



Here's a simple activity that you can use to temporarily move out of the moment and prepare your campus for the future.

Looking Beyond the Moment

By Larry Goldstein
and Patrick Sanaghan

HORIZON THINKING IS ONE OF THE MOST IMPORTANT ACTIVITIES IN WHICH CAMPUS leaders can engage. Given the complexity of today's higher education climate, institutions that operate from moment to moment struggle to meet a multitude of challenges. Without looking toward the horizon and developing a related plan, campuses are forced into a reactive mode and find it difficult, if not impossible, to get ahead of the curve. Focusing on the challenges that are likely to be encountered in the future creates an opportunity to formulate responses and solutions before problems develop.

The Future Timeline is a planning activity we have used in consulting with a variety of institutions to surface the events, issues, and trends that are likely to have an impact in the future. More important than merely raising issues, the design of the activity produces appropriate responses.

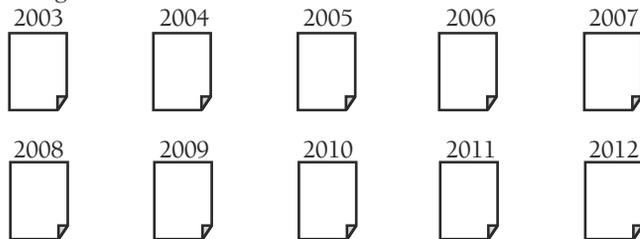
Focusing on the challenges that are likely to be encountered in the future creates an opportunity to formulate responses and solutions before problems develop.

The Future Timeline is flexible in that it can be used with either intact groups, such as a cabinet or division managers, or diverse groups of individuals coming together for a specific purpose. It can be used for groups as small as 10 and as large as 75. In one extreme case, the activity was used with 150 participants attending a conference. Even with a larger number of participants, the activity can be conducted in approximately 1 1/2 hours. The ideal environment is a large room with ample wall space (at least 30 feet of space to which flipchart paper can be attached).

The following example assumes 48 participants led by a facilitator. Given that this is a relatively straightforward activity with easy-to-follow instructions, just about any manager should be able to conduct the Future Timeline.

Step 1

In preparation for the activity, a series of flipchart sheets must be arranged across a wall of the room as indicated below:



Step 2

At the outset of the activity, the facilitator welcomes participants and explains the purpose of the meeting (i.e., collective thinking about the future). The facilitator then explains that participants should think in terms of future events, trends, and issues that could impact or influence the way the institution (division, unit, department, etc.) provides services, conducts business, or operates over the next 10 years. It is important to provide definitions of terms for common understanding. The following information can be provided as a handout or on a flipchart. (If using a flipchart, remember to write for visibility to the entire audience.) The amount of time required for the welcome and the explanation of the activity is approximately 10 minutes.

- An **event** is a single occurrence (e.g., passage of a key piece of legislation or retirement of the chancellor).
- An **issue** is an important theme that has substantial power and influence to impact an institution (e.g., faculty unionization or aging of the workforce).
- A **trend** is an ongoing set of circumstances that has consistency and momentum (e.g., decreasing enrollment, increased emphasis on sponsored research, or an economic downturn).

Step 3

After reviewing the definitions to confirm participants' understanding, the facilitator provides each participant with 5 to 10 large Post-it notes. The participants are instructed to write one event, issue, or trend per note. Once the Post-its have been filled out, the participants place each note on the flipchart for the specific year when the event, issue, or trend is expected to occur.

The facilitator should encourage participants to stretch their thinking to include the farthest-out years of the 10-year period. Although this is a serious endeavor, everyone understands that no one has a crystal ball. Still, it's helpful to remind people that this is about "possibility thinking," and they needn't worry about making mistakes.

Participants are instructed not to duplicate an event, issue, or trend. If they discover that the item already appears on the timeline, they should simply place a check mark (✓) on the existing Post-it to indicate agreement and tear up their own note. This will reduce redundancy and still capture the data. However, if a participant expects an event, issue, or trend to occur in a different year than is already indicated on the timeline, it's okay to have the same item appear more than once. The overall time allotted to this activity is approximately 10 to 15 minutes. The group now has generated a tremendous amount of information that needs to be distilled and understood by everyone.

Step 4

Small groups are employed to synthesize the data. To accomplish this, the participants are divided into eight groups of six by having them count off from one to eight. The small groups are then asked to identify the three most important challenges facing the organization. They accomplish this by reviewing the various events, issues, and trends. Their objective is to become "data detectives" regarding the future. Once they have investigated the timeline, each small group discusses what it has learned about the future.

Once the groups have completed the exercise working on their own, the facilitator captures the ideas in a master list. Using a flipchart, the facilitator takes one idea from each group, round robin style, making as many rounds as necessary to capture every idea. If a group has a recommendation that already has been mentioned, this can be indicated on the master list by a check mark. Checking for duplication is important because it helps establish a sense of priority for the master list. The time needed for the synthesis and development of the master list is approximately 20 to 25 minutes.

Step 5

Now that the group has a prioritized issues list, it's time to consider what will be done to respond to those issues. As above, the assignment for each group is to identify three recommendations that benefit the organization and respond to the information in the timeline.

The facilitator again creates a master list by taking one idea at a time from each group, indicating agreement with check marks. Approximately 15 to 20 minutes will be needed to complete this effort.

Step 6

The final step in the process is to express appreciation to the group and explain how the recommendations will be used. Several options are available for this step. We recommend that the event organizer have the master list transcribed and forwarded to the participants. This helps to create a sense of commitment on the part of the organization. By publicly issuing the list, those responsible for orchestrating the activity will be more likely to follow through on the specific recommendations coming out of the activity. For instance, the activity might have been conducted as part of data gathering in support of strategic planning. If that's the case, the individual driving the planning process can assign the recommendations to the appropriate organizational segment for consideration along with other input.

