A Strategic Planning Process Model for Distance Education

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Abstract

As more institutions seek to implement or expand distance learning programs, it becomes critical to integrate distance learning programs into broader strategic visions and plans. Using the informed opinion from a panel of peer-nominated experts via iterative Delphi questionnaires, a 10-phased strategic planning process model for distance education was developed. This model is designed to support planners, from novice through expert, strategically prepare for implementing distance learning programs.

"To have a strategy is to put your own intelligence, foresight, and will in charge instead of outside forces or disordered concerns"
(Keller, 1983, p. 75).

Introduction

Strategic planning, in general, is a critical process in the success, and often survival, of higher education institutions today. It is perhaps even more critical when looking at the implementation or expansion of distance learning programs. Allen and Seaman report that a growing number of institutions are looking at distance learning as a means to increase student access, attract students from outside traditional service areas, and to expand continuing or professional education initiatives (2007). They cite that only 18% of degree-granting institutions reported that they had no interest in pursuing distance learning programs as part of their strategic vision; and another 5% are not yet engaged in distance learning programs, but see them as part of their strategic future; which leaves 77% of these institutions with some level of engagement in distance learning (Allen & Seaman, 2007).

We know that distance learning expanded dramatically in the 1990s and has continued this growth in the new century. From 2002 to 2006 online enrollments increased from 9.7 to 19.8 percent of total enrollments nationwide and this growth is projected to continue its increase at least through 2012 (Allen & Seaman, 2007; Gallagher, 2002). Such continued expansion implies a progressively more competitive market, which begs the question of how higher education institutions will prepare to meet the demand and face increased competition.

Strategic planning would appear to be a significant part of the solution for this challenge. The literature indicates that the vast majority of higher education institutions have a strategic plan and that distance learning programs will be more successful if there is a systematic strategic planning process (Fain, 2007; Stone et al., 2001; Kemp, 2000; Frances, Pumerantz, & Caplan, 1999). However, the same literature tells us that strategic planning, particularly in higher education, does not tend to be done well and what is often called strategic planning is actually focused at lower-level issues (Watkins, 2004; Buchanan, 2000; Kaufman, 1992). Meredith, Cope, and Lenning support this concern with a 1985 survey that found that while 87% of higher education institutions reported that they conducted strategic planning, the definition used by these institutions tended to be too broad. The result was that any planning performed was assigned somewhere within a vague definition of strategic planning. On further study they determined that only around one in three institutions actually performed bona fide strategic planning (1987). While there are no comparative statistics, it can be argued that the U.S. Department of Defense (DoD) does more strategic planning than any higher education institution. However, unlike the tenured staffs of academe, the typical military planner is only in that job for two to three years before moving on to another assignment. Dwight Eisenhower articulated the reason this approach works for DoD when he said, "plans are nothing, planning is everything" (Aaker, 1992, p. 3). It is the planning *process* that DOD emphasizes and educates its leaders in. This same approach can be applied to higher education through a strategic planning process model. Such a model is critical in enabling the leadership and management of higher education institutions to develop and implement strategic plans to successfully face an uncertain future.

Planning Continuum

Strategic planning is part of a multilevel continuum of planning processes defined by the scope and duration of the

planning. There are three distinct levels of interrelated planning—strategic, operational, and tactical—with strategic being the highest level of the planning trilogy (Kaufman, 2005). While ultimately, all three levels will be involved in the successful implementation of a distance learning program, the focus of this paper will be limited to the strategic level of planning.

Defining where one level stops and the other begins is generally a function of time and focus. Cope writes that "strategy evolves through a series of today's decisions as they take identifiable patterns over time" (1986, p. 7). The length of time is a defining characteristic for planning. At the high end of the continuum, strategic planning projects forward as little as 3 to 5 years (Barry, 1998) or as much as 10 to 20 years (Herman, 1990; Hunt, et al., 1997; Rumble, 1986). Operational plans encompass from 1 to 5 years. At the other end of the spectrum, tactical plans have the shortest outlook of typically less than a year (Barry, 1998; Herman, 1990; Rumble, 1986). The importance of comprehending this trifurcation of planning is that misunderstanding and misapplication are often causal factors in the perceived failure of strategic planning.

Strategic planning, with its long-range perspective, enables the institution to identify where it is going and focuses on broad policy issues (Moscow, 1981). An institution plans strategically to identify how it will commit resources over the long term in order to accomplish its mission (Hunt, et al., 1997). The strategic planning process enables it to communicate and motivate (both internally and externally), pursue opportunities, and employ systematic decision-making (Brickner, 1977).

