

Strategic Planning Retreat

Review and Renewal of UBT Strategic Priorities and Future Direction

13th-14th Sept 2023

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Strategic Planning Retreat Workshop

Day One

Time	Activity
8:30-8:50	Registration
8:50-9:00	<ul style="list-style-type: none"> ● Opening remarks by UBT senior management ● Introduction of the facilitators
9:00 – 9:15	<ul style="list-style-type: none"> ● Introduction of the program: key objectives and expectations ● Organize UBT's team into cross-functional teams and identify roles to ensure success of the workshop
9:15-9:45	Sessions (1): Strategic planning framework and renewal journey <ul style="list-style-type: none"> ● Strategic Planning Framework ● UBT SP Review and Renewal Journey and expectations
9:45-10:30	Session (2): Context Analysis (<i>What has changed since our last Strategic Plan; Where are we now; and What will shape our future?</i>) <ul style="list-style-type: none"> ● Change imperatives in higher education globally and in the KSA. ● Summary of Market Research and baseline assessment
10:30-10:45	Coffee Break
10:45 – 11:00	Session (3): Understanding the key elements shaping VMC (<i>SP Review Template</i>) <ul style="list-style-type: none"> ● UBT Mission statement (Why do we exist?) ● UBT Core values (What do we stand for?) ● UBT Vision (Where are we heading?)
11:00 – 12:30	Session (4): SWOT Analysis and Stakeholder Analysis <ul style="list-style-type: none"> ● SWOT Analysis (<i>SP Review Template</i>) ● Stakeholders' Analysis (<i>SP Review Template</i>)
12:30 – 13:15	Prayer and Lunch Break
13:15 – 14:15	Session (5): UBT Strategic Plan Model: Strategic Themes and Enablers <ul style="list-style-type: none"> ● Refresher on UBT strategic themes <ul style="list-style-type: none"> ◆ What are strategic themes? ◆ Articulating UBT strategic themes and strategic enablers ● Introducing “Start – Stop – Continue” Strategic thinking tool
14:15 – 15:45	Session (6): Review UBT Goals, Objectives and Initiatives (<i>SP Review Template</i>) Theme & Enablers Group Discussions– using “Start – Stop – Continue” tool
15:45 -16:00	Coffee Break
15:45 – 17:00	Session (6): Review UBT Goals, Objectives and Initiatives (<i>SP Review Template</i>) (Continue)
17:00	Day One Close.

Strategic Planning Retreat Workshop

Day Two

Time	Activity
8:30-8:50	Registration
8:50 – 10:00	Session (6) Continue: Review UBT Goals, Objectives and Initiatives <ul style="list-style-type: none"> ● Group work: Theme & Enablers Group Discussions _Consolidation of output <i>(SP Review Template)</i> ● Group Presentations
10:00 – 10:45	Coffee Break
10:45- 12:30	Session (7): Putting the plan together <ul style="list-style-type: none"> ● Group Work: Theme/ enabler plan <i>(SP Review Template)</i> ● Team presentation – each theme
12:00 – 12:45	Prayer and Lunch Break
12:45 – 15:45	Session (8): Aligning UBT Strategic Projects with OKR <ul style="list-style-type: none"> ● What is OKR? _ Primer on OKR ● Determining UBT major strategic initiatives and projects ● Discussion on UBT projects success indicators
15:45 -16:00	Coffee Break
16:00 – 16:30	Session (8): Continue <ul style="list-style-type: none"> ● Defining required resources, and estimated budget for each project
16:30-16:50	Session (9): UBT Strategic Planning implementation <ul style="list-style-type: none"> ● Discussion on the implementation of UBT plan 2024-2028: Monitoring and Accountability
16:50-17:00	Concluding remarks and program closure

Workshop Objectives



- ◆ Share the strategic planning framework and the process for review and renewal
- ◆ Facilitate the review and articulation of UBT's mission, vision and core values.
- ◆ Discuss local and global context and implications for UBT future direction.
- ◆ Conduct UBT institutional SWOT and stakeholder needs analysis
- ◆ Review / revise UBT strategic themes / enablers using Start - Stop-Continue approach
- ◆ Identify major strategic projects that UBT would commit over the next five years to achieve its strategic goals.
- ◆ Discuss and agree of the UBT strategic plan governance and accountability arrangements.



Sessions (1): Strategic planning framework and renewal journey

"Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world."

Joel Barker

What is strategy?

“The essence of strategy is choosing to perform activities differently from competitors so as to provide unique value proposition”

“Strategy is the way an organisation seeks to achieve its vision and mission”

**“Strategy specifies what you decide
“TO DO” and “NOT TO DO”.**

**Michael Porter, Professor and
Director of the Institute for Strategy and Competitiveness at
Harvard Business School**



What is Strategic Thinking?

Strategic thinking involves "arraying options through a process of opening up institutional thinking to a range of alternatives and decisions that identify the best fit between the institution, its resources, and the environment"

Rowley, Lujan, & Dolence, 1997, p. 15.

“Strategic thinking is the ability to analyse influencing factors inside and outside the organization, to discover strategic direction that should guide the organization’s decision-making and resource allocation for a period 3-5 years”

John Pisapia (2010), Transforming The Academy: Strategic Thinking and / or Strategic Planning, Presented at the American Institute of Higher Education - 4th International Conference March 17-19, 2010, Williamsburg Virginia, USA

What is strategic planning?

Strategic planning is an organization's process of defining its strategy, or direction, and making decisions on allocating its resources to pursue this strategy.

Source: Wikipedia

Strategic planning is a comprehensive process for determining what a business should become and how it can best achieve its goals. It appraises the full potential of a business and explicitly links the business objectives to the actions and resources required to achieve them

Darell K. Rigby (2013). Management Tools 2013: An Executive Guide. Bain & Company

The Burning Platform!!

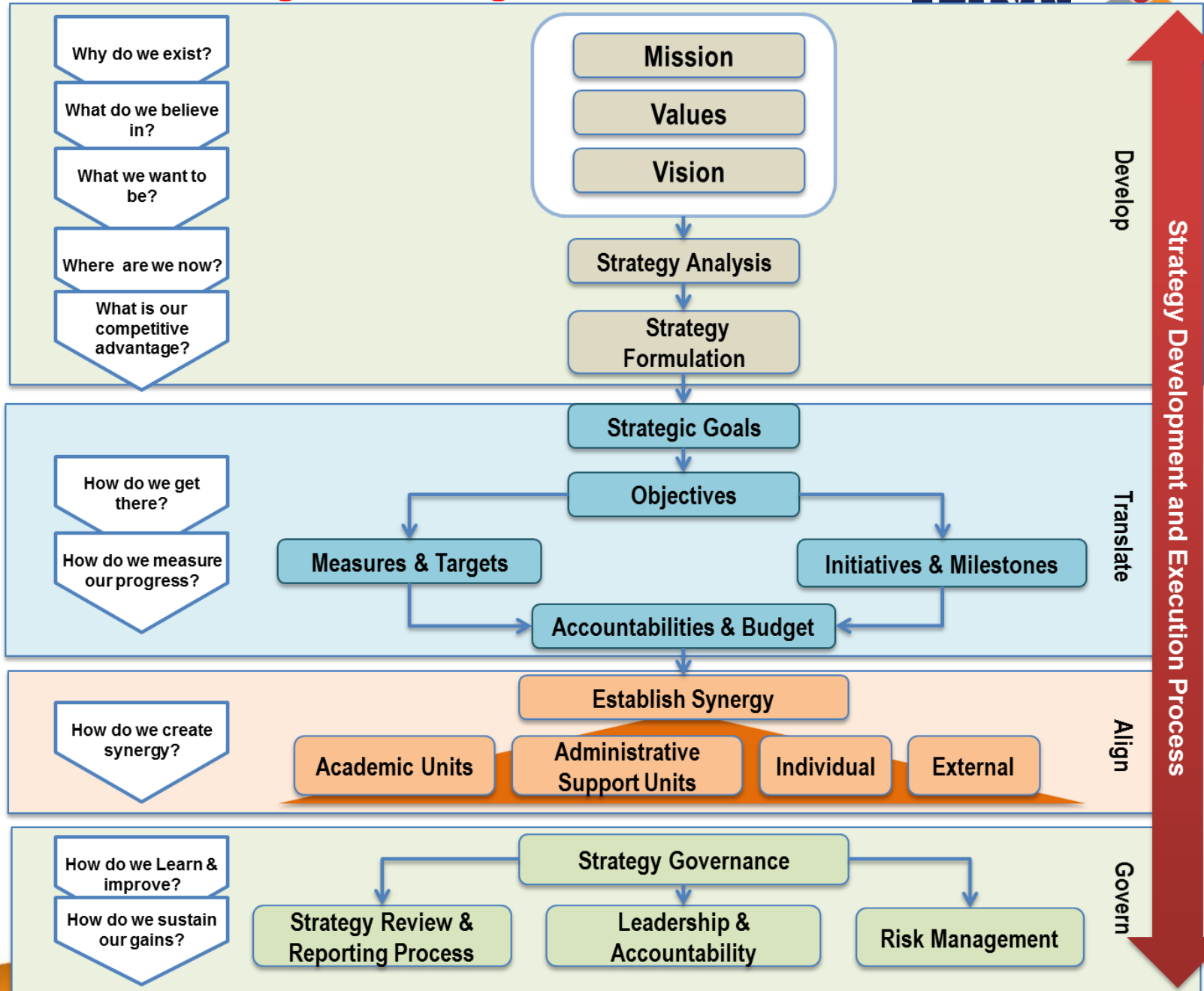
“Less than 10% of strategies effectively formulated are effectively executed”

