A New Role for Planners: Transformation Architect

Donald Norris, Tim Gilmour, and Linda Baer

Strategic Initiatives Inc. MANAGEMENT CONSULTANTS

Introduction

This White Paper builds on our book, *Transforming for Turbulent Times: An Action Agenda for Higher Education Leaders.* The book describes a rapidly emerging knowledge, work, and learning ecosystem that is quickly changing society's expectations for higher education. It also provides action agendas and roadmaps that higher education leaders can use to navigate and execute the significant transformations their institutions will need to make to thrive in this new ecosystem.

To succeed in these efforts, we believe that these leaders will need senior staff who can support them with the design and execution of these transformation efforts. In this white paper, we call these staff *transformation architects,* and we argue that traditional higher education planners already have many of the attributes required to be successful in this new role and in so doing become indispensable to their institutions in turbulent, truly transformative times.

We also argue that to grow and sustain these transformation architects, institutions must:

- transform their *organizational structures, roles, and job descriptions*;
- define and develop *new mindsets, behaviors, and skills* for the transformation architect; and
- transform the *tools, processes, and partnerships* used in
  - ✔ futuring and planning,
  - ✔ crafting and executing strategy,
  - ✔ building organizational capacity,
  - ✔ developing new programs,
  - ✔ reinventing business models,
  - ✔ changing the institutional culture, and
  - ✔ deploying analytics to measure outcomes on the road to transformation.

This white paper explains how transformation architects can be developed to support, catalyze, facilitate, and orchestrate transformation. In the process, they can energize college and university communities to discover and seize future opportunities – and ignite hope about the future prospects for individuals and institutions in higher education.

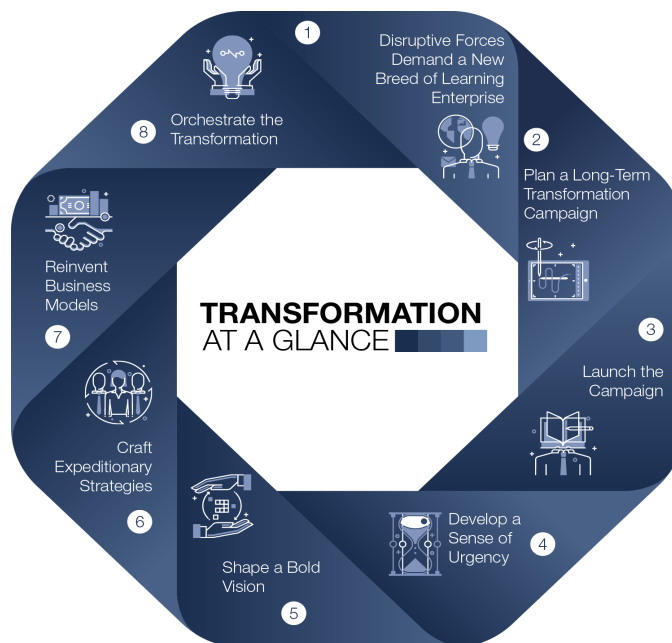## *A New, Indispensable Role for Planners – Transformation Architect*

We grounded our book on case studies of transforming institutions and the leaders orchestrating their journey forward. We found that such leaders recognize that transformations and the strategies developed to achieve them must be undertaken as holistically as possible through sustained transformation campaigns. Such efforts require extensive design and careful orchestration of execution across the entire institution. In the current organization of most colleges and universities, there is no position designated to accomplish these tasks on an ongoing basis. Although the institutions included in our case studies assigned this role in different ways, all had an individual assigned to this central coordination function.

To fulfill this role, we believe that there is a need for a new formal position at higher education institutions—***transformation architect***—analogous to the role of high-level system architect in the information technology world. We would further argue that many of the individuals currently assigned the role of institutional planner have many of the skills needed to fulfill this function.

How Will this Transformation Architect Operate Within the Organization?

In our book, ***Transforming for Turbulent Times***, we describe an eight-step process for transformation, which draws on the Kotter model for leading and navigating change (Harvard Business Review, November/December 2013) and other proven approaches. The work of the transformation architect is to assist in the organization-specific adaptation of this process and to coordinate and support its execution in each of the eight steps portrayed in Figure 1.