Strategic Planning Process Model

Keller notes that "any organization with competitors, with aspirations of greatness, or with threats of decline has come to feel the need for a strategy, a plan to overcome" (1983, p. 75). This brief observation captures the core of the strategic planning: planning, at all levels, is a dynamic continuous process, operating in and impacted by an environment with both internal and external factors (Figure 1). Understanding and implementing this process is the key to success.

In 2001, research was conducted to define and model the strategic planning process of strategic planning for distance learning in higher education (Pisel, 2001). The research employed a panel of experts in the field to develop, refine, and validate the model. The product of the research was a 10-phase model with over 200 hyperlinked issues and questions that should be considered in developing and implementing a strategic plan for distance learning. The model is flexible and the lines between phases may become blurred as individual steps collapse together. The importance of each phase will also vary with the experience of the planner and the situation. The 10 phases of the model are listed below. A more-detailed depiction of the model is at Figure 2.

I. Planning Initiation
II. Planning Guidance and Scheduling
III. Analyses
IV. Mission Refinement
V. Assumptions
VI. Strategy Development and Courses of Action
VII. Functional Analyses
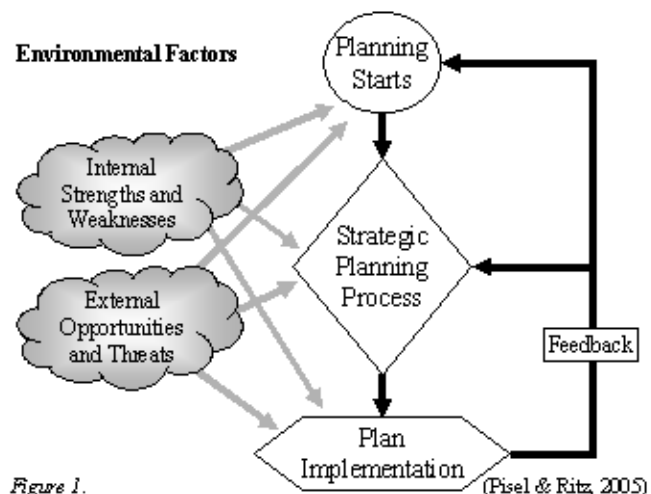VIII. Implementation
IX. Assessment
X. Periodic Review

Figure 1.

(Pisel & Ritz, 2005)

Strategic Planning Process Model

1a. Task Assignment
1b. Asset Identification
1c. Planning Organization

Planning Initiation — I

2a. Leadership Intent
2b. Planning Schedule

Planning Guidance/Schedule — II

III

3a. SWOTs analysis

Analyses

IV

Mission

4a. Vision Statement
4b. Mission Statement
4c. Organizational Values & Culture
4d. Objectives

3b. Needs/Gap analysis

V

5a. Logical
5b. Realistic
5c. Essential for planning to continue

Assumptions

6a. Integrate SWOTs analysis
6b. Develop tentative COAs
6c. Strategic Alignment
6d. Refine and expand tentative COAs

VI

Strategy Development/COAs

VII

Functional Analyses

7a. Functional Staff Analysis
7b. Review elements
- Adequacy
- Feasibility
- Acceptability
- Policy
- Variety
- Completeness
7c. Decision