Fortune Magazine

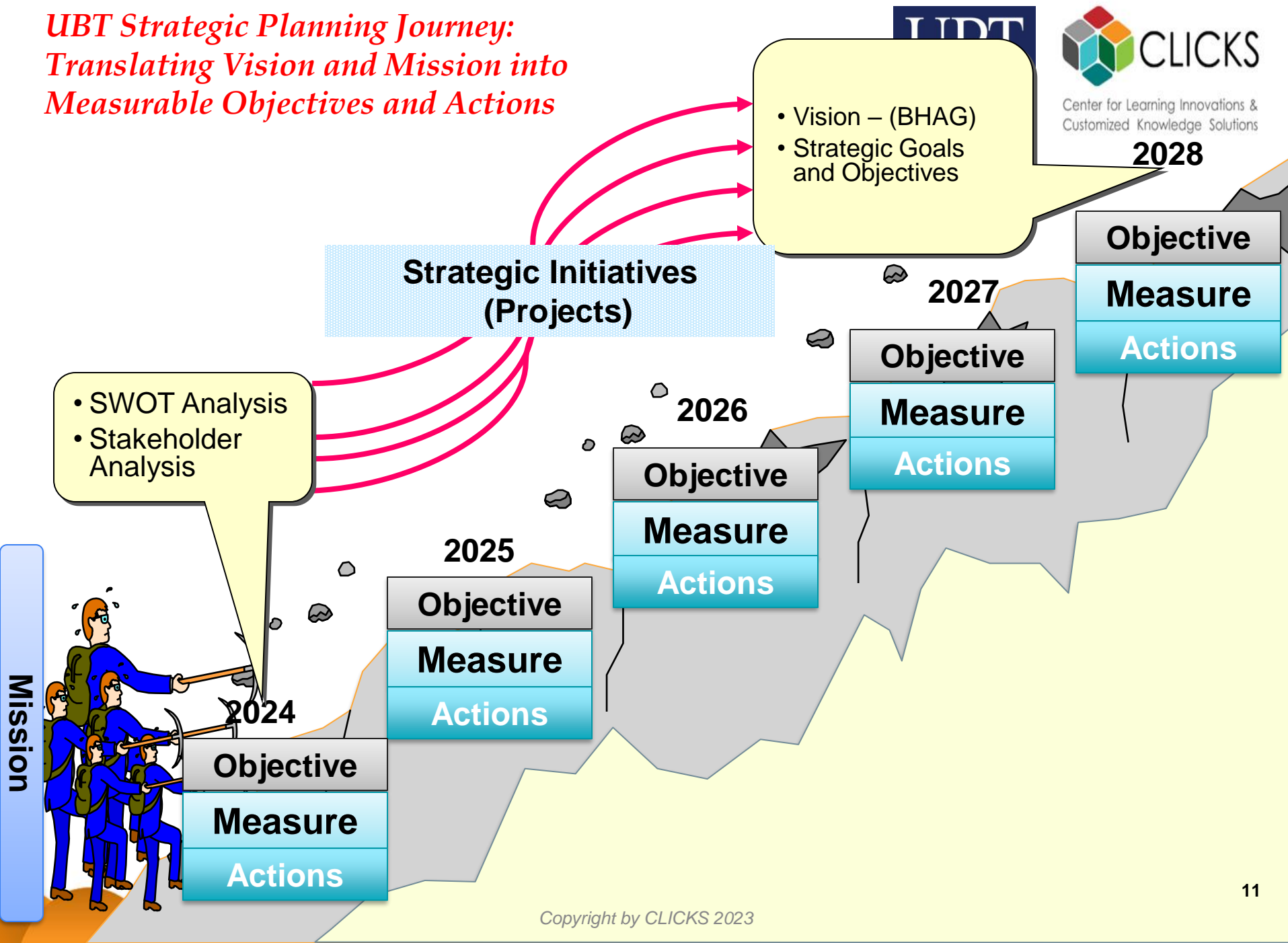
90% of organizations do not execute strategy successfully



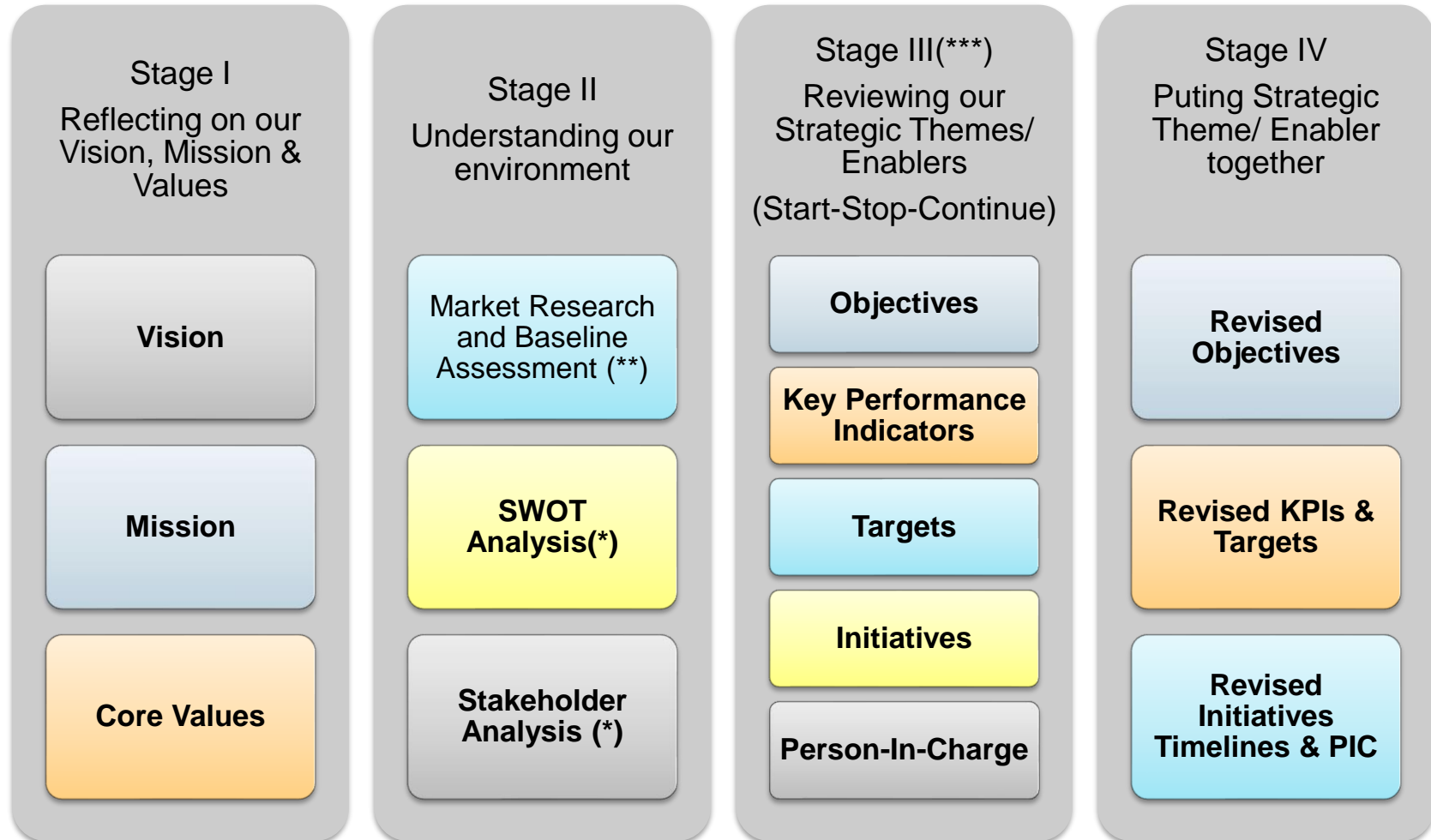
CLICKS _Strategic Planning Framework



UBT Strategic Planning Journey: Translating Vision and Mission into Measurable Objectives and Actions



UBT SP Review and Renewal Process



(*) The review to be based on the strategic themes/ enabler assigned to the group

(**) The market research and baseline assessment are prepared by CLICKS.

(***) The review will be based on the UBT Strategic Plan 2019-20203, using information gathered from Stage II.

UBT Strategic Plan (2024-2028) Review and Renewal: Data gathering and stakeholder engagement timeline (June – September 2023)



UBT Board Vision and Priorities

Board vision, focus and ideas for the future of UBT.

10 June 2023

UBT Management Team Issues and Priorities

Engagement sessions with the management team on what worked, what didn't, and the challenges faced during SP cycle 2019-2023.

10-11 June 2023
18-19 June 2023

University, Colleges and Departments Plans and Reports

Colleges and departments strategic plans and achievement reports 2019-2023.

