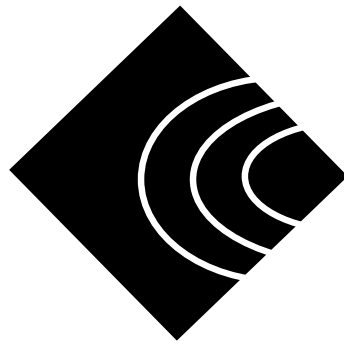


**Strategic Horizon Program**  
***Strategic Thinking Module***

**Facilitator's Manual**



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**Center for Community  
College Development**

# Strategic Horizon Program

# ***Strategic Thinking Module***

## ***Facilitator's Manual***

### ***Before the Session***

***[Facilitator: Prior to the training session for Strategic Thinking (ST) contact a representative of the college to determine the following:***

- ***the number and types of staff for whom training is desired***
- ***the objectives and desired outcomes of ST training***
- ***the order of training for different groups (a suggested sequence is senior administrators followed by supervisors, faculty and classified staff)***
- ***the size of the group(s) to be trained (the maximum number should not exceed 25)***
- ***the composition of the groups to be trained (mixed groups, homogenous groups, etc.)***
- ***seating arrangements for the training session(s)***
- ***institutional preference for case study work or identification of “unmet opportunities” in the closing segment of the training session***
- ***if the preference is for “unmet opportunities”, discuss with the college representative a process or procedure for handling the opportunities that are identified***
- ***the institution's preference for follow-up with staff after the training session***

***The packet for session participant should include: 1) a hard copy of the ST Powerpoint presentation, 2) copies of 2 newspaper articles (the hotel industry article and a recent national or local newspaper article), 3) worksheets for session exercises (case study worksheet or “unrealized opportunity” worksheets), and 4) the session evaluation form.***

# Facilitating the Session

## I. Introduction

### Slide #1 Strategic Thinking module

Before we begin, let's introduce ourselves—I'm \_\_\_\_\_ and this is \_\_\_\_\_ (if more than one person is conducting the session). . . (self-introductions continue) . . .

Welcome to a learning experience on Strategic Thinking—what you will soon come to call “ST.” Strategic Thinking will play an increasingly important role in the development of this college. It is all about the approach to thought that you and your fellow faculty and staff use in your work. A capacity to more intentionally use a “big picture approach” to thinking will enable you to know more about students and important stakeholders—what they think, what they want, what they expect, and more—and thereby to serve them better. For this reason, strategic thinking is **your** business. It is **everyone’s** business in this college.

Strategic Thinking is one of seven capabilities that colleges are committed to developing as part of the Strategic Horizon Program. The Program and the capabilities it is developing are described in the brochure that you received several days ago. In case you did not have a chance to read it, another copy is at your table. To refresh your memory the seven capabilities are:

Strategic Thinking	Process Management	Communication	Change Management	Constituency-Based Assessment	Culture Mapping/ Change	Developing Leaders
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[Facilitator: Pause to determine if the meeting participants are familiar with the Strategic Horizon Program]

## II. The Strategic Thinking Module

The Strategic Thinking Module is a 2-3 hour training program to develop *more intentional* strategic thinking skills. It will begin with a **definition of Strategic Thinking**, a description of what it is designed to accomplish, and the learning outcomes we want to achieve through this module. Next we will ask you to look over a **newspaper article** and identify key themes. Then, we will **examine key questions that are part of a protocol** for strategic thinking. Finally, we will close the first part of the session by **revisiting the newspaper article** and reinterpreting it using the protocol of Strategic Thinking. After a short break, we will ask you to work through an assignment in which you **identify and describe an unmet or unrealized opportunity**, either within the college, your own department, or in your personal work. You will be asked to think through this opportunity using the protocol of strategic thinking. To carry out this assignment, you will complete a page describing: 1) the nature of the opportunity, 2) how you used the components of ST to analyze the opportunity, and 3) a plan or course of action to pursue the opportunity.