8a. Allocate assets
8b. Detailed plans
8c. Timetable
8d. Assign tasks

VIII

Implementation

IX

9a. Formative Assessment
9b. Summative Assessment

Assessment

Feedback Loop

10a. Internal changes
10b. External changes
10c. Assumptions
10d. Mission and goals
10e. Implementation lessons
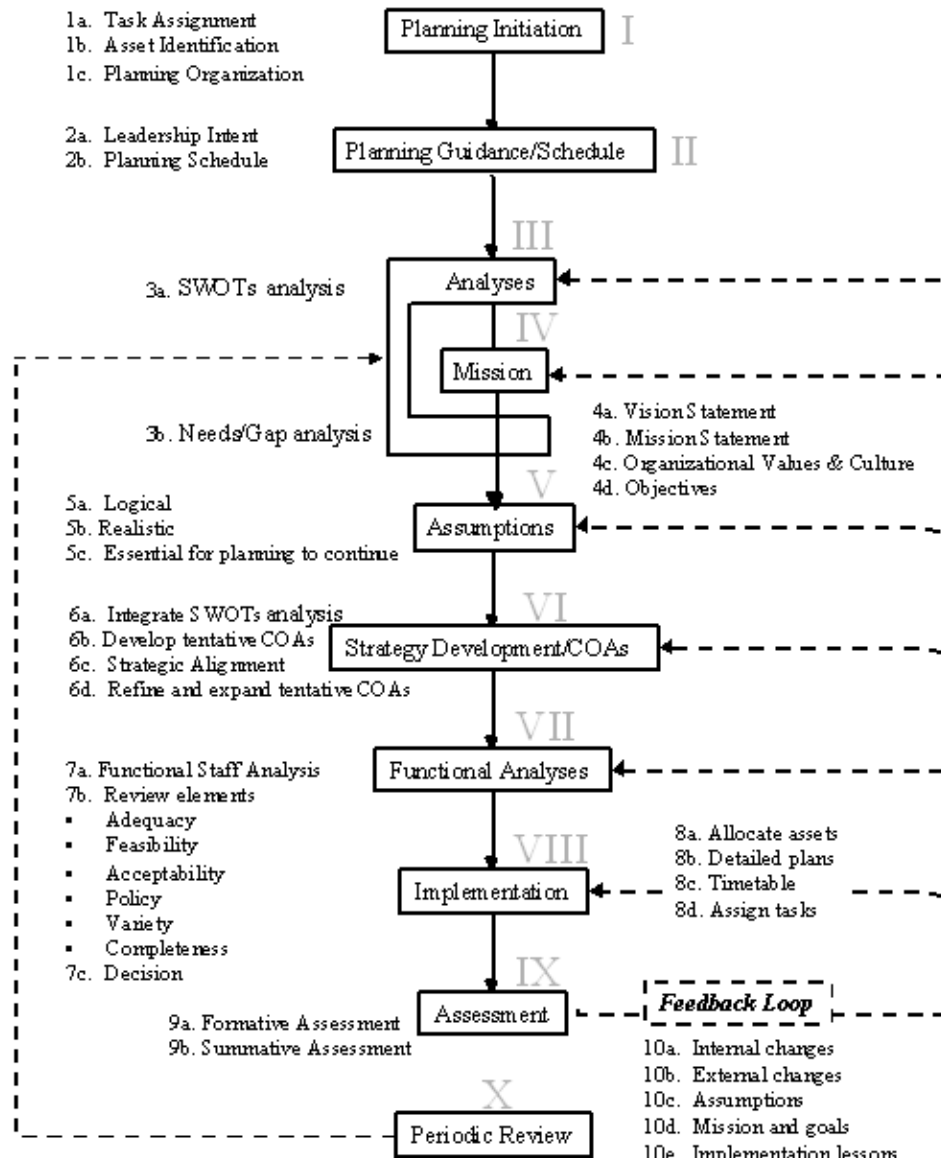
X

Periodic Review

Figure 2.

(Pisel, 2001)

Phase I – Planning Initiation

Three things occur in this phase that set the planning process in motion: a decision to start, identification of assets available for planning, and the assignment of a team to conduct the planning. The decision to start begins with an idea. This idea can be either internal or external to the institution. At a public institution it is very possible that the idea is driven from state legislature or other directive body and forces the institution to embark in planning. At a private institution, it may be an internal decision. Regardless of the source, an individual or group within the institution that has the authority to approve the plan, allocate resources, and create policies for implementation and accountability must assume the lead; otherwise, the process will be stillborn.

There are myriad assets that can be addressed in this phase. The primary assets of the higher education institution include faculty, support services, technology infrastructure and support, and funding, but planners must also consider intangible assets such as expertise and experience. When considering funding, the planners must know the types of budgets or fiscal allocations to be assigned. It is essential to understand whether there will be a fixed budget, one-time funding, or ongoing funding. Each approach to funding poses different challenges and opportunities.

Members of the team running this planning process must be identified and their roles defined. Getting people that represent a cross section of the organization involved in this process helps provide buy-in to the final product. Some level of authority commensurate with the tasking is delegated to the planning team and made clear to the rest of the organization. Limits of that authority must also be established. An ideal strategic planning body for distance learning consists of two parts. One part is a core element of 2-4 members who jointly design and lead the planning process and do all critical writing. A second group, with broad representation of the various functional areas, is called in at various key points in the process to participate. The size of the second group will vary, but is typically around 9-10 members. However, it should be as large as necessary to include all key stakeholders. Typical candidates come from a variety of functional areas internal and external to the organization.