Supporting data and documents shared by VRQD

UBT Staff & Student Surveys

Think UBT 2028 staff survey

Student satisfaction survey

Market Data & Analysis

Market Research and Baseline Assessment Reports

Sharing session with UBT management and heads of departments
03 Sept 2023

Strategic Plan Retreat

Strategy meeting with UBT C-suite

12 Sept 2023

Strategic Planning Retreat with UBT staff and stakeholders
13-14 Sept 2023

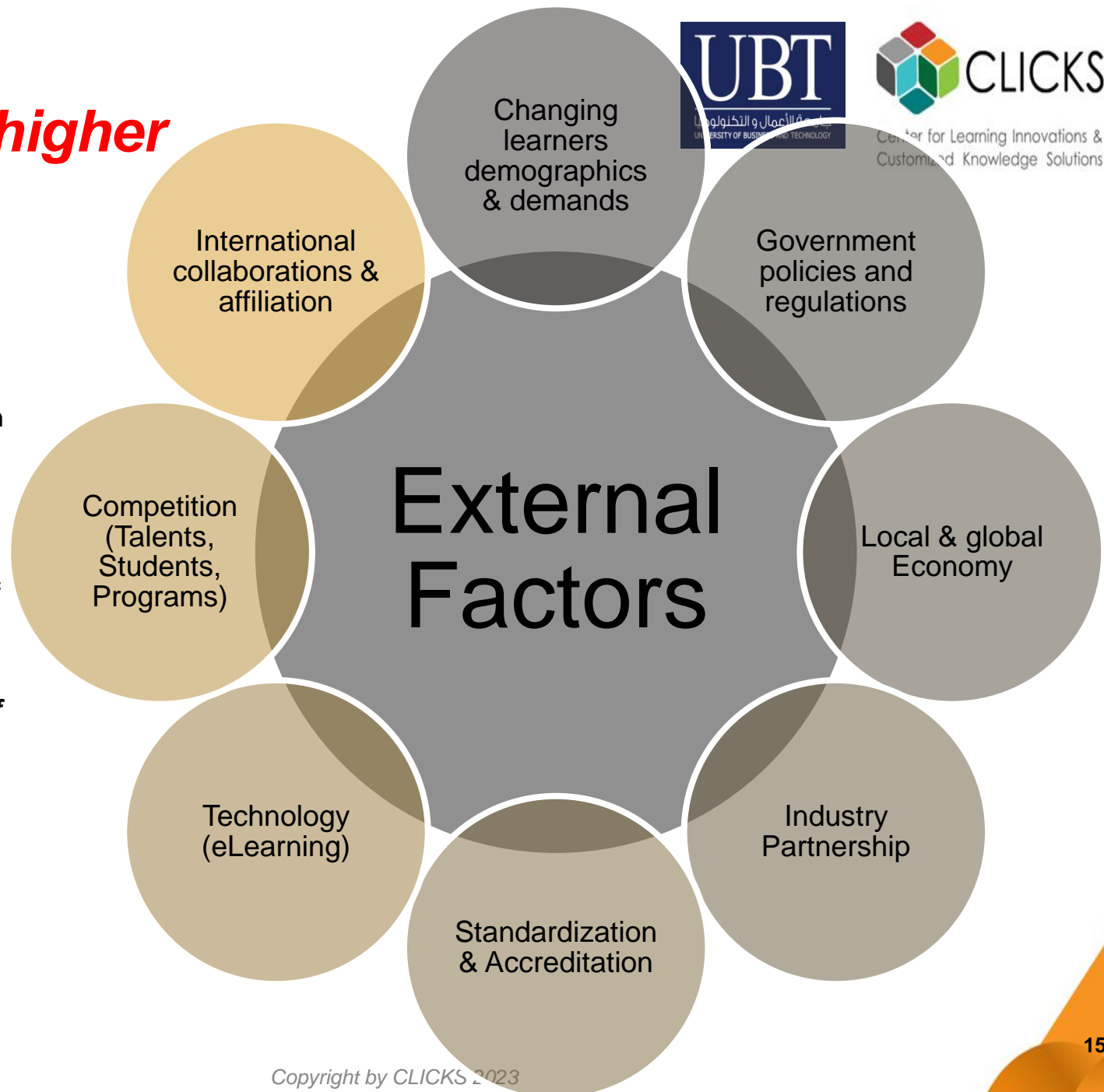


Session (2): Context Analysis

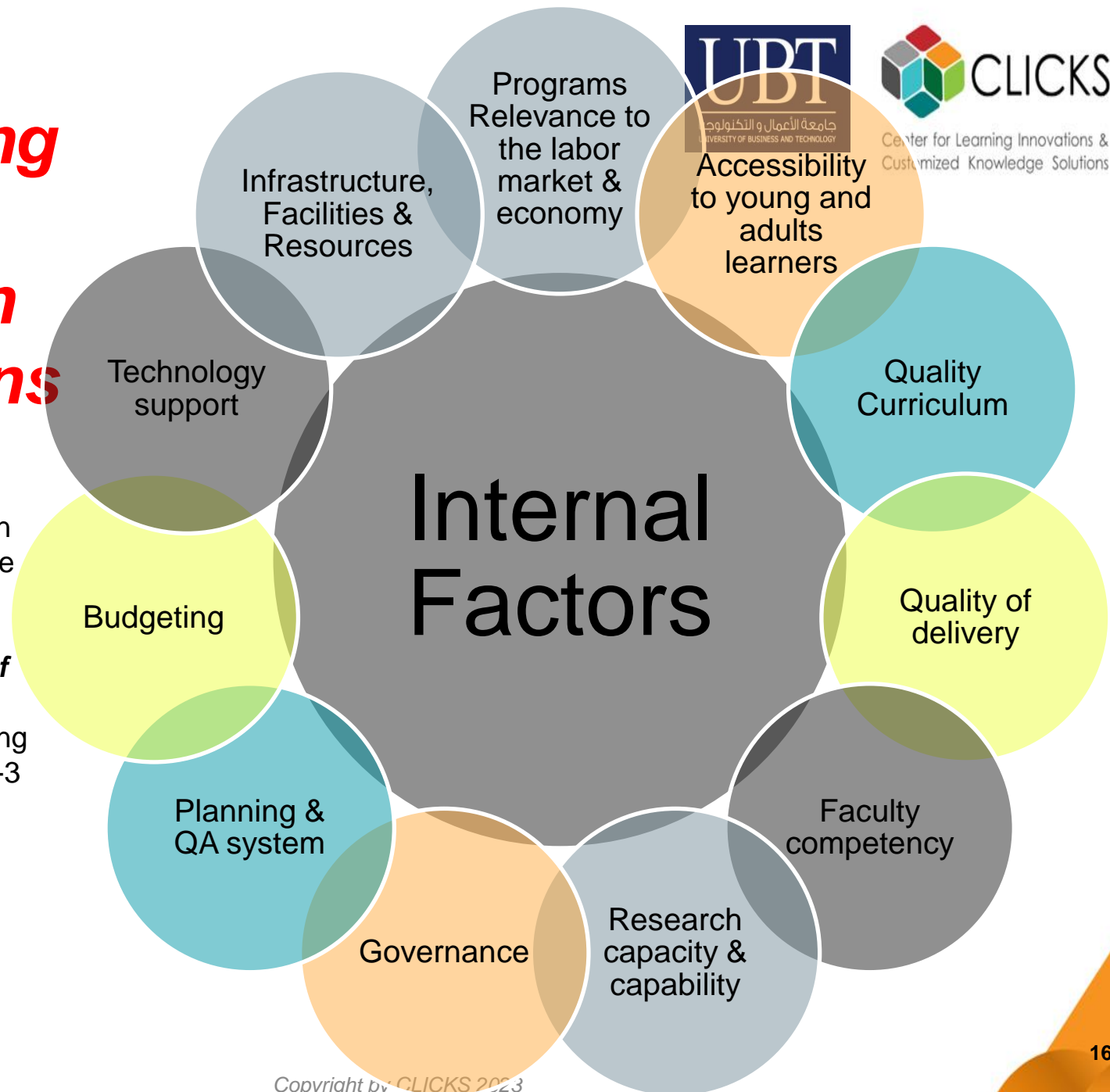
***What has changed since our last Strategic Plan;
Where are we now; and What will shape our future?***

Factors influencing higher education institutions

- Does the university plan consider some of the possible factors which might face the institution or does it appear to neglect consideration of critical uncertainties which could occur?
- Are the **implications of these factors** for the more immediate planning horizon (say the next 1-3 years) considered?



Factors influencing higher education institutions



- Does the university plan takes into account these factors?
- Are the **implications of these factors** for the more immediate planning horizon (say the next 1-3 years) considered?



Summary of UBT Market Research

Recommendations for UBT's Future Direction 2024-2028

Copyright by CLICKS 2023

Recommendations for UBT's Future Direction 2024-2028

- Opportunities for widening access to education and increasing student enrolment
- Responsive transformative educational pedagogy
- High Quality Degree/ Professional Certificate Programmes with Specializations
- University-Industry-Government Partnership

Market Research Recommendations:

Opportunities for widening access to education and increasing student enrolment



- Designing and developing **professional programs for re-skilling and up-skilling women** in the relevant areas of business and technology.
- Exploring government initiatives for women such as Wusool Program; Qurrah Program and Women Leaders Program 2030.
- UBT should explore technology to design and deliver highly responsive programmes that **accelerate the development of talented leaders** and widen access in education in area where UBT can leverage its expertise with a focus on innovation.
- The **employment gap** in the kingdom provides an opportunity for UBT to consider developing niche and innovative programs with specializations or short professional certificates in areas outlined in the KSA Vision 2030.

Market Research Recommendations:

Opportunities for widening access to education and increasing student enrolment



- This population distribution opens opportunities for UBT to develop a marketing strategy that expands **UBT's footprints in other cities**.
- This does not only mean opening new branch campuses in other cities, but also carefully **crafting marketing, promotion and recruitment strategies to attract quality students from these cities to UBT**.
- Having conducted feasibility studies in these cities, UBT may consider new initiatives combining **blended learning with recognition of prior learning and remote delivery**; such as developing new short/ degree programs (e.g. Mecca – Tourism & Hospitality), deploying an innovative eLearning platform to facilitate access to predominantly women who prefer to study from home.

Market Research

Recommendations: Opportunities for widening access to education and increasing student enrolment



- UBT needs explore **working with selected schools**, especially with secondary, to **co-design bridging programs that prepare them for university education**. This can serve a pipeline for enrolment to UBT programs as well as a fulfillment of social responsibility aligning with KSA needs.
- The demographic school information, including the skill gaps (PISA), the potential increase in student numbers are among the most important factors to consider in case of **new campus establishment and or/new program launching**. The market research figures strongly support educational institution development in the cities of **Riyadh and Makkah, followed by Eastern Province**

Market Research Recommendations:

Responsive Transformative Educational Pedagogy



- Adopt a **transformative educational pedagogy** providing practical and hands-on experiences that can be injected into the curriculum and co-curriculum, especially in the first two years (Undergraduate).
- More integration of approaches adapted from workplace training and apprenticeships to serve as a more practical model for assessing learning.
- To align with the KSA vision, the education system must focus on nurturing creativity, critical thinking, and problem-solving skills to cultivate the next generation of innovative leaders.
- Consider the shift from summative assessments and fact recall to context-specific applications and formative assessment.
- Consider techniques such as self-assessment, peer-assessment, and qualitative assessment, and leverage to complement traditional mechanisms.
- Gradually consider technology-based behavioral tools to measure cognitive, social, and emotional learning.

Market Research Recommendations:

Embracing Digital Transformation

- Information Technologies, Telecommunication, Networking and Software Engineering graduates will witness an increase in demand as they are key contributors to the success of the government operational excellence theme.

Market Research Recommendations: Social Empowerment

- Embedding social and volunteering values, ethics and practices in Higher Education Graduate attributes and Extracurricular activities will allow any HEI to position itself as a major contributor to this theme.

Market Research Recommendations:

High Quality Degree/ Professional Certificate Programmes with Specialization



- Focus on bridging the competitive gap by offering a short and certificate programs aligned with vocational needs of students and the industry.
- Capitalize on technology as a competitive lever to design and deliver online/ hybrid programs combined with on-job training.
- Deepen industry partnerships to align curriculum with the industry, enhance field practice and increase employability.
- For renewable energy projects, KSA requires expertise in Engineering, Environmental Science, and Sustainable Technologies
- For the tourism sector, KSA needs expertise in Artificial Intelligence, Data Science and Cyber security

In line with the KSA 2030 mega projects:

- Specializations/ certificate courses that support environmental engineering and sustainability projects.
- Specializations/ certificate courses that focus on tourism and hospitality industry
- Collaborative-interdisciplinary programmes that focus on the application management in heritage management, well-being services, healthcare management, etc.

Market Research Recommendations:

University-Industry-Government Partnership



- The education-industry-government collaboration will help design a curriculum that meet employer demand and facilitate internship opportunities to bridge the gap between academia and practical skills.
- UBT partnership with government should pave the way to raise research fund to mega projects in the next 5 years.
- Attract scholarships through collaborative arrangements with the government, industry and international links.