[Facilitator: Pause at this point, ask if there are any questions, and answer them]

### **III. Definition of Strategic Thinking**

#### **Slide #2 Definition of ST**

*[Facilitator: Review the working definition of Strategic Thinking and elaborate on it using working examples from your experience.]*

#### **Slide #3 What ST Accomplishes**

*[Facilitator: Describe what can be accomplished by the individual through enhanced capability in ST. Use examples to illustrate the points you are making and ask participants to provide personal examples of how they think ST might help them.]*

### **IV. Purpose and Objectives of the ST Module**

For community colleges to excel in the knowledge economy, people in all parts of the institution—faculty, administrators and support staff—need to be *able to look at forces in the environment (trends, events, circumstances and information) and determine implications for the institution, their department or service unit, and their work*. In short, we all need to be able to think strategically about the college and our area in it. Fortunately, there is a protocol for strategic thinking (ST) that can enable all of us to use it more intentionally; that is, to more routinely and naturally use it in our work. This module is designed to introduce us to this protocol and help us better understand the important role that strategic thinking plays in enabling us, our departments, and ultimately the college, to identify and pursue opportunity through envisioning what we may ordinarily overlook. It is not possible to pursue an opportunity that we cannot see.

*[Facilitator: Provide a working example or use the example below:]*

For example, both nationally and in \_\_\_\_\_ (the state in which the college is located), statistics on the number of men and women attending both community colleges, and colleges and universities in general, have shifted dramatically over the past decade: In September, USA Today reported that 135 women now earn bachelor's degrees for every 100 men—a complete reversal of past statistics. And, this article is only the latest of several that have appeared in newspapers indicating a *reverse-gender gap* in higher education. Yet, colleges have not yet begun to fully respond to this change by providing mentoring systems and scholarships that specifically target men as an under-represented group in the way that we targeted women in past years.

Clearly, the value of strategic thinking is realized through people who use it to discover new or previously unrecognized opportunities. The more frequently and the more intentionally it is used, the greater the benefit to the college as we identify and pursue opportunities in all parts of the institution. At the personal level, we sometimes tend to think that only top-level administrators, perhaps only the President alone, need to use strategic thinking. But the truth is that we can all use ST to good effect in a number of ways:

- To enhance the effectiveness of a department or unit on our students and stakeholders by better anticipating their needs and expectations and by delivering better academic preparation and service
- To help shape the future of the college
- To achieve personal fulfillment by helping students reach important goals
- And, finally, the ST skills that we develop can be used not only inside the college, but in most aspects of daily life.

*[Facilitator: Provide three more examples showing how ST can be used: 1) at the institutional level, 2) at the department level, and 3) at the personal level applied to one's work. An illustration of how Tulsa Community College is doing this is provided below]*

For instance—at the **institutional** level, TCC has used demographic data showing that a significant percentage of Native Americans are located in West Tulsa compared to other sections of the city, to develop a program in Native American Studies on the West Campus.

At the **department** level, Business faculty at the Western Campus have created an honors program by planning an interdisciplinary sequence of courses that result in the creation of a virtual company. This company then allows honors students to practice strategic thinking as they plan and market their company. As a result, both the faculty and their students are developing Strategic Thinking skills at the **individual** level that can be used in community service and in their personal lives.

So, with this background and these examples in mind, here are the objectives we want to achieve today with Strategic Thinking. At the conclusion of this module we hope you will have an interest in and a desire to use the following skills:

### **Slides #4 and #5 Desired learning Outcomes**

*[Facilitator: Review the five learning outcomes that the module is designed to achieve as shown in Slides #4 and #5]*

- a heightened interest in acquiring and analyzing information and an increased awareness of trends conveyed in information and interactions with students, stakeholders, and college employees.
- an ability to identify “big picture” themes in information delivered through various media, including the Internet, television and radio, newspapers and magazines, published reports, marketing materials, institutional research and college data--virtually anything that is written. You should also be able to identify important themes from observation, experience, and information shared in casual conversation.
- *a capacity to gauge and determine the implications* (i.e. meaning, impact, or effect) of this information for your institution, department or service unit, and your work.
- *an ability to determine a course(s) of action* that can be taken to: a) mitigate the undesirable effects of a specific trend or circumstance identified in the media and other sources of information, b) encourage the development of a positive trend, and c) pursue a new opportunity that could potentially benefit the college, your department or service unit, and/or your work.
- *a capacity to apply strategic thinking comfortably* in all aspects of your work *and to engage others* in the protocol and help them develop strategic thinking skills and competencies that can be used in their work.

