieve a major or overall aim

# Simple enough

- Theoretically
  - Starting Point -> Goal
  - Starting Point -> Action -> Goal
  - Starting Point -> Plan -> Action -> Goal
- In Reality
  - Where do we start -> Whose Goal
  - Where do we start -> You Want Me To Do What -> Whose Goal
  - Where do we start -> Say what -> You Want Me To Do What -> Whose Goal

# Simple enough – so we thought

- But you cannot start at the Starting Point
  - Step 1 – These are our goals and this is how they are defined in our dictionary
  - Repeat - Step 1 – These are our goals and this is how they are defined in our dictionary
  - Our goals, our definition – focus – *our* goals, *our* definition
- Let's look at a simple agreed destination, visiting great aunt Bertha
- But how do we get there? Drive?
  - Google Maps of course
  - Turn on your Location first please
  - Would you also like to use the mobile tower location, Wireless location and GPS to help locate you better?
  - And what about a back up map
    - YES PLEASE, we can use all the help we can get finding where we are

# Thought you said it was simple

- Where were we then? Ah the Plan
  - In 100 Meters turn Left  
No, The OTHER Left
  - This is the last restroom in 100 KM, sure you don't want to stop
  - This petrol station doesn't take credit cards, do you have Cash?

Starting Point -> Plan -> Action -> Goal

Verified Baselines -> Common understanding of what to do -> Do -> Know your goals

- Has anyone actually seen great aunt Bertha's house? How will we know....

# It's been a trip

- Wait – But the inevitable ARE WE THERE YET?

ONLY if you were extremely Lucky, your GPS knew exactly where you were, you never missed a turn waiting for a satellite connection, you had actually saved enough cash for the trip, actually took the right lefts (or is it the left lefts?), didn't kill each other because someone actually didn't want to go to Bertha's house, the vehicle you chose was cooperative enough, you didn't get lost after the third orange detour sign, mom didn't lose her patience trying to herd you within the confines of the car, you synchronized your pit stops so you would actually make it to Bertha's house before she made the big trip to that other heavenly place, and if all went well – you actually recognized Bertha's house or Bertha after that ordeal

CAN WE SAY CHALLENGES OF A STRATEGIC PLAN?

# The secret to being lucky

- For the lucky ones

Starting Point -> Plan -> Action -> Goal

Verified Baselines -> Common understanding of what to do -> Do -> Know your goals

- For the rest of us Strategic Planning is more along the lines of

Starting Point -> Plan -> Action -> Goal -> Assessment -> Remediation -> Goal -> Assessment -> Remediation -> Goal -> Reminder of the original goal -> Remediation -> Additional Provisioning -> More Action -> Verify Destination

# We don't rely on luck..alone..

- The many millions of dollars and few years later question is

Will those tasks, plans, investments etc. get you to your desired outcomes?

- And the answer is “We are not going to wait to find out. We are going to use technology to monitor, mitigate, mend, and make it”