Summary of UBT Baseline Assessment

Recommendations for UBT's Future Direction 2024-2028

UBT Strategic Plan 2019-2023: Common

Recommendations for Continuous Improvement



Strategic Plan Implementation and Reporting

- Make sure all institutional KPIs are consistently monitored and reported. In case of unavailability of measurement, owner must provide rationale, with actions for improvement.
- Establish a clear aggregation formula, and ensure it is consistently applied at appropriate levels.
- Streamline the initiatives definition and purpose. Establish a clear responsibility for the overall coordination and monitoring of the implementation of the initiatives.
- Establish a clear policy/process for strategic plan and KPIs update and adjustments as per UBT needs and adaptability to its environment.
- Adopt appropriate mechanisms to align operational plans and adjust them to meet the institutional KPI target and improve UBT agility to implement corrective measures.
- Consider homogeneous KPI reporting and measurement across colleges

UBT Strategic Plan 2019-2023:

Common Recommendations for Continuous Improvement

Strategic Plan Governance

A strategic plan will not add value to an institution without an active governance and accountability process. Therefore, UBT must ensure in the next planning cycle the following:

- Activation of UBT Strategic Planning and Resources Committee (under the UC)
- Appropriate councils/ committees are actively involved in the overseeing / discussing progress , reviewing strategic plan performance reports.
- Leaders assigned the task to lead certain KPI/ initiatives are held **accountable**, provided they are given the resources and necessary support to meet the set objectives.
- the strategic plan cascading process is reinforced to facilitate implementation, accountability and effective coordination.
- Organization structure changes should be thoroughly mitigated (at worst minimized) to avoid the risk of failure to execute the strategic plan.
- Resources shall be aligned with the university SP, this include competent human capital

UBT Strategic Plan 2019-2023: **Area-Specific** Recommendations for Continuous Improvement



Holistic Student Experience Achievements

- Focus on students' satisfaction and a transformative (360 degree) student experience
- Focus on entrepreneurship mindset and capabilities
- Develop a teaching and learning strategy and major initiatives that support the concept of transformative learning experience.
- Revamp UBT's marketing and promotion plan and accountability structure

High Quality Market Driven Programs

- Clearly track of KPIs related to students' experience separately by campus
- Assess current programs thoroughly to ensure they continue to be of relevance and to address emerging trends in the field and support education for employment.

UBT Strategic Plan 2019-2023: **Area-Specific** Recommendations for Continuous Improvement



Research with Tangible Impact

- UBT to continue hiring research-active doctoral faculty to sustain/ enhance its international ranking and enrich its curriculum.
- Review the research framework and responsibilities to ensure appropriate coordination for better achievement and alignments with required UBT capabilities.
- Consider specific indicators to improve students' research contributions and research inclusion in academic curricula.

Deep Engagement with Wider Community

- Ensure there is appropriate leadership and coordination cross the university entities where it comes to community engagement activities.
- Align community engagement initiatives to support the KSA vision 2030 and NTP.
- Develop a well-articulated strategy within the context of UBT.



Session (3): Understanding the key elements shaping UBT_VMC

UBT Vision, Mission and Core Values

These three elements involves answering three main questions:

- Where do we want to be? - **Our Vision**
- Why do we exist? – **Our Mission**
- What is driving us? - **Our Core Values**



UBT Vision, Mission and Core Values



Our Vision

To be a leading university nationally and recognised internationally in education and research for the advancement of society

Our Mission

The Mission of the University of Business and Technology is to contribute to society through the pursuit of high quality undergraduate and postgraduate education that prepares competent professionals and future leaders, and a reserach with tangible impact on the curriculum, the economy and the community.

Our Core Values

- **Passionate**
- **Responsible**
- **Excellence**
- **Diversity**
- **Integrity**
- **Creative**
- **Team Spirit**

UBT's Core Values



Passionate - Being positive, enthusiastic, taking pride of what we do, with the spirit of nothing is impossible.

Responsible - Serving as a catalyst for positive change and advancement of society.

Excellence - Pursuing and sustaining the highest quality standards in all that we do through continuous lifelong learning.

Diversity - Dealing fairly, respectfully and encouraging cultural diversity through inclusion of various perspectives, traditions and experiences.

Integrity - Acting with dignity and honesty while adhering consistently to the university ethical and professional codes, which are aligned with Islamic values.

Creative - Finding new ways to do things; being creative, flexible, and a change agent for the betterment of society.

Team spirit - Fostering a team-working environment that encourages the willingness to cooperate as part of a team. Stronger together.

***In all that we do, we strive for being Passionate, Responsible, pursue Excellence, embrace Diversity, Integrity, and Creativity through Team spirit.
Our values PREDICT our Future.***

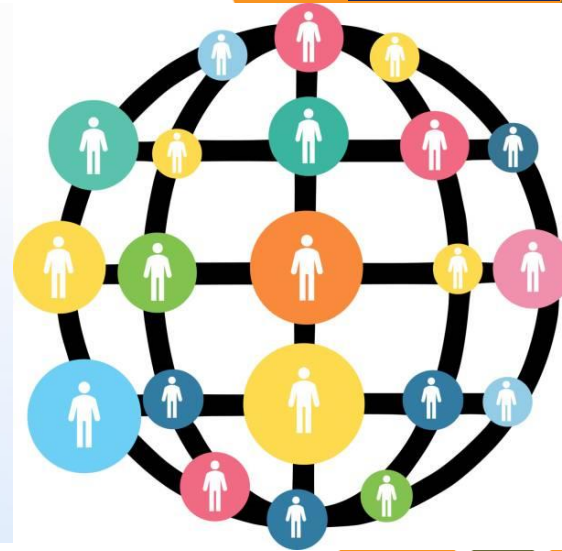
Key elements shaping UBT V.M.C.

Group Activity (1)



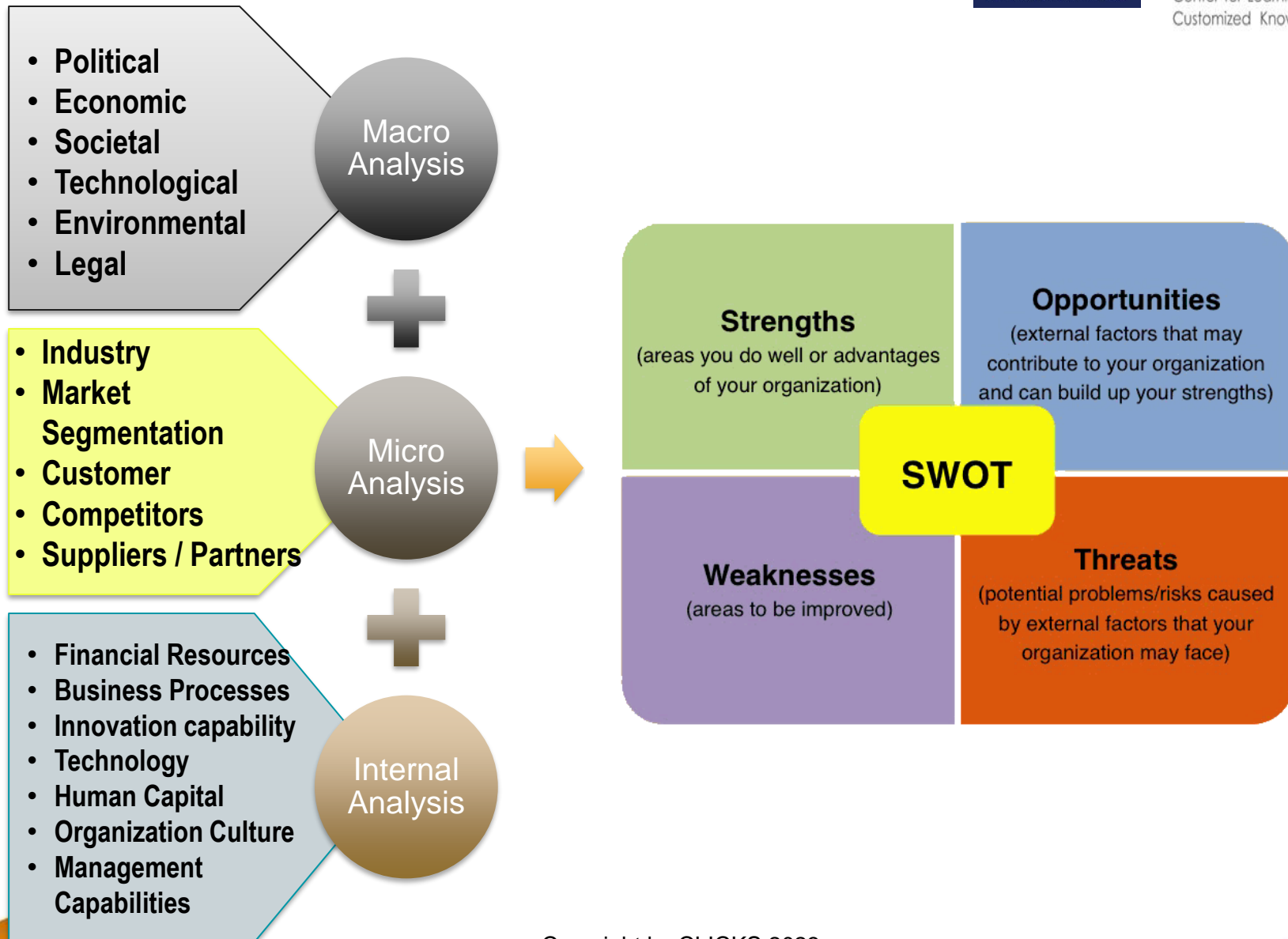
Participants
Workbook





If you don't know yourself and your environment, you cannot adapt, and if you cannot adapt, you won't be able to endure.

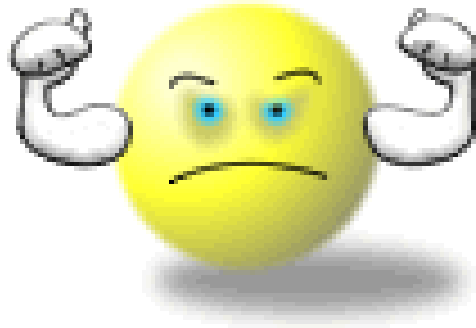
Overview Approach



SWOT Elements

Internal

Strength

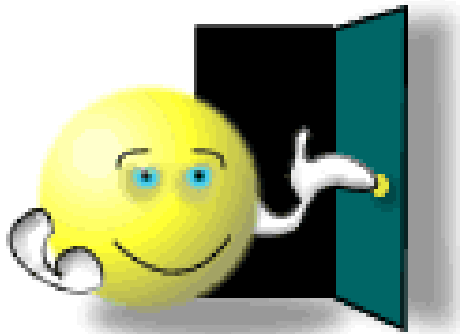


Weaknesses



External

Opportunity



Threat



Originated by Albert S Humphrey in the 1960s

SWOT Analysis

The purpose of SWOT analysis is to isolate key internal and external issues and to facilitate a strategic approach. Your SWOT feedback represents a set of issues covering the university's current business conditions.