## **V. Newspaper Exercise**

*[Facilitator: Now, let's have a little fun with ST:]*

### **Slide #6 Newspaper Exercise**



## **Hotels hope visitors check out livelier, upgraded lobby**

By Roger Yu, USA TODAY

February 13, 2006

### **Hotel lobbies aren't just places to check in anymore.**

Flush with money from the travel boom, the U.S. hotel industry will spend \$5 billion on improvements in 2006, says consultant PricewaterhouseCoopers. Hotels are channeling much of it into lobbies, making them inviting places to meet, linger and mingle.

They're betting that spiffier, livelier lobbies will give a competitive edge. And by drawing guests out of their rooms, hotels hope to generate more food and beverage sales:

- Marriott.** Its new lobby plan calls for a lounge with intimate tables and wait service. For guests who want to work but don't want to be cooped up in their rooms, the plan — partly inspired by Starbucks and airlines' airport clubs — lays out an area of alcoves. Marriott will start with newly constructed and renovated hotels, and eventually incorporate the model throughout the chain. "It's about public privacy," says executive Mike Jannini.
- Embassy Suites.** The Hilton-owned chain, known for open-air atriums, said last month it will start installing "a European-style" cafe in its hotels. To enlarge the usable space, it will eliminate the front desk and replace it with a set of self-check-in kiosks and podiums manned by staffers.
- Sheraton.** In partnership with Web portal Yahoo, Sheraton said in January that it will test a Wi-Fi-enabled communal lobby lounge at some of its hotels, including The Sheraton San Diego. It features desktop computers, a plasma TV, food and comfortable chairs.
- Boutiques.** The high-end Kimpton chain spent more than \$300,000 on lobby furniture when it opened Hotel Solamar San Diego last July.

Langham Hotel Boston, owned by Hong Kong-based Langham Hotels, will enlarge the lobby and move the bar and restaurant down from the second floor. The goal is to make the hotel, once home to the Federal Reserve Bank of Boston, more contemporary and lively, manager Serge Denis says.

W Hotels kicked off the lobby competition in the late 1990s with its first hotel, which is in New York. Its lobbies, known for buzzing parties, sleek décor and mood lighting, got inspiration from European hotels and cafes, says executive Ross Klein.

Anne Seymour, a Washington, D.C.-based crime victims' advocate, says she is finding it increasingly convenient to have meetings in hotel lobbies. Says Seymour: "They are larger, cleaner and (have) huge fluffy couches, free magazines and newspapers. Geez, who needs to even get a room anymore?"

We are distributing two newspaper articles, one focusing on the hotel industry and the other a recent article from a national or local newspaper. *Working individually*, you are asked to read both articles, identify the key theme(s) in each, and write them down.

1. Next, *work as a group*, selecting one person at your table to write down the consensus of the group in answering the following questions:
  - What is/are the key theme(s) in each article, as determined by the group?
  - Working individually, did most members of the group find the same theme or did they identify different themes?
  - What makes this theme stand out? Why is it significant?
3. Afterward, we'll share responses from each table.

**[Facilitator:**

- *Give the participants 15-20 minutes to review the articles*
- *Engage the participants in intensive discussion relative to these questions and record their answers for each article on newsprint.*

*Synthesize and summarize for the participants their overall reaction to the article-and confirm that your summary accurately represents their thoughts.]*

## **VI. Protocol for Strategic Thinking**

Using the newspaper articles as a frame of reference, let's look at the questions that need to be asked and answered when we are "thinking strategically" about community colleges. These questions are:

### **Slide #7 Strategic Thinking/ A Question-based Protocol**

***[Facilitator: Walk the participants through the ST questions and show how different conceptions of the information in the newspaper articles can be achieved by asking and answering the questions that are part of the protocol. Demonstrate the analysis leading to a different interpretation of the article on a question-by-question basis rather than waiting to the end of the protocol.]***

### **Slide # 8 A Question-based Protocol (cont.)**

1. **Define the enterprise**
  - What "*business*" is the institution in?
  - Is the business attractive?
2. **Identify the stakeholders**
  - Who are the key *stakeholders*?
  - What are their characteristics and needs?
  - What do they want—today? Tomorrow

**Slide # 9 A Question-based Protocol (cont.)**

3. **Identify the value created**
  - What *value* is the institution delivering to key stakeholders?
4. **Analyze the environment**
  - What *forces* are at work or emerging in the external environment?
  - Who are the competitors, what are they doing, and what are they apt to do?