Figure 1

TRANSFORMATION AT A GLANCE

1. Disruptive Forces Demand a New Breed of Learning Enterprise
2. Plan a Long-Term Transformation Campaign
3. Launch the Campaign
4. Develop a Sense of Urgency
5. Shape a Bold Vision
6. Craft Expeditionary Strategies
7. Reinvent Business Models
8. Orchestrate the Transformation

The transformation architect will need to an arsenal of specific skills to successfully support the implementation of the eight-step process. These include:

- providing leadership across the institution, helping to design, mobilize and coordinate the work of the guiding and *ad hoc* coalitions tasked with carrying out the transformation campaign;

- furnishing futuring, insight, foresight and predictive analytics, and data analysis to enhance student success and institutional performance;

- supplying information on the trends and best practices needed to fuel the ongoing transformation expedition; and

- developing multiple scenarios and different ways of testing out futures that will improve student success and campus efficiency and effectiveness.

Evolve from Traditional Planner to Transformation Architect Requires Six Kinds of Jump Shifts

The transformation architect will need to evolve significantly different mindsets, behaviors, skills, tools, processes, and outcomes. These jump shifts create leaps in performance. They are presented in greater detail in Figure 2 on the next page. Planners questing to become transformation architects will need to change and strengthen their:

- **Mindsets.** Understand that transformation is imperative, that current business models are unsustainable and must be reinvented and recognize the need to change the existing higher education culture.

- **Behaviors.** Proactively champion planning for transformation and display the capacity to "think in the future tense."

- **Skills.** Demonstrate a stronger future focus, be conversant with the new tools for student success and affordability, acquire the capacity to help develop programs to prepare today's learners for the work and learning forces of the future, and attain the skills to help lead, navigate, and orchestrate change.

- **Tools.** Apply the latest analytical tools and understand how to use collaborations and technology to reinvent business models and create new value propositions suitable to the 2030 world.

- **Processes.** Become the experts in planning *and* strategy, meaningfully engage a broad cross-section of their institution's members in transformation, and the orchestrate the execution of transformation initiatives.

- **Outcomes.** Focus on measurement and achieving transformative outcomes. Support leadership in successfully planning for the world of 2030 and beyond and in rapidly transforming their institution into an engaged, agile, innovative, learning enterprise.

Figure 2
Jump Shifts From Traditional Planner to Transformation Architect

Characteristic	Traditional Planner	Transformation Architect
Mindset **Change** **Leadership** **Planning** **Business Models**	● Higher education changes incrementally, extrapolating current practices. ● Proven leadership techniques will be sufficient to preparing for 2030. ● Planning extrapolates current models and approaches into the future – seek to return to normal, post COVID. ● Can extrapolate current business models into the future with modest changes.	● *Higher education is facing looming disruptions that create the imperative to transform.* ● *A new breed of leader must engage and transform their institutions to thrive in 2030.* ● *A new breed of planner must think in the future tense and plan for the world of 2030.* ● *Higher education business models are unsustainable. They must be reinvented.*
Behaviors **Planning Processes** **Engage the Future**	● Reactive – Support and facilitate planning processes. ● Extrapolate the past into the future.	● *Proactive - Facilitate, influence, champion and inspire planning for transformation.* ● *Plan from the future backwards, create new futures, champion new practices.*
Skills **Future Focus** **Student Success** **Program Development** **Resilience/Chang**	● Capacity to extrapolate past/present practices into a changing future. ● Focus on improving retention, persistence & completion of existing programs. ● Extend existing program development approaches. ● Learn from COVID-era resilience practices.	● *Enhanced foresight, ability to simulate new futures, continuous strategic thinking.* ● *Build student success skills to include improving affordability. New data skills.* ● *Develop programs to prepare learners to succeed in 2030 work/learning ecosystem.* ● *Enhance skills to lead, navigate, and orchestrate change and resilience.*
Tools **Data, Analytics, AI** **Optimize Student Success** **New Program Development**	● Deploy first-gen analytics tools. ● Improve access, retention, persistence, and completion for existing program. ● Existing program development models.	● *Extend first-gen tools. Add AI-based analytics, simulation, optimize student success.* ● *Expand definition of student success to include affordability, career success over 60 years. Use AI-based tools.* ● *Use collaborations, technology to reinvent business models, create new value propositions.*
Processes **Planning and Strategy** **Orchestration of Change** **Transformative Change**	● Five-year planning horizon, siloed planning, so-called strategic planning. ● Reactive participation in change. ● Minimal to non-existent. Implement particular strategies and plans.	● *Ten-Year vision horizon, expeditionary strategies and project management, continuous adaptation.* ● *Engage broad cross-sections of institutions, mobilize guiding coalitions, and be proactive.* ● *Orchestrate many integrated initiatives. Concurrently execute expeditionary strategy, build organizational culture, change culture, deploy analytics.*
Outcomes **New Breed of Leader** **New Breed of Planner** **New Breed of Learning Enterprise**	● **Traditional higher education leaders.** ● **Traditional planner.** ● **Traditional college and university.**	● *Highly engaged leader, "shape shifter," helps reshape the enterprise.* ● *Think in the future tense, plan for the world of 2030 and beyond. Transformation architect.* ● *More engaged, open, innovative, affordable, and nimble. A gateway not a gatekeeper. Serves additional roles as curator, certifier, and pathfinder over learning and work careers spanning 60 years.*