The purpose of the this exercise is to find answers to the following important questions:

How can we use our strengths to enable the university to take advantage of the opportunities identified?

How can we use these strengths to overcome the threats identified?

What do we need to do to overcome the identified our weaknesses in order to take advantage of the opportunities?

How will we minimise the university weaknesses to overcome the identified threats?

SWOT Analysis

Group Activity (2)



Participant Workbook

Conducting Stakeholder Analysis

A stakeholder is a person, group or organisation that has a direct or indirect stake or interest in the organisation because it can either affect the organisation or be affected by it.



Considering the fact that stakeholders have either influence or interest in the performance of the university, it is key that any institution has clearly identified the different stakeholder groups, understands their level of influence and takes their opinions, priorities and concerns into account when developing and reviewing strategy and supporting policies.

University Constituents

Source: Brent D. Ruben, Toward a Balanced fir Higher Education, Higher Education Forum, Rutgers University, 1999.



Prospective Students: Applying to a university program as a preferred choice, informed about the qualities and benefits they can realize through attending

Current Students: Attending their university /program of choice with well-defined expectations and high-level of satisfaction relative to all facets of their experience.

Research contract agencies and other organizations and individuals: Seeking new knowledge and solutions to problems

Families: Proud to have a family member attending the university/program, supportive of the institution, recommending it to friends and acquaintances.

Alumni: Actively supporting the university / program and its initiatives

- **Employers:** Seeking out university/ program graduates as employees; promoting the university/ program among their employees for continuing education.
- **Colleagues at other institutions:** Viewing the university as a source of intellectual and professional leadership and desirable workplace
- **Governing board:** Supporting of the institution and enthusiastic about the opportunity to contribute personally and professionally to its advancement.
- **Local Community:** Viewing the institution as an asset to the community; actively supporting its development
- **Faculty:** Please to serve on the faculty of a leading well-supported institution, enjoying respect locally, nationally and internationally
- **Staff:** Regarding the institution as a preferred workplace where innovation, continuous improvement and teamwork are valued

Stakeholder Analysis Matrix

Stakeholders Influence – Importance Matrix Interpretation

High	Importance (<i>Interest</i>)	<div>Keep Informed/Consult</div> <div>Require special initiatives if their interests are to be protected</div>	<div>Manage Closely/Partner</div> <div>Need good working relationships to ensure an effective coalition of support for the strategic planning initiatives</div>
		<div>Inform/Monitor</div> <div>Require limited monitoring or evaluation. They are unlikely to be the subject of project activities or management.</div>	<div>Keep Satisfied/Control</div> <div>Need careful monitoring and management</div>
Low		Low	High
		Influence (<i>Power</i>)	

Stakeholder Analysis Template

Stakeholder	Interest		Influence		Needs
	High	Low	High	Low	

Stakeholder Analysis (Review)

Group Activity (3)



Participants workbook

Stakeholder Influence-Interest Matrix (2019-2023)

Interest	High	<p><i>Keep Informed/Consult</i></p> <p>Government agencies; Industry; Employers; Wider Community; Professional bodies; Faculty members Administrative and operations staff; Partner Institutions</p>	<p><i>Manage Closely/Partner</i></p> <p>Students / Executive learners; Alumni; Governing Board; Owners/ Investors; Top Management;</p>
	Low	<p><i>Inform/Monitor</i></p> <p>Parents Secondary Schools Local & International Media</p>	<p><i>Keep Satisfied/Control</i></p> <p>Ministry of Education, NCAAA</p>
		Low	High
		Influence	



Session 5: UBT Strategic Plan Model

Strategic Themes & Strategic Enablers

Strategic Themes / Focus Areas reflect what the management team believes must be done to succeed. They are the high-level and broad business strategies.

A strategy

By definition a strategy is a “set of choices that collectively position the firm in its industry so as to create sustainable advantage relative to competition and deliver superior financial returns.”

“...the set of integrated choices that define how you achieve superior performance in the face of competition.... It is not a goal ... it is the position you choose that will result in achieving the goal; the actions are the path you take to realize the positioning”

Michael Porter

A strategy does not need to be detailed, but it needs to be explicit. And it needs to cover the following five elements:

What is our winning aspiration?

Where will we play?

How will we win?

What capabilities need to be in place?

What management systems must be instituted?

WHAT CHOICES NEED TO BE MADE TO MOVE UBT FORWARD?

Five Strategically Important Questions



- 1) What will our financial model look like?
- 2) Which student segment will we serve, where and what will we provide them?
- 3) How will value delivery system be designed to serve these students?
- 4) What institutional and individual competencies do we need to have to deliver these needs?
- 5) What portfolio of initiatives that we need prioritize over the next five years to execute our strategy?

What are strategic themes?

Strategic Themes reflect what the management team believes must be done to succeed. They are the high-level and broad business strategies

Strategic Themes reflects the executives' view of what must be done internally to achieve the strategic outcomes. One developed, the main question asked: "if we excel in these 3-4 areas, will we achieve our vision"

Strategic Themes are a set of "non-negotiables" that an institution must do in order to deliver its mission and realize its vision.

"Strategic themes are the building blocks (Pillars) around which the execution of strategy occurs"

Zook and James Allen (2012). "Repeatability: Build enduring businesses for a world of content change", Bain & Company

Robert Kaplan and David Norton (2004). "Strategy maps: Converting intangible assets into tangible outcomes", Harvard Business School Publishing Corp. P49.

Crafting your strategic themes

University strategic themes should be informed by the activities undertaken during the strategy development stage, which includes (but not limited to) the following:

Market
Research,
Context
Analysis and
Baselines
Assessment



SWOT Analysis



**Stakeholder
Analysis**



**Differentiation
strategy**
(What makes us different
from the rest?)

What are the few critically important themes that if implemented within the next 5 years, will significantly and tangibly transform the institution's current position, achieve its vision (close the value gap) and consistently deliver its value proposition?



Strategic Conversations

**4 Strategic Themes
5 Strategic Enablers**

UBT Strategic Plan Model



UBT Vision

"To be a leading university nationally and recognized internationally in education and research for the advancement of society"

UBT Mission

"The Mission of the University of Business and Technology is to contribute to society through the pursuit of high quality undergraduate and postgraduate education that prepares competent professionals and future leaders, and a research with tangible impact on the curriculum, the economy and the community"

Our Core Themes

Holistic Student experience

High quality market-driven programs

Research with tangible impact

Deep engagement with the wider community

Our Strategic Enablers

- ❖ Cultivate International links
- ❖ Ensuring institutional effectiveness
- ❖ Valuing our people
- ❖ Quality facilities and infrastructure
- ❖ Financial and resource sustainability

Our Core Values

- ❖ Passionate
- ❖ Responsible
- ❖ Excellence
- ❖ Diversity
- ❖ Integrity
- ❖ Creative
- ❖ Team Spirit

UBT Core Strategic Themes



Holistic Student Experience

Develop and deliver transformative learning experiences that nurture students holistically and prepare them for work and life.



High Quality Market-driven Programs

Develop and maintain high quality market-driven academic and executive programs that meet local and international standards, delivered by talented faculty who adapt innovative and engaging learning and teaching practices.



Research with Tangible Impact

Create a vibrant intellectual environment that stimulates innovative research in key focus areas with tangible impact on the curriculum, Industry and the Economy..



Deep Engagement with the Community

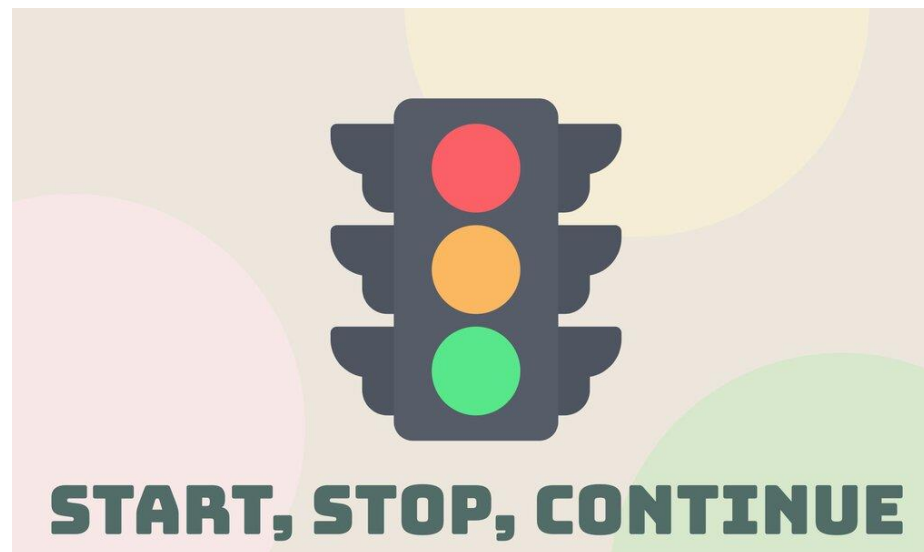
Develop strong and constructive relationships with the wider communities by contributing to the cultural, social and economic wellbeing of the local and international communities.

UBT Strategic Enablers



What is “Start-Stop-Continue” Method?

- The “**Start – Stop – Continue**” is a collaborative feedback mechanism to get everyone involved in strategic retreat to organize their thought into specifically determining what matters most to UBT to achieve its goals.
- The main objective of this exercise is to gather feedback from the UBT team and stakeholders on what to do with what was agreed in the current plan (themes, objectives, KPIs, targets and initiatives) and what needs to change moving forward.



What is “Start-Stop-Continue” Method?

Start

- What new objectives, KPIs, and targets to consider.
- *What should we start doing?* List initiatives or ideas that:
 - The department or university is not doing, but you think should be done.
 - New ideas that have or have not been considered before.
 - Ideas to address emerging trends, achieve important outcomes, or improve results.