The final steps are slightly different if the activity is conducted with diverse groups. We've used this activity as part of workshops involving a variety of organizations. Obviously, the way in which the information will be used differs when the participants come from different organizations. Even though it is unlikely that the participants will have a shared commitment to specific outcomes, it still is recommended that the master list be shared with the participants. The receipt of the list following the participants' return to campus reminds them of the activity and encourages them to try it on their campus.

Actual Results With AJCU

While we've conducted the Future Timeline in a number of settings—both with intact and diverse groups—a recent use was at the annual conference of the Association of Jesuit Colleges and Universities financial vice presidents. As part of the conference, AJCU held a workshop on planning. The Future Timeline was used to illustrate the importance of data gathering as well as to demonstrate the ease with which business officers can facilitate campus

New Business Officers Program to Feature Future Timeline

Practicing horizon thinking with the Future Timeline exercise is a highlight of NACUBO's New Business Officers Program, a select two-day workshop, July 25–26, held prior to the NACUBO Annual Meeting in Nashville.

Last summer's program participants—35 top-level business officers from public and independent institutions—considered the future with regard to the issues, events, and trends expected to profoundly affect the management of higher education. The challenge of leadership transition and its impact on a campus and the management team were identified as the top issues. Other horizon issues the group identified as having potential for the greatest impact were:

- **Financing technology:** How will campus needs continue to be met?
- **Distance education:** Is it a potential threat, and what about the cost?
- **Facilities:** How will adequate facilities be provided for, whether addressed through new buildings or renovation?
- **Economic problems:** What are the long-term implications of today's economy?
- **Aging resources:** How are both physical and human resources renewed and replenished?

In the New Business Officers Program, facilitators Larry Goldstein and Pat Sanaghan will use the Future Timeline to set the stage for further focus on the expanding role of the chief business officer. Veteran CBOs and presidents will offer perspectives and answer questions about board relationships, meeting the needs of the president, public policy, managing risk, and other demands of the position.

Applications for the New Business Officers Program are being accepted. Acceptance to the program requires that you hold the most senior financial/business officer position at your institution; report to the president; and have a tenure of three years or less in the position.

For further information and an application, visit www.nacubo.org or call (202) 861-2584.

We strongly favor inclusive planning efforts that involve administrators, line staff, faculty, students and representatives of any other major stakeholder group that will be affected by future activities.

horizon-thinking activities.

The group consisted of approximately 50 participants, including campus representatives and representatives of commercial organizations sponsoring the conference. The facilitator deemed it important to isolate the perspectives of the two groups. To accomplish this, the campus representatives were divided into one set of small groups while the sponsors were divided into a separate set of small groups. The Post-it notes given to the two sets of small groups were different colors, which were based on their status as campus or sponsor representatives. This was an intentional part of the design, and it demonstrates the flexibility of the activity. Because the groups operated independently of each other, it was possible to divide the outcomes into two categories: those suggested by the campus participants and those suggested by the sponsor representatives. The different perspectives of the two groups are apparent in the responses they developed.

The top four recommendations for addressing issues identified by the campus representative groups appear below, with check marks indicating the number of times a response was offered by more than one group.

- Respond to security threats affecting campuses, including the development of contingency plans to respond to a major crisis (e.g., loss of a significant percentage of applicants for a given academic year due to a terrorist event on or near a campus) ✓✓✓
- Focus on cost as an issue; implement cost controls; include differential support for academic (and other) units based on their potential for excellence and critical significance to mission ✓✓
- Engage in succession planning/capacity building ✓✓
- Engage in cross-institutional collaboration on instruction and related activities ✓

The list below represents the recommendations suggested by the sponsors participating in the activity.

- Cut programs; decide, as an institution, what to be and what to do; consider merging with other institutions.
- Recognize existing threat for students participating in international programs and develop contingency responses.
- Leverage sponsor resources with U. S. Jesuit Conference to address social awareness issues.

The sponsors' list clearly demonstrates the different thinking employed by those providing services to campus-

es as compared with those working on a campus. The campus representatives didn't consider closing programs or merging with other institutions. Similarly, the sponsors identified the genuine risk attached to students participating in international programs. It's possible that the campus representatives may reject the responses suggested by the sponsor representatives but, based on the discussion during the activity, it's much more likely that both sets of responses will be given equal weight.

This raises another issue that is important to keep in mind when conducting horizon-thinking activities on campuses. Different stakeholders will bring different perspectives to the process. We strongly favor inclusive planning efforts that involve administrators, line staff, faculty, students, and representatives of any other major stakeholder group that will be affected by future activities. Students in particular will have a different perspective than faculty or staff. The fact that they are generally younger, coupled with their role as customers, enables them to think differently than other stakeholder groups. Their perspective usually is critical to planning efforts because it is typically the case that an overall objective of planning is improved services to customers.

The Future Timeline is a participative activity that does not require special facilitative skills and can be conducted easily with almost any group. (To learn more about it, see the NACUBO book *Intentional Design and the Process of Change*, by Patrick Sanaghan and Rod Napier, which can be ordered at www.nacubo.org/publications.) By letting this activity move you out of the moment for just a little while, you can identify key events, issues, and trends requiring your attention and make sure your institution is prepared for what's beyond the horizon.

Author Bios Larry Goldstein is president of Campus Strategies, Crimora, Virginia, and a NACUBO senior fellow. Patrick Sanaghan is president of the Sanaghan Group, Doylestown, Pennsylvania.
E-mail larry.goldstein@campus-strategies.com; sanaghan@aol.com



Larry Goldstein



Patrick Sanaghan