**Slide #10 A Question-based Protocol (cont.)**

5. **Determine the source(s) of advantage**
  - Does the value created *differentiate* the institution from competitors?
  - What “*new form(s)*” of value can be created to achieve an advantage over competitors?
  - Is the advantage *sustainable*?

**Slide #11 A Question-based Protocol (cont.)**

6. **Assess Capabilities**
  - What are our institution’s *strengths and competencies*?
  - What are its *resources*?
  - What competencies and resources does it need to develop or acquire to build an *advantage*?

**Slide #12 A Question-based Protocol (cont.)**

7. **Assess Implications**
  - What are the implications of these responses:
    - For the *college*?
    - For your *department*?
    - For *you* in your work?

## **VII. Summarize**

*[Facilitator: Summarize the questions that need to be asked and answered in the Strategic Thinking protocol using Slide #13. As part of this summary, demonstrate the importance of strategic thinking by asking participants to: a) answer each question in the protocol for the hotel industry and also for community colleges and b) compare these answers to the themes they identified after reading the articles.]*

*[The facilitator will close this phase of the Workshop by asking the participants Slide #14 what they have learned about ST so far and what personal value it may have for them in their work.]*

## **Refreshment Break**



*[Facilitator: Following the break you will have a choice as to the design and length of the second and final phase of the session. Your options are:*

- 1) limit this phase to one activity by asking participants to identify and flesh out an “Unrealized Opportunity” using the ST protocol or*
- 2) engage the participants more deeply in ST by asking them to work with a case study (provided by the facilitator) using the ST protocol.*

*The choice of which option to use will depend on local institution preferences regarding desirable length of the session, the makeup and time constraints of the participant group, and desired outcome(s) of ST training.*

*If a choice is made to go with Option #1, the format will work as follows:*

## **VIII. Option # 1/ Identifying an Unrealized Opportunity**

***Facilitator:** Embedded in the newspaper articles were theme(s) involving conditions in the environment that, when fully understood and comprehended, could have a dramatic impact on this college, your department and, very likely, your work. While comprehending impact is important, just as important is the chance to identify and pursue an opportunity for your college, your department, or your work that has been missed or overlooked.*

So now, we want you to work at your table—individually or in a group of your choice—and use Strategic Thinking to identify an unmet opportunity in your **college, your department, or your work**. Please do the following:

*[Facilitator: Bring up **Slide #15** which describes the assignment related to Identifying an Opportunity]*

- Describe the opportunity in one paragraph, then
- Analyze the opportunity using the questions in the ST protocol, and
- Develop a course of action to pursue the opportunity

Please use the following pages to describe the opportunity and to chart your analysis of it using the ST protocol.

*[Facilitator: Bring up **Slides #16 and 17** which provide participants with a worksheet for Identifying an Opportunity]*

## ***Identifying an Unrealized Opportunity***

1. Describe the opportunity:

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2. Analyze the opportunity using questions in the ST protocol:  
*(please use a separate piece of paper)*

***Identify the stakeholders***

- Who are the key stakeholders?
- What are their characteristics and needs?
- What do they want—today? tomorrow?

***Define the value created***

- What value could be delivered to important stakeholders by pursuing this opportunity?

***Analyze the environment***

- What forces are at work or emerging in the environment that relate to this opportunity?
- Who are the competitors and what are they doing or what could they do?

**Slide #17**

***Identify sources of advantage***

- Will the value created through this opportunity differentiate our college, my department, or my work from that of competitors?
- Is the advantage obtained through differentiation sustainable?

***Assess capabilities***

- What capabilities are in place in the institution, in my department, and through my work to pursue this opportunity?
- What resources are available to pursue this opportunity?
- What capabilities and resources need to be developed or acquired to successfully pursue this opportunity?