Stop

- What objectives and KPIs, and targets that are not relevant/ non longer applicable.
- *What should we stop doing?* List initiatives or ideas that:
 - Are not working or achieving desired outcomes for the department or university.
 - No longer align with departmental or university mission or goals.
 - Are no longer effective or valued
 - No budget, no resources with unclear direction

Continue

- What objectives, KPIs, and targets that are still relevant.
- *What should we continue doing?* List initiatives or ideas that:
 - Are working well for the department or university. (on-track)
 - Are successful or effective.
 - Align well with mission and values of the department or university.
 - Slightly behind or moving in the right direction
 - Not started, but must keep (still valid)

Stop-Start-Continue Template

Areas	START	STOP	CONTINUE (Keep doing)
	What should we start doing? And why?	What should we stop doing? And why?	What should we continue doing? And why?
Objectives	<ul style="list-style-type: none"> New objectives 	<ul style="list-style-type: none"> Objectives not relevant 	<ul style="list-style-type: none"> Objectives we maintain (or revise slightly)
	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">
Key Performance Indicators	<ul style="list-style-type: none"> New KPIs 	<ul style="list-style-type: none"> KPIs not relevant 	<ul style="list-style-type: none"> KPIs we maintain (or revise slightly)
	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">
Targets	<ul style="list-style-type: none"> New KPIs 	<ul style="list-style-type: none"> KPIs not relevant 	<ul style="list-style-type: none"> KPIs we maintain (or revise slightly)
	<ul style="list-style-type: none"> 	<ul style="list-style-type: none"> 	<ul style="list-style-type: none">
Initiatives	<ul style="list-style-type: none"> Start doing 1 Start doing 2 Start doing 3 	<ul style="list-style-type: none"> Stop doing 1 Stop doing 2 Stop doing 3 	<ul style="list-style-type: none"> Continue doing 1 Continue doing 2 Continue doing 3
Person-In-Charge	<ul style="list-style-type: none"> New Person in Charge 	<ul style="list-style-type: none"> No longer in charge 	<ul style="list-style-type: none"> Maintain person in-charge

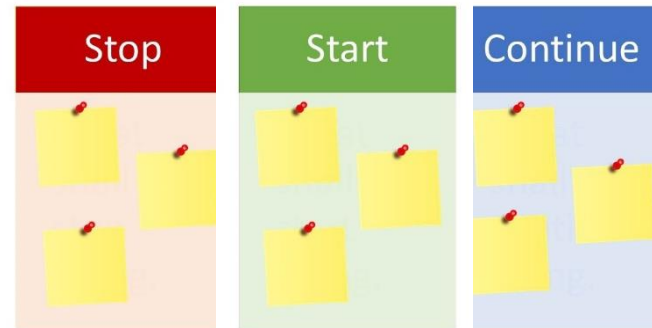


Session (6): Review UBT Goals, **Objectives and Initiatives**

**Themes & Enablers Group Discussions–
using “Start – Stop – Continue” tool**

SSC Method

Group Activity (4)



Each team:

- Go through the theme assigned to your team. Information about the theme in UBT Plan 2019-2023
- Divide the flipchart into three sections (Continue; Start; Stop) as shown in figure above
- As instructed in the Workbook, discuss with your team, identify the changes to the theme and write them down in a post-it-note, and place them on the flipchart.

Participants workbook

Support Material and Guidance

*Support material to
support your
review of the
strategic plan
components:
Strategic
objectives, KPI,
and Initiatives*

Developing UBT:

- (1) Strategic Objectives
- (2) Performance Measures
- (3) Strategic Initiatives

(1) Developing UBT Strategic Objectives



Criteria for selecting your strategic objective

Setting objectives demands a yardstick to measure the fulfillment of the objectives. If an objective lacks specificity or measurability, it is not very useful, simply because there is no way of determining whether it is helping the institution to move toward its mission and vision.

Criteria for selecting objectives: **S.M.A.R.T.A.**

- **Specific.** This provides a clear message as to what needs to be accomplished.
- **Measurable.** There must be at least one indicator (or yardstick) that measures progress against fulfilling the objective.
- **Appropriate.** It must be consistent with the vision and mission of the organization.
- **Realistic.** It must be an achievable target given the organization's capabilities and opportunities in the environment. In essence, it must be challenging but doable.
- **Timely.** There needs to be a time frame for accomplishing the objective.
- **Agreed upon.** An objective must be clear enough to be understood, agreed upon by the persons in charge of achieving it.

Adapted from Dess, Gregory G., G.T. Lumpkin and Marilyn L. Taylor (2005), "Strategic Management" 2 ed. New York: McGraw-Hill Irwin.

Writing a strategic objective statement



Example: A university has a focus area “Research scholarship”. Under the focus area the following objectives are crafted:

Focus areas: “Research Scholarship”
Strategic Objectives
<ul style="list-style-type: none">• Increase graduate student research• Produce leading research output with impact
<ul style="list-style-type: none">• Increase research funding
<ul style="list-style-type: none">• Improve faculty research productivity• Teaching informed and enriched by research
<ul style="list-style-type: none">• Improve faculty research competencies

Example of students' Objectives Examples

Focus areas: “Student experience”

Strategic Objectives

- Improve student retention (annual)
- Increase student enrolment
- Increase student participation in co-curricular programs and activities
- Increase student industry engagement through internship
- Increase student satisfaction with the learning experience
- Increase student employability (3-6 month after graduation)



Example of academic and operational objectives



Focus areas: “Academic excellence”

Strategic Objectives

- Achieve NCAAA accreditation of key academic programs
- Improve programs’ reputation through international accreditation and recognition
- Grow and diversify UBT’s portfolio of academic programs that is innovative and market-responsive
- Improve the quality of teaching and learning through the integration of innovative pedagogies and educational technology tools
- Significantly improve institution-wide services for the administration and support of research grants

Examples of Human capital objectives



Focus areas: “Human Capital”

Strategic Objectives

- Attract, grow and retain talented faculty and professional staff
- Improve Staff competencies
- Reduce staff turnover
- Reward and recognition of high performance and loyalty
- Develop leadership skills in a wider range of staff

Basic Terminology of Plan

(An Example of a business school)

Objectives:

What the school is trying to achieve



Measures:

How success or failure (performance) against objectives is monitored



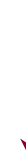
Targets:

The level of performance or rate of improvement needed



Initiatives:

Key action programs required to achieve targets



Objective	Measures	Targets	Initiatives
Increase student retention and graduation in the college of business	Percentage student retention by program annually	80% by 2020	<ul style="list-style-type: none"> Revise academic advising program (2019) Develop a program to enhance the first-year university experience (2019)
	Percentage student graduating within degree stipulated time	75% by 2020	

(2) Developing UBT Performance Measures



Key Performance Measures



Strategic performance measures monitor the implementation and effectiveness of an organization's strategies, determine the gap between actual and targeted performance and determine organization effectiveness and operational efficiency.

Good Performance Measures:

- Provide a way to see if our strategy is working
- Focus employees' attention on what matters most to success
- Allow measurement of accomplishments, not just of the work that is performed
- Provide a common language for communication
- Are explicitly defined in terms of owner, unit of measure, collection frequency, data quality, expected value (targets), and thresholds
- Are valid, to ensure measurement of the right things
- Are verifiable, to ensure data collection accuracy

Tracey Barr, Specialist in organizational performance measurement

Why use performance measurement



Assessing progress in the implementation of strategy (Performance measurement is used as a mechanism to monitor progress in critical areas such as student satisfaction, strategic initiatives portfolio and improvement in value-creating processes)



Challenging the strategic assumptions and validating the strategy (challenging and testing the strategic choices in line with the changes in student demographics, eLearning, changes in accreditation requirements, etc.)



Drive performance and accountability (Measures are required to ensure and communicate standards such as Student service charter, Accreditation standards, Financial compliance, Government regulatory requirements)

Adapted from: Bourne et al (2000), "Designing, implementing and updating performance measurement systems", International Journal of Operations & Production Management, Vol. 20 No. 7, pp. 754-771.

KPI Measures Definition Template



Measure:	
Purpose:	
Relates To:	
Formula:	
Target Level(s):	
Frequency:	
Source of data:	
Who measures:	
Who acts on the data (owner):	
What do they do:	
Notes/Comments:	

Measures may take several forms such as Absolute numbers, Indices, Percentages, Rankings, Ratings, Ratios. An institution should be diligent in selecting the right form to provide tangible progress on the strategic objectives.

Measures Definition Template _ Example

Measure:	1 st year Student Satisfaction Rating
Purpose:	The measures captures student satisfaction level with 1 st year learning experience
Relates To:	Objective: Improve first year student learning experience Initiative: Develop and implement rich and engaging pedagogical activities to actively engage student throughout their study.
Formula:	Number of semester-end survey respondents rating the students' learning experience 4 or 5 on a scale 1 to 5 divided by the total number of respondents. (expected response rate more than 80% of the total first year student for both general education and undergraduate studies))
Target Level(s):	80% (Actual Performance 70%)
Frequency:	At the end of each semester (preferably before grade announcement)
Source of data:	Data and reports are generated by Qualtrics survey management system. Student satisfaction report is available one week after the survey closure.
Who measures:	Effectiveness Office Executive collects the report generated by Qualtrics system
Who acts on the data (owner):	Director of General Education Program / Director of Undergraduate Program
What do they do:	Student satisfaction with learning experience rating will enable the program Directors to assess and compare the effectiveness of the improvements made in the delivery of teaching and the impact of the practical and engaging activities developed
Notes/Comments:	-

(3) Developing UBT Strategic Initiatives

TAKE ACTION!



What are strategic initiatives?

Extracts from: Kaplan, R., Norton, D. (2008), *The Execution Premium: Linking Strategy to Operations for Advantage*, Harvard Business Press

Strategic initiatives are action programs aimed at achieving targeted performance for the strategy map objectives.

Strategic initiatives represent the “*how*” of strategy.

Strategic initiatives are the collections of finite-duration discretionary projects and programs, outside the organization’s day-to-day operational activities, that are designed to help the organization achieve its targeted performance.

Initiatives cannot be looked at in isolation; they must be viewed as a portfolio of complementary actions, each of which must be successfully implemented if the institution is to achieve its theme targets and overall strategy target.



Developing your strategic initiatives

Stage	Strategic Initiative task	Issues
Identify	Create a list of all organizational initiatives	A simple exercise in identifying existing initiative is a crucial first step in prioritization. Most organizations have far too many initiatives.
Align	Establish criteria for aligning initiatives with the strategic objectives.	Use a weighting, or other explicit scoring system, for comparing the value of initiatives and establishing the business case.
	Prioritize strategic initiatives in line with strategic objectives	A robust system is required to ensure that the most valuable initiatives are launched and funded first
	Abandon non-strategic initiatives	Deal with the political fallout from senior management commitment to abandon initiatives.
	Rationalize, where appropriate, overlapping initiatives within the organization.	Create unitary teams where staff are working in parallel on the same projects.
Manage	Assign responsibility for initiative execution.	Senior executives must be made accountable for delivering strategic initiatives.
	Assign budget and other resources for each initiative (as required)	A separate budget should be allocated for each initiative which forms what Kaplan and Norton calls "STRATEX" or strategic budget.
	Monitor progress and measure impact.	Progress must be monitored and close attention be paid to ensuring the initiatives are impacting the targets/objectives.