The vehicle you use to get there is important

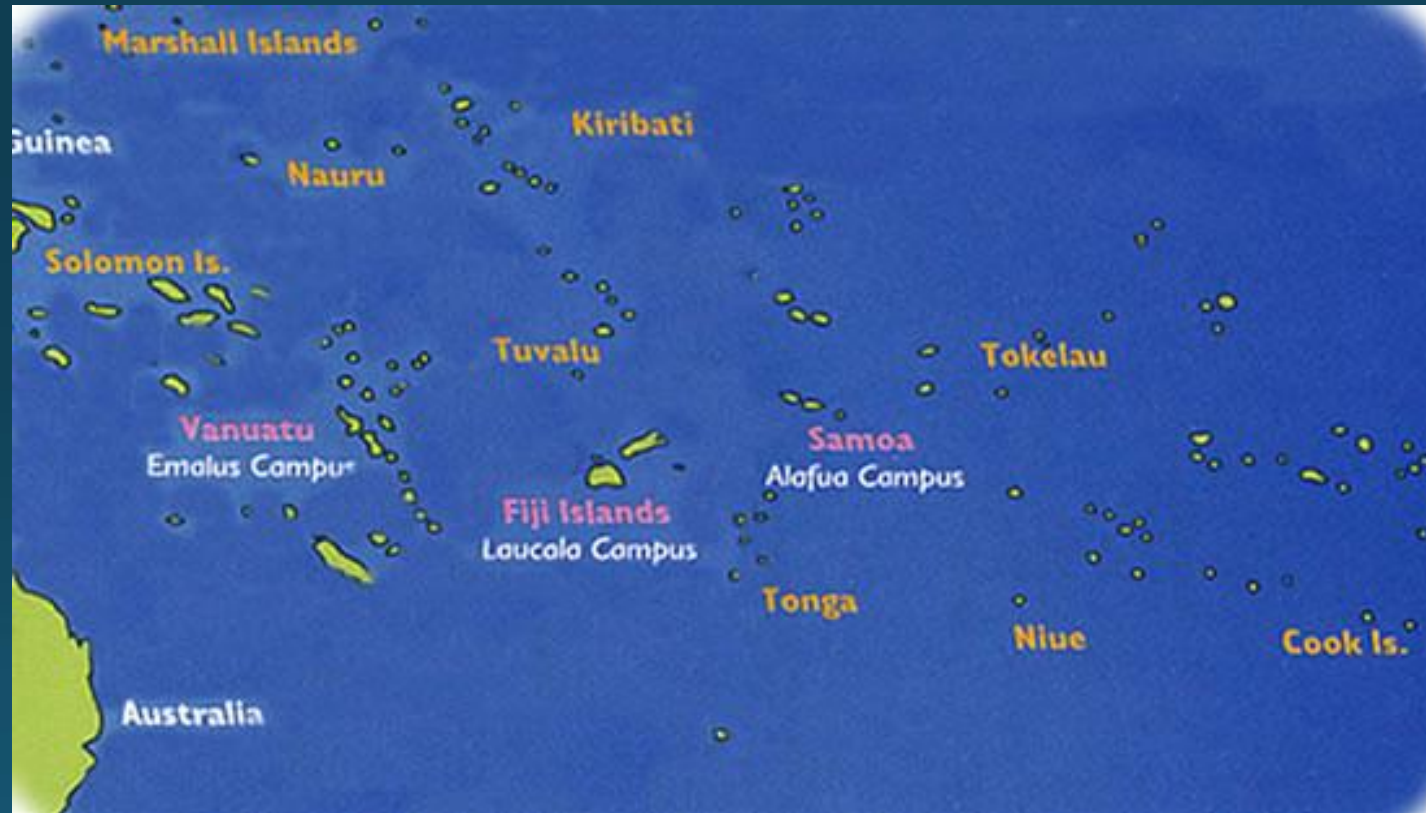


# The real journey

**Technology assisted strategic planning in a complex environment; a global experience in a multi-state university**

Spanning 12 countries, with 14 campuses, the University of the South Pacific is one of two regional universities in the world. As such, it has multiple stakeholders with diversity of national and educational agendas, faces challenges from emerging institutions in some nation states, competes in international markets and more than most other universities, is exposed to the impact of climate change. Its computer networks cover 33 million square kilometres. Significantly, USP has a wide global outreach. Unlike other multi country universities it operates as a single entity, with common academic programs delivered in each country, common policies and a single administrative infrastructure. Over many years, USP has used strategic plans to drive and measure improvement. The 2013-2018 Strategic Plan is geared towards transforming USP from a good to excellent university. Technology plays an integral role in monitoring, advancing, and adapting the University's activities in its mission of becoming an excellent university.

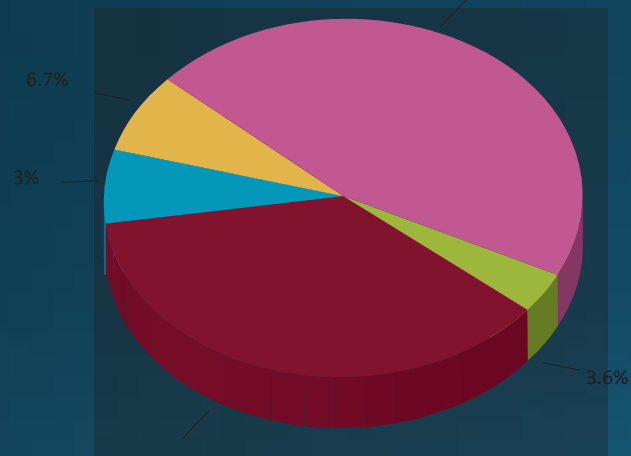
# The real journey – University of the South Pacific