Phase II – Planning Guidance and Scheduling

Two functions should occur in this phase: leadership intent is articulated and a planning schedule is established. Leadership intent is a guiding statement that clearly states the purpose of the planning effort. It gives the opportunity for all involved to understand the need for and overall goals of the planning effort. It is also a clear statement of ownership of the planning process by the organization's leadership. Such guidance should include the intended direction of the planning process and any predetermined constraints. If the planning task is externally driven, it is essential that there be a clear understanding of all guidance and stipulations that accompanied it. Since public institutions are more likely to be engaged in distance learning, the likelihood of external guidance may be greater, but both public and private institutions are subject to influence from policy groups, coalitions, and funding grants (Allen & Seaman, 2007 & Fain, 2007).

The planning schedule keeps the process moving forward at a defined pace. It establishes realistic parameters for the planning process based on leadership intent. Periodic milestones and/or phases can be used to reduce the process into more-manageable elements that give the ability to gauge the progress of planning. Not all milestones are of equal importance and the schedule should note where the objectives are rigidly set and where there is flexibility. Consideration should also be given to other calendars and schedules, such as the fiscal or academic year, which more often than not will drive target dates.

Phase III – Analyses

The Analyses phase contains two critical and distinct elements—the environmental analysis and the needs/gap analysis. These two individual analyses bracket the Mission phase that follows, effectively causing the two phases to run concurrently. Mintzberg describes strategy as a pattern that reflects the dynamics of the environment (1994). It is this phase that enables the planning process to assess the environment.

The environmental analysis precedes the Mission phase and gives it shape, aligning services and activities with changed and changing environmental conditions. At the core of the environmental scan is the SWOTs analysis (*SWOTs* is an acronym for **S**trengths, **W**eaknesses, **O**pportunities, and **T**hreats). This is a critical assessment of the seven areas of internal strengths and weaknesses of the institution and seven areas of opportunities and threats existing in the external environment (Figure 3). Today's dynamic market environment makes it essential to understand planning factors driven by the external environment and the institution's ability to muster an internal response.

Over 2,000 years ago Sun Tzu advised "know the enemy and know yourself; in a hundred battles you will never be in peril. When you are ignorant of the enemy but know yourself, your chances of winning or losing are equal. If ignorant of both your enemy and yourself, you are certain in every battle to be in peril" (Griffith, 1971, p. 84). While there is no pure *enemy*
in the context of planning for distance learning, there are competitors who create what Ansoff refers to as "a vector of potentially antagonistic objectives" (1988, p. 23). In a true strategic plan the university will know itself and its competition. (In addition to the factors addressed in the SWOTs section of this model, *Howell, Williams, and Lindsay (2003) and* Gallagher (2002) provide excellent ideas on factors to scan.)
The Needs/Gap analysis assesses the differential between the current status and the stated goals. An effective planning effort thoroughly identifies the goals the institution is seeking to achieve, its current capability to achieve those goals, and, most importantly, any gaps that exist between the two. This analysis defines the direction that the strategy must lead the institution to launch an effective distance learning initiative. Needs/Gap analysis follows the Mission phase of the model. This sequence allows it to be based on a comparison of the knowledge derived from the SWOTs analysis and the Mission phase of the model—a comparison of the environment and the organizational vision.

SWOTs Analysis

Figure 3.

(Pisel, 2001)
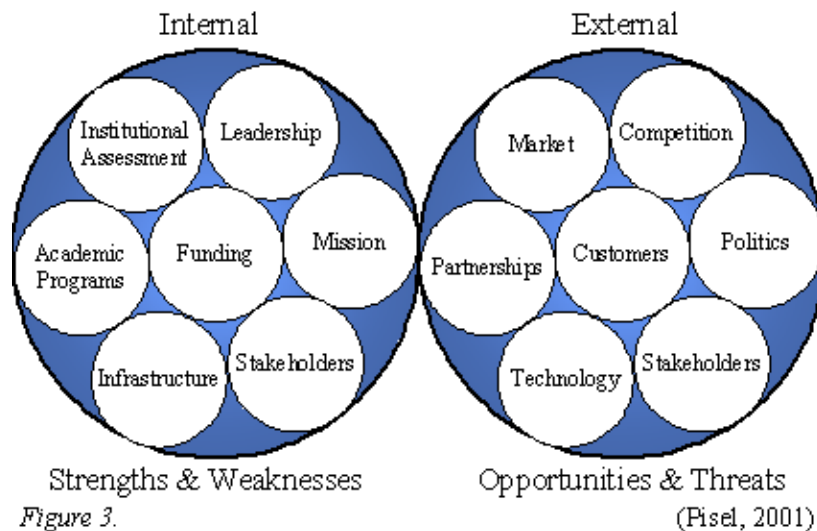
Phase IV – Mission Refinement

The Mission phase describes how distance learning is important to and aligned with the core mission and future vision of the institution. It is, perhaps, the most challenging phase because participants can spend so much time arguing about where they need to go that they run out of steam when it comes to actually going there. It is critical that the mission and vision define an achievable objective, but planners must guard against it becoming more of an intellectual than a practical exercise. If planners are not cautious, it may lead to seeing the plan as the end rather than the means to achieve it.