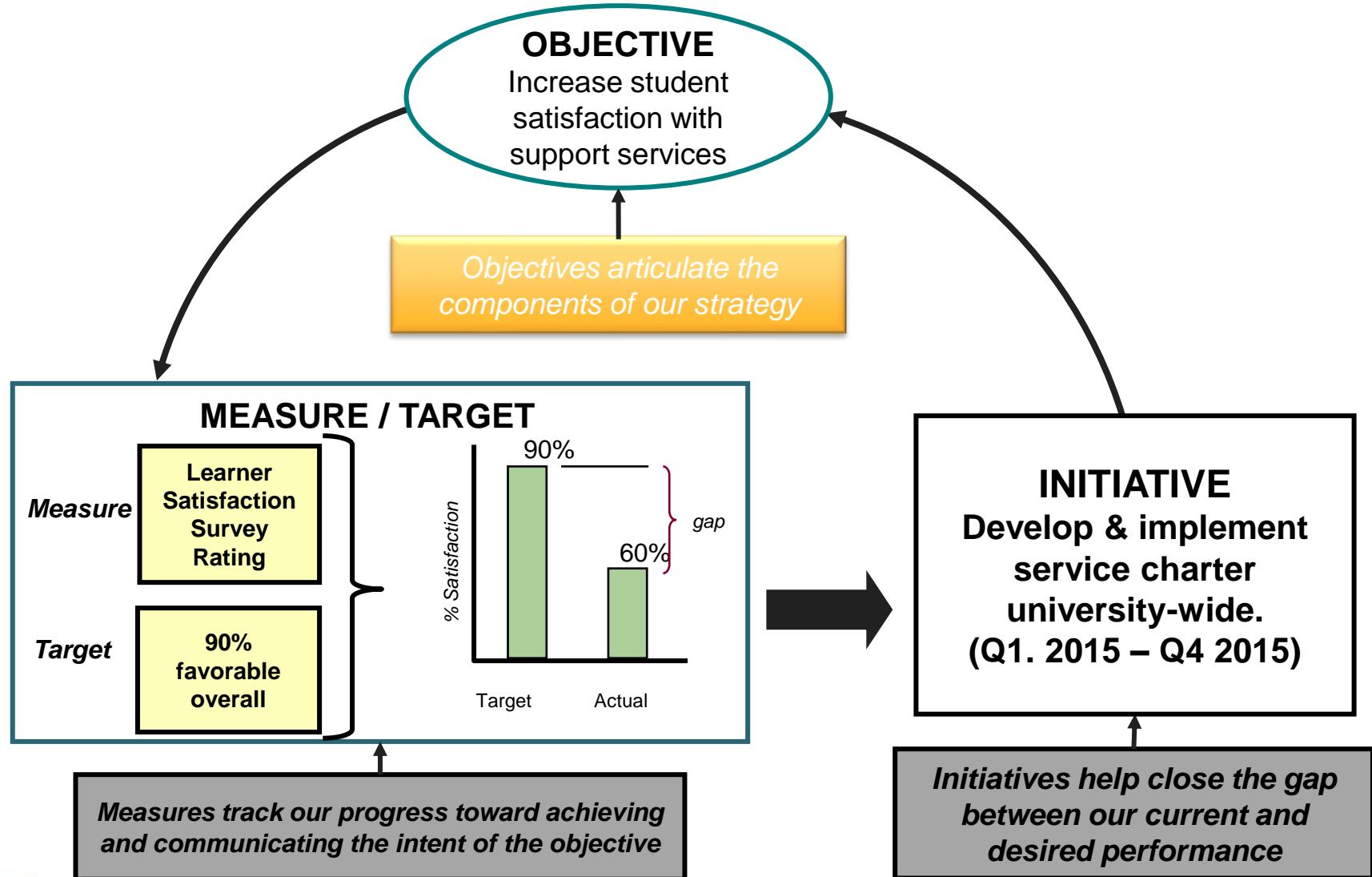
Criteria for selecting strategic initiatives

Initiative scoring at the Canadian Blood Services

- **Strategic fit** (1. low, 5. medium, 9. high)
- **Value Added** (1. low to modest Impact, 5. Significant results, 9. Breakthrough results)
- **Time to implement** (1. >24 Months, 3. 18-24 months, 5. 12-18 months, 7. 6-12 months, 9. less than 6 months)
- **Total costs** (1. more than 2,500, 3. 1000-2500, 5. 500-1000, 7. 250-500, 9. less than 250)
- **Project team capability** (1. insufficient internally, difficult to source externally, 5. insufficient internally, external resources available, 9. Sufficient internal staff and resources)
- **Project Risks** (1. High, 5. Medium, 9. Low)
- **Depth and dearth of change required** (1. High, 5. Modest, 9. Little)

Source: Kaplan, R., Norton, D. (2008), *"The Execution Premium: Linking Strategy to Operations for Competitive Advantage"*, Harvard Business Press

Linking objective, measure, target and initiative



Mapping Initiatives with strategic Objectives

Themes/ Focus Area Strategic Initiatives	I				II				III			
	Obj 1	Obj 2	Obj 3	Obj 4	Obj 1	Obj 2	Obj 3	Obj 4	Obj 1	Obj 2	Obj 3	Obj 4
Initiative (1)												
Initiative (2)												
Initiative (3)												
Initiative (4)												
Initiative (5)												

The Table helps :

- in ensuring that only relevant initiatives are selected which should address / affect more than one objective in the plan
- the management team in effectively managing the budget allocation. The initiatives selected which cross more than one perspective are financially viable .

Example of a Plan:



Focus area/Theme : Inspire Our Students to Develop Their Full Potential

Objective	Measure	Target	Initiative
1. Deliver excellent and inspirational learning and teaching.	• Student satisfaction	• Top quartile of higher education sector	“Students Really Matter” • Student satisfaction survey
2. Translate excellence in research and scholarship into learning opportunities for students.	• Student/staff ratio	• Reduce to 15:1	• Learning and teaching process improvement program
3. Provide an exceptional student experience.	• Level of demand for courses • Average A-level score of recruited students	• Increase to 8 applications per place • Increase to 420	• Student partnership agreements • Peer mentoring scheme
4. Increase participation of those who can benefit.	• Proportion of full-time undergraduate cohort from lower socioeconomic groups	• Increase to 24%	• Student portal

Source: Robert S. Kaplan and David P. Norton (2008), “Execution Premium: Linking Strategy to Operations for Competitive Advantage”, Harvard Business Review Press p113.

Example of a University's measurable objectives

Student and community focus			
Objective	Measure	Target	Owner
1. Produce globally marketable and outstanding graduates	• Percentage of graduated employed locally within 6 month of graduation (annually)	85%	SSX
	• Percentage of graduates employed by MNC within 12 months of graduation (annually)	10%	SSX
2. Generate opportunities for lifelong learning	• Number of new executive programs developed (annually)	3	CLLY
	• Number of students enrolled in executive programs (annually)	150	CLLS
3. Achieve reputable international ranking	• THES ranking	Top 350 in THES	PRXD
4. Student-centric learning environment	• Student satisfaction index (annually)	70%	SSX
5. Outstanding contribution to society	• Number of community projects (annually)	4	CSD
Academic and research focus			
1. Continuous academic program quality improvement	• Percentage of programs accredited locally by CAA and other international bodies AACSB (Bus), NAAB (Arch), WFME (Medical)	100% (CAA) 10% (Int)	QXTA
2. Reputable scholarly publication and citation	• Number of publications in citation indexed referred journals	200 (Published) 500 (Accepted)	RESS
3. Outstanding leadership and contribution to research	• Percentage of research experience staff	30% (>20 years) 50% (10-20 years) 20% (<10 years)	RESS
4. Strong national and international linkages	• Number of active local and international MoU and MoA	8	IPXX
5. Excellent student services	• Percentage of students services improved	60%	SSX



Section (7): Putting the Plan together

UBT Strategic Plan template



Strategic Theme/Enabler #X: [-----]

(a) Strategic Objectives and Key Performance Indicators

Objective	Key Performance Indicator	Baseline 2023	Target					Owner
			2024	2025	2026	2027	2028	
1.								
2.								
3.								

(b) Strategic Objectives and Initiatives

Objective	Initiative (Strategic Projects)	Milestones					Owner
		2024	2025	2026	2027	2028	
1.							
2.							
3.							



Session (8): **Aligning UBT Strategic Projects with UBT's Objectives & Key Results**

What are OKRs?

OKRs divide goals into achievements and the actions that support them. They are structured around two fundamental questions:

- **Objective:** *Where do I want to go?*

The Objective is the goal of the entire organization, team, or individual. Objectives are typically qualitative and set the direction for what every level of the business wants to achieve in a certain amount of time.

- **Key Result:** *How will I get there?*

Key Results (KRs) are the **measurable** outcomes that need to be achieved in order to meet the objective — somewhat like a “to-do list” for accomplishing an overall goal. KRs help **track progress** and are generally metrics-driven, using the team’s key performance indicators.

What did OKR originate?

- OKRs have a rich legacy, starting in silicon valley tech companies.
- The concept of objectives and key results was officially created by Andy Grove at Intel in the 70s, but his work was heavily influenced by the writings of Peter Drucker and his concept of Management by Objectives (MBO).
- **John Doerr** was at Intel at the time, and later took those ideas to Google.
- Larry Page publicly credits OKRs with Google's early success.
- From there, the concept spread all over tech startup culture to Amazon, LinkedIn, and more.
- More recently in 2017, Doerr chronicled the growth of the OKR methodology in his seminal book on the subject, *Measure What Matters*.

Brief history

Evolution of OKRs



Source: upshotly

Benefit of OKR

- **Focus:** OKRs enable companies to concentrate on several priorities, typically no more than five per team or department.
- **Alignment:** OKRs offer clarity on how each goal aligns with the broader purpose of the strategy.
- **Commitment:** OKRs inspire dedication from the participating teams to complete tasks within an established period.
- **Tracking:** OKR metrics allow businesses to track progress with an objective and provide insight on whether or not they need to modify their approach.
- **Stretching:** OKRs often encourage teams to reach beyond set objectives and fully realize their potential to make a more significant difference

Case Example - OKR

- Our University strategy 2030 is subdivided into (4) Themes.
- Each theme is comprised of Objectives - **this is the "O" or "the what"**.