# Complexity

Campus	EFTSU	Campus	EFTSU
Cook Islands	76	Nuie	6.6
Fiji - Labasa	473.3	Samoa	381,5
Fiji - Laucala	9231.6	Solomon Islands	1472
Fiji - Lautoka	672.3	Tokelau	32.5
Kiribati	319.3	Tonga	443.3
Marshall Islands	116.1	Tuvalu	72.9
Nauru	12.5	Vanuatu	1079.5
		<b>Total</b>	14390

# Modes of study



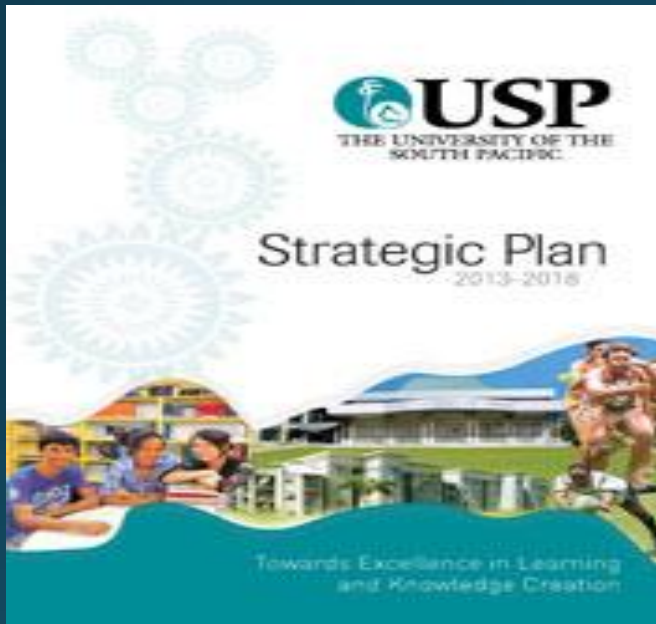
- Face to Face
- Blended
- On line
- Print
- FlexiSchool

# SP2013-2018

We are a Good university. By 2018 we want  
to be an Excellent University

What does that mean?

# SP 2013 - 2018



## • 7 Strategic Themes

- Learning and Teaching
- Student Support
- Research and Internationalisation
- ICT
- Regional engagement
- People
- Governance, Management and Continuous improvement

## • 22 Institutional KPIs

# in the beginning.. 2013

- Strategic plan (SP) is created with massive stakeholder involvement
- There are 22 institutional KPIs with well-defined objectives
- Baselines are drawn for each individual institutional KPI
- Clear cut goals are established for each institutional KPI
- The University vernacular is modified to bring the SP into every conversation
- From this point on you cannot have a conversation without saying SP2013-2018

AWARENESS; COMMUNICATION; BUY-IN; ONE FOR ALL AND ALL FOR ONE; TEAM WORK; KNOW YOUR GOALS, KNOW SUCCESS



# Past to present

- SPOMS  
STRATEGIC PLAN ONLINE MONITORING SYSTEM
- SPOMS 2010-2012
  - It was built as an online Strategic Monitoring tool
  - A listing of all strategic goals and related initiatives was put on a web page
  - Anybody assigned a strategic initiative could get online and mark what percentage of the strategic initiatives they had already accomplished. No vetting of the claims was required by the system
  - The monitoring tool was indeed just a reporting tool
- A reporting tool is marginally associated with planning and even less with mitigation and course correction

# Towards the future

- In 2013 SPOMS2 was built  
As a Strategic Plan *Monitoring* Tool

# Making it happen

- Architectural fundamentals
  - It starts with the established 22 Institutional KPIs and the desired outcomes
  - Each KPI has
    - A definition and current baseline data (starting point)
    - At least one established Outcome (goal)
    - Initiatives to achieve the outcomes
    - Tasks that will achieve the initiatives
    - At least one Senior Management Team (SMT) member is assigned Level 1 responsibility for each KPI
  - Every Level 1 is allowed to breakdown Outcomes into Level 2 Outcomes with contributory KPIs and related initiatives, to be accomplished by a new set of tasks, with assigned responsibility to Level2 Managers

# Making it happen...

- Architectural fundamentals
  - It starts with the established 22 Institutional KPIs
  - Every top Level(n) 1 is allowed to breakdown Outcomes into Level(n+1) Outcomes with contributory KPIs and related initiatives, to be accomplished by a new set of tasks, with assigned responsibility to Level(n+1) Managers
  - Similarly Level(n+1) managers can create more granularity and assign it to Level(n+2) mid-level managers and so forth
  - For any Task to be marked as accomplished
    - The assigned Level(n) manager has to upload evidences into the system
    - Only Level (n-1) can mark the task completed after analyzing and accepting the evidences