***Assess implications***

- What are the implications of these responses for actions that need to be taken to pursue the opportunity:

*For the college?*

*For my department?*

*For my work?*

**3. Outline a plan of action you will use to pursue the opportunity**

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Your name: \_\_\_\_\_

Department: \_\_\_\_\_ Position \_\_\_\_\_

***If a choice is made to go with Option #2, the format will work as follows:***

## ***IX. Option #2/ Case Study***

***[Facilitator: Distribute the case study and distribute a hardcopy of page 13 in this manual posing strategic thinking questions. Then:***

- 1. ask the participants to use the ST questions on page 13 to analyze and solve the case study through small group discussion***
- 2. when the participants have finished, move around the tables and ask them to describe their analysis and response to the case study***

***There are choices available to you regarding what case study to use. The case study that follows has been developed and is being used by Tulsa Community College. It is provided here for illustrative purposes only. In the role of facilitator, you should plan to work with College officials to identify a case study that will be meaningful to the participants.]***

## **Case Study**

You have just been hired as part of the leadership team creating a new proprietary college that will operate in (your city or region). College of the Future plans to offer two-year associate degrees providing opportunities for transfer to senior level, bachelor's degree granting institutions; one-year certificates and two-year associate degrees in a variety of occupational program areas and to provide extensive, non-credit workforce development training serving the needs of the community.

College of the Future is part of an emerging national, for-profit organization that has been highly effective in a variety of markets historically served by community colleges that consider themselves to be vibrant, responsive organizations. In entering a new market such as (your city/ region), the college closely studies the operations of the local community college to look for opportunities allowing them to be more responsive to student needs than the existing institution. By following this model, they have been highly effective in recruiting students who may have ordinarily attended the community college, even though the expense of attending the proprietary college is substantially greater. The online website for College of the Future lists the following features:

### **Flexible**

Following a traditional academic calendar forces motivated adult learners to progress at a much slower pace than you desire. Achieving your educational goals is confined to being a distant dream. At our college, your educational goals become a quick reality. We recognize that your maturity and professional success will allow you to achieve your dreams at an accelerated rate. Classes are structured to enhance the learning of new material and at the same time build upon previous experience of the adult learner. Often adults are able to move through their course work and achieve their degree in half the time of a traditional program.

### **Collaborative**

You will become part of a small supportive team of adult learners who will stick with you throughout your program to help you meet your educational goals. Our faculty are facilitators, rather than lecturers, and they know that adults learn best in an interactive format with heavy emphasis on the practical application of their learning. In your class, you will gain from the rich experiences of other adult learners. This type of collaborative learning leads to graduation rates that are much higher than other schools.

**Faculty**

Here you will find experienced professionals whose academic qualifications and workplace experiences equip them to provide each adult learner with a stimulating learning environment. Your faculty's personal experience plus the students' varied work backgrounds create a rich learning environment. You will encounter course materials and class discussions where what you learn can be applied the next day. Your critical thinking and decision-making skills will also be enhanced as you apply course material to real-world examples.

**Financial aid**

The financial aid and accounting staff are ready to assist you. Online applications and the attentive support of the staff will aid you in obtaining a maximum award and meeting established deadlines. Course work meets U.S. Department of Education guidelines and, based upon your income level, you may be eligible for State and Federal grants. We also offer an interest-free deferred payment up to 30 days after the course is completed.

**Library services**

Using the power of the internet, the helpful staff of the Off-Campus Library Service bring a wealth of resources right to your finger tips. While many enjoy the experience of visiting the library and sorting through the volumes of books and resources that are available, we are able to make those resources available to the busy adult student from the convenience of your very own home. An extensive network of textbooks, journals, professional publications, databases, and electronic resources are available to you so your research needs are met in an efficient and timely manner. The experience of the staff assists you in finding and assessing information from the resources of the World Wide Web.

**Registration**

Prior to starting your degree work, you will receive a class calendar that shows you the dates for all of the courses in your core program. You don't have to worry that a course you need for your degree program won't be available when you need it because all of the courses in your program are mapped out for you in sequence. Waiting in long lines and registering for courses every semester are a thing of the past with our adult degree programs.

**Locations**

Our commitment to making college attendance for working adults convenient is a major reason why we have become one of the fastest growing universities in the nation. We have created an easy system where students do not have to leave their local community and travel hours to earn a college degree. This is why our college now has over 90 locations in Oklahoma, Kansas, Texas, Missouri, and Arkansas. With many locations and online programs, we bring the classroom to you!

**Textbooks**

As a busy adult, you don't have time to purchase textbooks at a bookstore. COF delivers textbooks and course materials directly to you. We take the hassle out of purchasing textbooks by delivering the books directly to you.