The Transformation Architect Must Operate at the Senior Level with Substantial Staff Support

As you can see from the role transformation architects are expected to play, they will need additional support. This includes the information and analysis and planning functions that likely are already reporting to them, and they will also need high level professional staff who can help them with the coordination and alignment of the various transformation strategies underway at any given time.

How Do You Grow and Sustain Indispensable Planners?

In 2022, many institutional leaders are finding that their faculty and staff are stuck in a desire to return to the way things were before COVID. They do not seem to be able to break loose from the gravitational pull of past practices, nor do they have the time, tools, or techniques they need to do so. They cannot **think in the future tense** to create visions for the world of 2030 in which they prepare learners to thrive.

We have developed a set of proven practices to enable institutional leadership and coalitions to **concurrently** develop the mindset, behaviors, skills, tools, and processes to plan from the 2030 future backward and systematically transform. Starting immediately, budding transformation architects can be empowered to start and support these processes. Otherwise, most institutions will remain stuck in memories of the old normal until it is too late and new competitors beat us to the punch.

Transformation architects fulfil critical roles as: 1) champions of change; 2) futurists; 3) facilitators and coordinators of strategy and planning processes; and 4) orchestrators of the execution of transformation strategies. They fulfill these roles by ensuring the concurrent execution of integrated strategies, the building of organizational capacity, the understanding and evolution of culture, and by providing advanced analytics to measure the impact of the new strategies.

All of us participating in this conversation believe that this new breed of planner/strategist will be indispensable to the transformation of their institutions. **But the question for today is: How can leaders grow and support transformation architects at their institutions?**

Three sets of actions are needed to enable and empower transformation architects:

- create organizational framework, roles, and job descriptions to establish the position;
- provide opportunities to develop the mindsets, behaviors, and skills to fulfill the role; and
- transform the tools, processes, and partnerships used in executing the role.

These three elements are described below.

Create Organizational Framework Necessary to Establish the Position of Transformation Architect

Two sets of framework, structures and relationships are essential:

- well-defined frameworks, structures, roles, and descriptions for the transformation architect, and
- clear interconnected hierarchical and coalition network relationships for the institution.

Organizational Structure, Roles, and Job Descriptions. Let's begin with the elevation of the role of traditional senior planner to that of designer, facilitator, champion, and integrator of the execution of the overall institutional transformation effort. Cases in point: Mankato State University empowered the position of Vice President for Strategic Planning, Analytics, and Student Success to achieve these goals. Northern Kentucky University has created a Vice President and Chief Strategy Officer to play an analogous role. The School of Pharmacy – Boston at Massachusetts College of Pharmacy and Health Sciences (MCPHS) designated an Assistant Dean of Interprofessional Programs and School Operations/Associate Professor to perform thes functions. A range of other creative titles and job descriptions are appearing for the coordination and support transformation efforts elsewhere. More will be forthcoming.