At the core of the Mission phase is the organizational vision. Unlike the mission, the vision is for internal consumption, designed to provide direction and inspiration for the organization (Aaker, 1992; Hoyle, 1995). The vision statement defines success, describing what it looks like and clearly establishing the institution's long-term core intentions. Two important elements of the vision are timing and organizational buy-in. It is critical that the ideal vision be developed first, before restricting the group's imagination with real-world data (Kaufman & Herman, 1991). It is equally critical that the leadership sell the vision internally. A vision not shared by the organization is a recipe for failure (Bothel, 2001).

While the vision is inspirational, the mission is to be stated in measurable terms that provide a clear and concise picture of what is to be accomplished and why (Kaufman, 2005; JFSC, 2002). It will serve as the basis for all phases to follow. This statement tells everyone what is to be accomplished, by whom (person or organization), when, where (target audience), and why. Normally, the "how" or the means by which the mission will be accomplished is left to the course of action (COA) development phase, but it may be known if the process is commenced with predetermined external direction. The focus of the mission is on the ends—not the means to achieve them. Kaufman stresses the importance of understanding the difference between ends and means. Ends are the desired results, accomplishments, and outcomes; means are the way to achieve those ends (1995). Means include such things as the resources and methods employed in a plan.

Strategy, because it is an organizational process, is inseparable from the structure, behavior, and culture of the organization in which it occurs (Andrews, 1987). Structurally, there is an organizational hierarchy that must be considered in developing the vision and mission. If, for example, a subordinate school is developing a strategic plan, it must align its mission and vision with the higher university plan (Kaufman, 2006b). Planners must also consider organizational culture and values—items identified in the internal analysis. The design, structure, and leadership of an organization are unique functions of its culture and values (Hardy, 1991; Murgatroyd & Woudstra, 1989). Ultimately, whatever strategy is developed will have to survive and be implemented through that same filter of culture and values (Vestal, Fralicx, & Spreier, 1997).

Phase V – Assumptions

Assumptions are one of the least understood aspects of planning. They are used to fill a gap in knowledge so

planning can continue. While they are absolutely critical to the process, they cannot be treated as items of convenience. A planning assumption is a hypothesis on the current situation or on the future course of events that is assumed to be true in the absence of positive proof and normally cover issues over which the planning team has no control. Only those items necessary to enable planners to complete an estimate of the situation and make decisions can become assumptions. A valid assumption has three characteristics: it is logical, realistic, and essential for the planning to continue. Because of their influence on planning, the fewest possible number of assumptions should be included. As planning proceeds, additional assumptions may be needed, some early assumptions may prove to be faulty, and still others may be replaced with facts or new information gained during the planning process. All planning assumptions should be documented to ensure that everyone involved—particularly those who join the process later—has a common frame of reference. This documentation also facilitates the Periodic Review phase by clearly stating what was assumed in planning.

Phase VI – Strategy Development and Courses of Action

Here, the analysis of the earlier phases is crafted into a strategic direction. Armed with the results of the gap analysis, the planning group should be able to move forward with strategic options for consideration and assessment. Course of action (COA) development begins with scouring the SWOTs analysis for its strategic significance. COAs will be designed to take advantage of internal strengths and external opportunities while trying to guard against threats and working to improve weaknesses. A key to the process is to keep an open mind and consider all options. While it may be counterintuitive, the best COAs may drive the institution to partner with potential competitors to fill the gaps (Freeman, 2004; Farrington & Yoshida, 2000; Hanna, 1998).

Once this analysis is complete tentative COAs are developed. Tentative COAs are unconstrained broad concepts that can be further developed to achieve the institutional mission and vision. Any number of COAs could be developed; however, they will typically be reduced to around three before being analyzed and presented for a decision. The last step in developing tentative COAs is to ensure that they are consistent with the mission and vision. Ideally, planners will specify how the COAs support the mission and vision to answer questions before they are asked. Once the planners have their acceptable COAs, they begin a process to refine and expand them. This step takes the process beyond identifying who, what, when, where, and why by specifying how the institution intends to achieve its mission and vision. An essential element of this step is to ensure that there is broad staff involvement and all stakeholders are informed. This is an opportunity for buy in.