(a) Objective

- Keep in mind that objectives must be **aspirational, action oriented, inspiring and concrete**.
- Theme (1): High quality industry-based programs
- In this example will focus on the objective:
 "Develop a nationally known school of engineering distinguished by engaged learning and a strong foundation in the arts and sciences."

(b) Key Results

- If the objectives are defined in the strategy, the next step is to develop your key results (KR's). **KR's are "the how"** and must adhere to these (5) criteria: **specific, time bound, aggressive yet realistic, measurable and verifiable and numerical – it's not a KR unless it has a number**.
- For this example we'll focus on building a capstone project program:
 Establish a Capstone Project Program by getting corporate or organizational sponsorship for (5) projects for the academic year 2021/2022 by end of the spring 2021 term.
- Note this satisfies the criteria to be a KR and if achieved, moves our university a step closer to the objective listed above.

Measurable Outcomes and Actions: **Note that KR 1 is not a task list.** It is a measurable outcome that will be supported by actions that may be recorded in a task list. For example, one simple action to deliver KR1 could be: **A1 - Contact (1) potential new partner per week.**

(Adapted from John Ring (2021))

Examples of OKR

Theme: **Enhancing Student Success**

Objective: Improve student success rates and academic achievements.

Key Results:

- Increase the graduation rate by 10% within the next three years.
- Reduce the dropout rate by 15% within the next academic year.
- Improve the average GPA by 0.5 points within the next semester.

Theme: **Expanding Digital Learning**

Opportunities

Objective: Expand access to digital learning resources and platforms.

Key Results:

- Increase the number of online courses offered by 20% by Q3 next year.
- Enhance the functionality and user experience of the learning management system by 70% within six months.
- Achieve a 30% increase in student enrollment in online programs within the 2nd long semester.

Theme: **Fostering Education for Sustainable Development**

Objective: Promote diversity, equity, and inclusivity in education.

Key Results:

- Increase the enrollment of underrepresented students by 15% within the next two years.
- Implement 10 SDG teaching practices and curriculum modifications within the next semester.
- Establish partnerships with 5 community organizations to support marginalized students within the next quarter

Theme: **Enhancing Student Success**

Objective: Enhance assessment methods to evaluate student learning effectively.

Key Results:

- Implement 10 formative assessment strategies in 100% of classrooms within the next academic year.
- Incorporate 5 technology-based assessment tools to provide immediate feedback within six months.
- Improve the alignment between assessments and curriculum standards by 80% within the next quarter

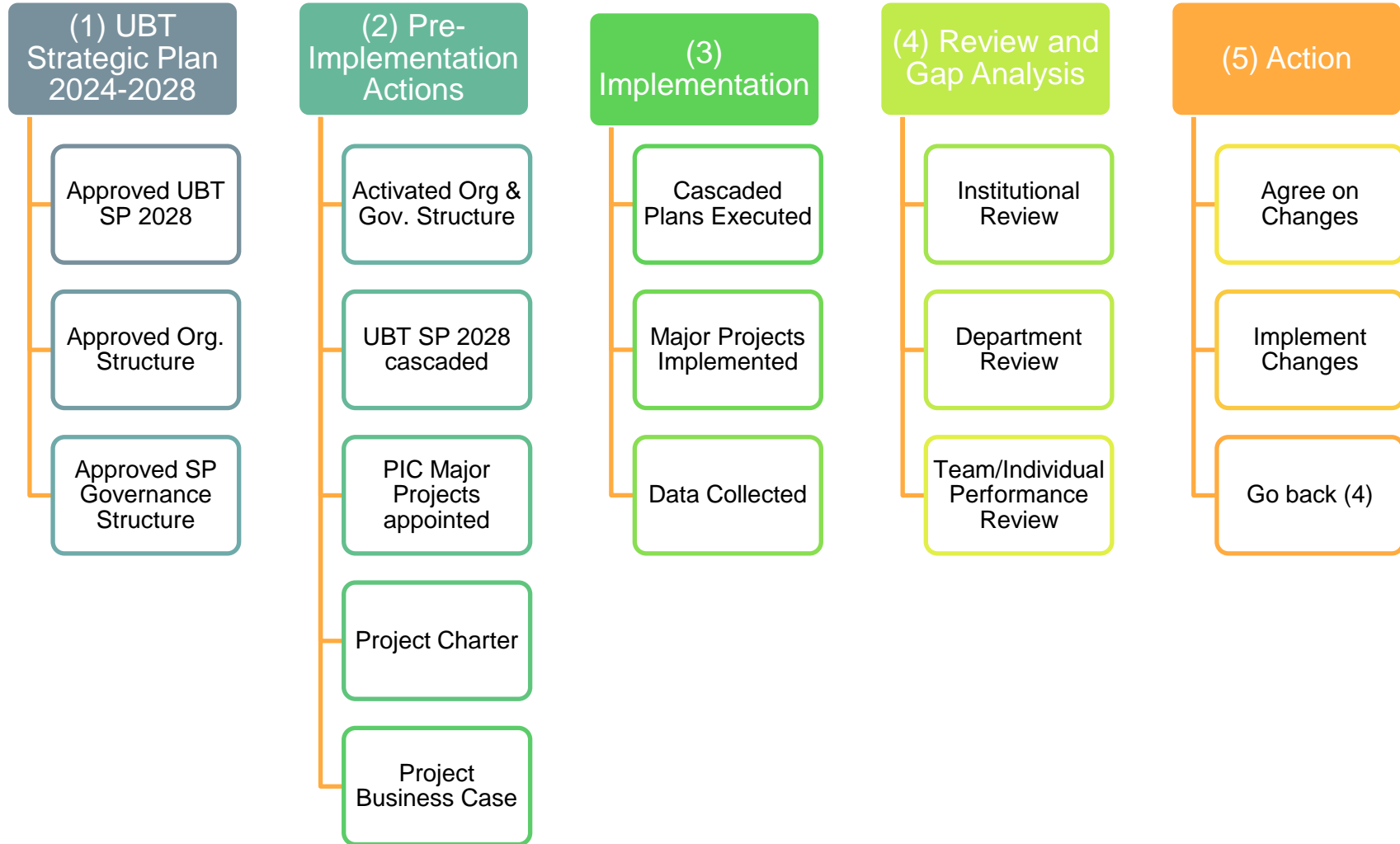


Session (9): UBT Strategic Planning implementation

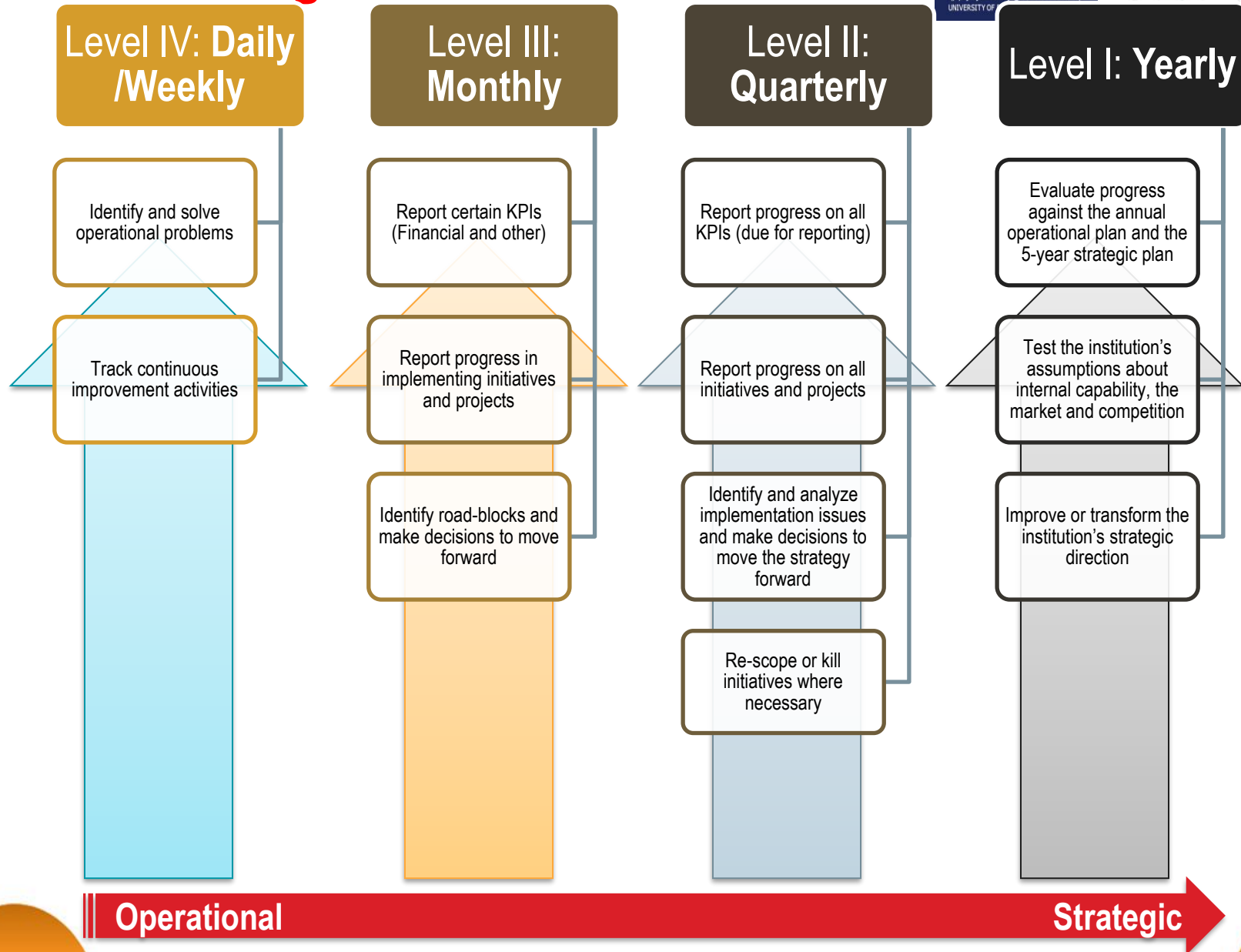
What Next?

1. Agree on and activate the role and responsibilities of key person-in-charge (PIC) in the strategic plan 2028.
2. Agree on and activate the committees responsible to oversee the implementation of the Strategic Plan 2028.
3. PIC to be strategic project sponsor and coordinator
4. Major project Team structure and TOR
5. Business case for the major project initiatives and actions.
6. Cascading UBT's Institutional Strategic Plan to the colleges and support departments

Next Steps – to activate UBT SP 2028



University Operational and Strategic Review Meetings



*Thank
you!*