To support the execution of specific transformation initiatives, we must also develop the talent of a wide range of planning staff and faculty and staff elsewhere in the institution. Such participants will need to develop many of the mind sets, behaviors, and skills of transformation architects. Their job descriptions must be reengineered to include these new behaviors, especially the advanced use of data analytics and augmented intelligence.

Transformation requires the President and all members of the President's Cabinet to learn and put into practice the mindset, behaviors, and skills of transformation architects. In addition, they must work as a fully integrated team, fully supporting each other, and the work of the transformation architect.

Over the next decade and beyond, higher education will require significant investment in, and focus on, talent development for these transformative behaviors at ***al***l organizational levels.

Hierarchical and Network Structures and Relationships. Traditional planning processes must be reinvented, morphing into highly participatory transformation campaigns. They must utilize far-reaching vision horizons that stretch the imagination and produce adaptable, expeditionary strategies. These campaigns will feature two structures: 1) the traditional ***Organizational Hierarchy***, which leads day-to-day operations, and 2) a Network led by a ***Guiding Coalition*** that coordinates four to six Initiative Coalitions, together mobilizing hundreds of participants and focusing the institution on its pursuit of transformative opportunities. It is in this network where the preponderance of the transformation occurs. Both structures operate concurrently and coordinate their work through overlapping roles and active outreach and communication at all levels.

Developing the Mindsets, Behaviors, and Talents of This New Breed of Planner

Many current planners already possess a good share of the mindsets, behaviors and talents needed to ably serve as transformation architects. That's why we believe they are great candidates for the role. That said, most will have a lot to learn. We have identified four ways they can obtain the mindsets, behaviors, skills, and talents they need to function effectively:

Planners Can Participate in a "Getting Started with Transformation" Webinar and Follow-on Experiences. Such webinars, more than anything else, communicate just how different transformation and the work to bring it to fruition is. Such webinars communicate both the concurrent development of skills on many dimensions and the sequential steps needed to engage top leadership in understanding the evolution of the transformation architect and what it can mean to the institution. Participants should come out of the webinar impressed with how much they need to learn – and ideas about how to acquire that knowledge and skill sets to succeed, by becoming:
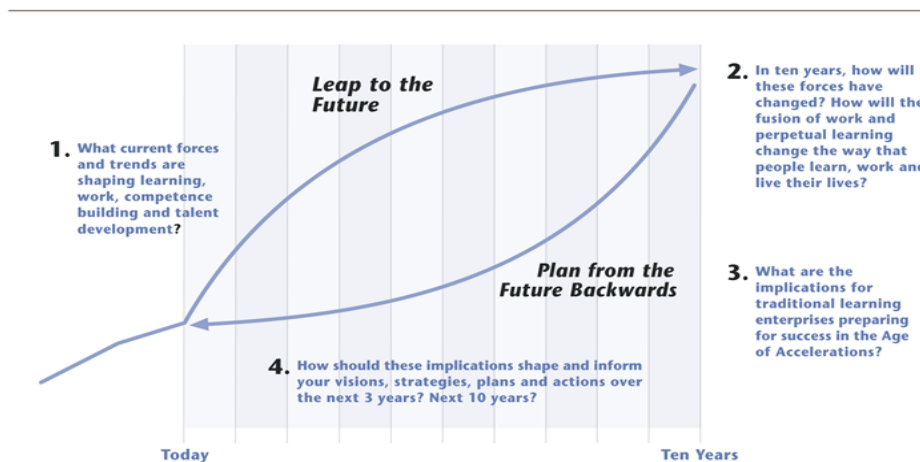
- futurists by monitoring and learning about future trends for higher education,
- skilled in coalition building and change management techniques, and
- able to use data and analytics to support big picture thinking and strategy.

Planners Can Learn and Adopt the Best Practices of Successful Transformative Leaders and Planners. They should:

- make personal/professional jump shifts from traditional planner to a transformation architect,
- learn how to help lead and navigate transformation,
- develop the capacity to optimize student success using analytics, and
- learn how to prepare learners to succeed in 2030 work/learning ecosystems.

Planners Can Learn How to "Plan from the Future Backward" by Participating in a Facilitated Session with Others. This exercise is one of the key tools that enable planners to think in the future tense.