Phase VII – Functional Analyses

With COAs developed, the next phase will be to review and compare them against a number of criteria. This analysis assesses whether each COA does the following: complies with any relevant policies; is feasible within the resources available or projected to be available; adequately achieves the stated mission; has acceptable costs; completely answers the questions of who, what, when, where, and why; and is sufficiently different so as to create a range of alternatives.

The purpose of this step is to have each staff element identify the strengths and weaknesses of each COA from their functional perspective. Functional analysis allows details to surface from functional experts that may not otherwise be visible to a planning team. This process is particularly important for a plan developed by a campus-wide team or administrators where members are two or three steps removed from actual implementation. When the planning is done by those directly involved in, or only one step removed from, implementation, most of these issues are addressed in the act of planning and thus unnecessary as a separate step; however, the process still can play a key role in gaining stakeholder acceptance.

Upon completing this analysis, the planning team briefs the leadership on the proposed COAs, makes a recommendation for one COA, and gives the rationale for that recommendation. Ultimately, the final element of this phase is a decision, which is best done as a written document.

Phase VIII – Implementation

Implementation is the phase where the lead shifts away from the planning team to those who will actually execute the plan. The institutional leadership must clearly define who has the authority and responsibility for implementation and formally task all elements of the organization that are responsible for support. Resources are allocated and any assumptions made about funding, personnel, or other assets are reconciled. Detailed operational or tactical plans, that identify near-term objectives that must be achieved as part of the strategic plan, are developed and implemented. An

implementation timetable is established to update and refine any milestones remaining from Phase II and add any new milestones as necessary.

Phase IX – Assessment

A common point of failure for strategic planning is the post-implementation period. Too often, the plan is developed and, once implementation begins, the process stops. Assessment represents the continuation of the process. It provides the data to allow continual minor or major course adjustments that bring the plan in line with (or refine) the mission and vision in response to whatever internal or external forces are affecting it. This phase employs both formative and summative assessments to gauge the success of the plan.

Formative assessment is part of a continuous loop that feeds into the previous phases of the process. There must be consistent, meaningful evaluation, with a willingness to act upon the findings for the process to succeed. Specific metrics (outcome, output, or process measures) must be defined to determine success and when and how it will be measured. Kaufman points out that there is also a threat associated with assessment: if the institution does not assess its strategic performance "using mutually agreed-on criteria, others will. And frequently, they will use criteria (often based on means and resources, not results and payoffs) that can be embarrassing as well as wrong" (2006a, p. 12).

Since strategic planning is a continuous process, the argument can be made that there is no summative assessment. However, in the context of this model, summative assessment refers to the evaluation of individual objectives and milestones as they are completed.

Phase X – Periodic Review

The Review phase enables the institution to adapt to short-term volatility while maintaining its long-term strategic vision. Review is a critical element of strategic planning. It recognizes that planning is a continuous systematic process and that the plan is a living document existing within a dynamic environment (Watkins, 2004). Periodic review is required to identify and assess the impact in changes to internal strengths and weaknesses, external opportunities and threats, assumptions, and the original mission and goals. The institution must establish some periodicity for the review process. Ideally, it can be aligned with existing cycles, such as the annual budget cycle or academic cycles. Finally, it must determine how lessons learned will be communicated and modifications made to the larger organization.

Conclusion

With advances in technology-driven delivery media, distance learning has done more than simply revolutionize the educational process. It has completely changed the strategic landscape. Institutions are no longer looking at a limited radius of a few hundred miles or the limits of state borders to gauge the competition or define the market. Competition and the market for the distance learning product are now worldwide. To succeed or survive in this environment, the distance learning institution needs to adopt a process that enables it to gird its position against threats and weakness while exploiting opportunities and strength. A strategic planning process, if properly executed, provides the answer to the challenges of today. However, Boar reminds us that the strategic planning process is more art than science and warns "the results of the process are only as good as the intellectual investment of the participants in thinking deeply about the issues. What makes the difference is insight, not rote execution of analytical steps" (1993, p. 15). The model outlined in this paper is intended to give detailed insight to the novice planner and a broad set of reminders to the more experienced, but in all cases, it will only be as good as the intellectual capital invested in the process.

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