# Making it happen...

- Architectural fundamentals
  - It starts with the established 22 Institutional KPIs
  - Every Level (n) is allowed to breakdown KPIs into Level(n+1) KPIs
  - Level(n)Tasks and Initiatives can be marked completed only by Level(n-1)
  - Each activity at every level is assigned a timeline
  - The system is a live monitoring system
  - Every Level(n) can see the state of affairs of the overall SP, their own, and that of every Level(n+1) they assigned something to
  - SPOMS2 provides live dashboards

Starting Point -> Plan -> Action -> Goal

# Making it happen...

- Starting Point -> Plan -> Action -> Goal
- We had the starting baselines, we had the goals, we had the actions needed, for The Plan to be complete, we needed to associate funding with initiatives
- Layer2 (Different from Level2)
  - Establishment of an SP fund
  - Allocation of SP Funds to specific initiatives
  - Level(n)s became fund controllers and could allocate their SP funds to Level (n+1)s
- Layer2 is an associated layer, i.e. the system was ad-hoc linked to Budgets
- Layer3 associated Level(n) KPIs to individual KPIs in HR's Performance Monitoring system

# Alignment to individuals



Working in:	3212 >>> Human Resources
Position:	FRG359/00
Academic Level:	HRMIS Assistant Analyst
Joined the University:	2nd April, 2012
Contract Range:	2nd April, 2012 >>> 1st April, 2015
My Job Description:	<a href="#">Link</a>
My Workload:	<a href="#">Link</a>
Supervisor:	Melvin Ramkhelawan
Performance Appraiser:	Irfaan Khan
Qualification:	BA [S.Pac]

## Performance Achievements

Percentage	Priority	Category	Performance Achievement	Performance Indicator	Timeframe	USP Goal
100.00		Learning and Teaching	123	123	dec 2013	Priority Area 1 - Learning and Teaching

1 Row

## Development Plan

Year	Skills & Knowledge To Be Developed	Proposed Actions
2013	test	test
2013	test	test
2013	1	2

3 Rows

# But...

- We soon found out that

Starting Point -> Plan -> Action -> Goal was a good start. However...

Start = perhaps not so good baselines

Plan = Often did not move in the right direction, given not so good starting points, shifting timelines, and dependent variables becoming problematic

Action = Completing tasks became more important than achieving goals

Goals = some over ambitious targets; some so far out time wise that they were out of sight; some lost priority with changing personnel



# However...

- This is fixable

Starting Point -> Plan -> Action -> Goal

Verified Baselines -> Common understanding of what to do -> Do -> Know your goals

Start = Baselines were re-evaluated and modified where necessary

Plan = Without moving the goal posts, mitigation plans were introduced for course corrections with new intermediate goals

Action = Establishing regular meetings with Managers and enforcing project management rules ensured positive traction and forward motion

Goals = No Level 1 goals were changed. The rest were adjusted to maintain line of sight

# Has anyone actually seen great aunt Bertha's house? How will we know.....

- One piece at a time of the jigsaw picture puzzle
  - Initiatives -> Broken into understandable tasks
  - Goals -> Broken into smaller targets for tasks and initiatives
  - Responsibility -> Delegated and oversight provided
  - System -> Integrates everything vertically in a pyramid shape.
  - Success -> Defined by institutional KPIs and Goals, and made visible through the pyramid of SPOMS2
  - INSURANCE -> Mid-term evaluation of SPOMS2 and course correction to guarantee that the sum and relevance of all tasks and goals will indeed add up to the desired Outcomes for the 22 institutional KPIs by 2018

And here we are!



# Strategy for Strategic Plan success

- Tell me what it means in a language I understand
- Translate the abstract to the practical
- Give me something specific to do and achieve
- Give me the right tools and resources to do what I need to do
- Communicate with me
- Remind me
- Monitor me to make sure I am on the right path; refocus me
- Show me where I fit with what I do
- Share information with me; enthuse me with success stories
- Motivate and challenge me by showing me where we are headed and how my contributions help us get there
- Reward us with success

# Contacts

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*"The road to excellence is not to be paved with incidentals, rather with deliberate plans and actions"*

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