Figure 3
Planning from the Future Backwards

1. What current forces and trends are shaping learning, work, competence building and talent development?

Leap to the Future

2. In ten years, how will these forces have changed? How will the fusion of work and perpetual learning change the way that people learn, work and live their lives?

Plan from the Future Backwards

3. What are the implications for traditional learning enterprises preparing for success in the Age of Accelerations?

4. How should these implications shape and inform your visions, strategies, plans and actions over the next 3 years? Next 10 years?

Today   Ten Years

7

Planners Can Acquire Micro-Credentials and/or Degrees in Data Analytics, AI, Simulation, and other Future-Oriented Skillsets. The availability of these learning and upskilling options will grow dramatically. They will be embedded in work experiences. Skills achieved in this manner will be essential in the transformation to 2030.

Reinvent/Discover the *Processes and Embedded Tools* Transformation Architects Need to Succeed

We have focused on four processes that have been reinvented to support successful transformation campaigns and leadership teams, guiding coalitions, and other participants in leadership campaigns:

Our Eight-Step Process for Leading and Navigating Change. As described earlier in this paper, this process is basically the Kotter Change Model on steroids, coupled with other proven practices. It provides leaders with the guidance they need to create a climate for change and enable their entire organization to participate in the transformation from the outset.

Planning from the Future Backward, Crafting Expeditionary Strategies, and Reinventing Business Models. Once there is a realization that there is a need for transformation and a compelling vision defined, these tools are needed to envision and design transformational initiatives. If done well, these initiatives take the institution to places it has never been, much less imagined it could be.

Orchestrating Transformative Change. Perhaps the most difficult part of transformation, however, is successful execution. Our orchestration approach includes five elements, which must happen in a highly coordinated fashion as depicted in Figure 4 on the next page:

● transformative leadership,
● the relentless execution and correction of expeditionary strategies,
● the transformation of the organization culture to match and support the requirements of the strategies,
● the leveraging and strengthening of the institution's capacity to execute, and
● application of objective measures and analytics to measure and understand the impact of the transformation initiatives.

Transformation architects are especially critical in the orchestration of transformation. They coordinate the execution of the five intertwined elements in the figure, plus the measurement and analysis of progress toward transformative goals. This is where the transformation architect demonstrates their indispensability to the enterprise as it transforms through turbulent times to new levels of performance and value.

Figure 4

Orchestrating Transformative Change
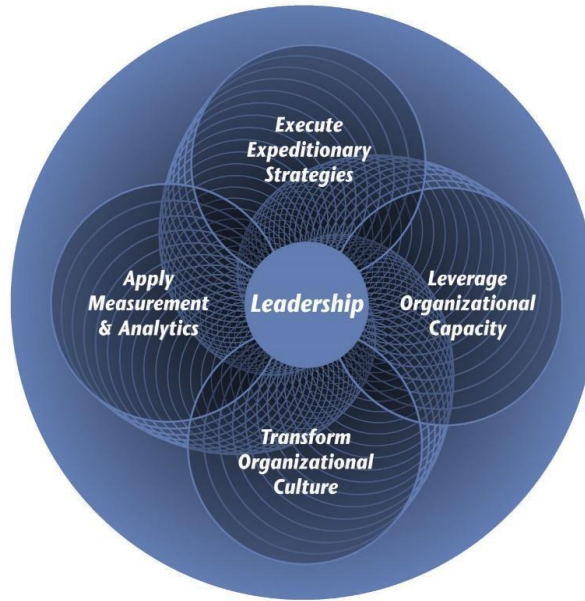
STRATEGIC INITIATIVES ©2021

Leveraging Partnerships for Program Development and Curation. For most, if not all institutions, partnerships will be essential tools to mount offerings of high quality that are affordable, provided in a timely fashion, and tailored to the emerging 2030 work/learning ecosystem. In the future institutions simply will not have the agility and ability to scale the kinds of offerings partners can provide and that they will need to thrive in the emerging learning and work ecosystem.

Conclusion

We have explained a range of actions that institutional planners must take to acquire the mindsets, perspectives, behaviors, and skills needed to become transformation architects. We have also described the tools, processes, and organizational structures that leaders must create, in collaboration with planners, to enable transformation. We believe that the role of transformation architect will be incredibly important to the future of planning and SCUP.