# Analyzing the Case Study Using the Strategic Thinking Protocol

*As a new member of the COF leadership team, think strategically about how you will develop COF in Tulsa by answering the questions below:*

## **1. Define the enterprise:**

- *What 'business' is College of the Future in?*
- Is the business attractive?

## **2. Identify the Stakeholders:**

- Who are the stakeholders of COF?
- What are their characteristics and needs?
- What do they want—today? tomorrow?

## **3. Identify the value created**

- What value will COF need to deliver to students to be successful?

## **4. Analyze the environment**

- What forces are at work or emerging in the external environment?
- Who are the competitors of COF? What are they doing and what are they apt to do?

## **5. Identify sources of advantage**

- Will the value created differentiate COF from competitors?
- What "new form(s)" of value can COF create to achieve an advantage over competitors?
- Is the advantage sustainable?

## **6. Assess capabilities**

- What are its resources?
- What competencies and resources does it need to develop as a source of excellence in higher education?

## **7. Assess Implications**

- What are the implications of the above responses for your department at COF?
- What are the implications for you as an individual working at COF?

# ***Closing the Session***

## ***X. Next Steps***

***[Facilitator: Bring up Slide # 18 on the screen]***

On each campus, we will need to lay a solid groundwork for ST to successfully develop as a regular college-wide practice. A good foundation may require three phases: **acclimating the leadership team**; **identifying the level and groups to train**; and **conducting the training**.

First, assess whether change will need to occur before your managers will be receptive to staff at lower levels when they begin to offer strategic ideas and suggestions. Next, identify areas of the organization that you intend to train and plan a cascade approach in which the first group trained, in turn, facilitates the training of the next group, and so on, until all target groups have been trained. Also, decide whether to train groups that are homogenous (comprised only of department heads or classified staff or faculty) or groups that represent a variety of organizational levels and positions. Then the actual training can begin!

Once multiple groups have been trained, we can use ST regularly in a variety of ways. As an example, Tulsa Community College recently developed a core values statement and revised its mission statement. Now it plans to use the ST process to revise its strategic vision statement. Your college might want to use the ST process to set departmental goals or to engage a segment of the college—such as classified staff or academic support staff—in ST for the first time, to change the organizational culture. There are many possibilities to be discovered, once we begin to use ST to recognize unrealized opportunities.

***[Facilitator: Thank the participants for coming, pass out the evaluation sheet, and ask them to complete it.]***

## Selected Readings

- Alfred, R. (2001). Strategic Thinking: The Untapped Resource for Leaders. *Community College Journal*. 71(3), 24-28.
- Cramer, J. (2002, February 1). Are You Thinking Strategically? *Issues*.  
[http://www.di.net/article.php?article\\_id=62](http://www.di.net/article.php?article_id=62)
- Linkow, P. (1999). What Gifted Strategic Thinkers Do. *Training and Development*. 53(7), 34-37.
- Porter, M. (1987, May 23). The State of Strategic Thinking. *The Economist*, 303(7499). 17-20.
- Wilson, I. (1995). Envisioning (and Inventing) the Future. *On the Horizon*, 3(3), 1-5.
- Wilson, I. (1996). The Practical Power of Vision. *On the Horizon*. 4(2), 1-5.
- Wilson, W. (1997). Focusing Our organizations on the Future: Turning Intelligence into Action. *On the Horizon*. 5(3), 1-6.

## Selected Websites

<http://www.des.calstate.edu/strategic.html>

[http://www.psc-cfp.gc.ca/research/knowledge/strathink\\_e.htm#Liedtka](http://www.psc-cfp.gc.ca/research/knowledge/strathink_e.htm#Liedtka)

<http://www.refresh.com/mindset.html>

<http://www.qm2.org/mbriefs/brief30216st.html>



# Evaluation

*As we wrap up the session on Strategic Thinking, we would appreciate feedback that will help us improve the module. Please take a few minutes to answer the questions below and simply leave it for us. Thank you!*

**What worked well?**

**What didn't work well?**

**What could be deleted?**

**What needs to be added?**

**Are you likely to use Strategic Thinking as a result of what you learned in this session?**

**On a scale of 1-10, how would you rate this workshop?**

<b>1</b>	<b>5</b>	<b>10</b>
<b>Poor</b>	<b>OK</b>	<b>Outstanding</b>