

STRATEGIC PLANNING AS AN ESSENTIAL FOR QUALITY ASSURANCE

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Abstract

In the dynamics of planning and quality management, Strategic Planning can no longer be separated from Quality Assurance, nor can Strategic Planning or Quality Management work in a vacuum of information. To demonstrate the linkages, the triangularization of planning-information-quality (Teay, 2008) was expounded in the QMIPS (Quality Management, Information and Planning Systems) framework (Teay, 2007). This led to the imperatives of a Strategic Performance Management System (SPMS) that addresses the QMS (Quality Management System), IMS (Information Management System) and the PMS (Planning Management System). Strategic Planning has a history of developmental excellence but execution paucity. The key issue is “what and how” to action on the strategic plan. The importance of realizing the lofty mission of the HEI (Higher Education Institutions) is a herculean and tough task. In addition, the quality management must be developed within the strategic management context. This paper will illustrate a framework using the SPMS to link the quality plan to the strategic plan by using a simplified identification and development of a strategic plan based on the “position” and “capabilities” fundamentals of strategic management on strategic analysis and formulation. It will then illustrate strategic implementation of the plan by the cascading of the vision, mission, goals and objectives from the Strategic Plan into the goals and objectives of action plan and its corresponding projects development and budget requisition. The linkage of the quality management is through the metrics developed to measure the performance achievement of the projects and its budget as stated in the objectives. This would resolve the problem of alignment and the execution of the various projects based on the action plans to achieve the overall strategic plan and its mission in a structured and measurable approach that assures quality.

Keywords: Quality Management, Information Management, Planning Management, Strategic Plan and Action Plans. Alignment and cascading of the vision, mission into achievable goals and measurable objectives.

Introduction

QUALITY is an ever elusive and evolving, omnipotent and ubiquitous powerful business mechanism that has been used and manipulated by organizations to convince consumers that its product and service offers has achieved a level of acceptance based on certain standards and criteria. Even the education industry has not escaped from this quality syndrome and all HEI (Higher Education Institutions) are bent on having their educational products and services achieve a certain level of acceptable standards and criteria that finally leads to its being accredited or certified “fit for purpose”. The key question is “what is quality in education?” Experts and exponents have searched and researched high and low for a definitive definition that constitutes “quality education”.

Vroeijenstijn (1991) said “it is a waste of time to define quality” as it is a relative concept, but does this mean that we do not action on Quality? Rather than trying to define “quality education”, one can start with the HEI’s purpose or mission under pinning national and social development through skilled manpower through 3 activities and action on these key activities which are:

- Producing competent and qualified graduates to meet the organizational needs in all sectors
- Pushing forward the frontier of knowledge via research
- Developing society through community services

HEI have a responsibility to the society to develop the future societal human capital through its educational value that they propose to the stakeholders (students, alumni, employment market, etc.). Conti (2005 and 2006) emphasized the need of understanding the quality management from the systems perspective by extending the quality management concepts of economic transactions to social relations by creating value to the stakeholders. This quality perception becomes “judgments of values” that are intrinsically associated amongst the relationships of men and its environment that consist of exchanges of values.

This is a summation of its product quality, service quality, image, relationships divided by the buyers’ cost (Gale, 1994). The creation and delivery of educational value is through the internal processes of the institutes and its schools’ operation, stakeholders, innovation and regulatory and social processes management (Kaplan and Norton, 2001 and 2004). The key issue is the alignment through strategic management and the measurement of achievements through quality management of these internal processes to create on this educational value proposed to the stakeholders. In trying to find an answer to this issue, the first part of the paper explores the key components of quality, information and planning underpinning education excellence to align the integrated learning and growth of the human capital, information capital, and organization capital that utilizes the internal processes to create value. This integration and linkage mechanism uses the triangularization of the 3 main core systems of quality management, information management and planning management (Teay, 2008) as these covers most aspects of the creation and delivery of the educational value of the HEI. The second part will deal with developing and auctioning the strategic plan based on the quality drive.

Part I: Strategic Quality and Performance Management

1.1 Quality in Education

Successful quality management requires one to understand the context of the HEI mission which represents its “reason for existence” or its very purpose of the HEI. What the HEI does or sell must “fit for purpose” (Teay, 2007). This inevitably means that Quality in education is implicitly and explicitly about:

- The outputs and outcomes of education which is of use that is fit for some purpose,
- The stakeholders of “the provider” and “the user” of education,
- The move forward towards improvements or innovations in education,
- The actions and activities in doing something in education effectively and efficiently.

Holistically, since the late 80’s and into the 1990’s Quality in Higher Education and key literatures in Quality in Higher Education (ENQA – European Association for Quality Assurance in Higher Education, 2005; Greene, 1994; Teay, 2005, 2006 and 2007) has iterated and reiterated that Quality in Higher Education had been, is and will always be about and actioned through:

- ✓ Traditional quality definition of *benchmarking* to the best which might not be within the same context or content. As such, benchmarking to the best in an appropriate way based on the internal and external context.
- ✓ *Conformance to Specifications or Standards* which is static in nature as the criteria used to set the standard is unclear and that they are easily measurable and quantifiable which is not the case in higher education. Under such a situation, Conformance and Compliance to Specifications or Standards normally use proxy measures and assessment methodologies for the subjective quality educational performance measure qualitatively and quantitatively.
- ✓ *Fit for Purpose* – emphasis on specifications based on the “mission or reason for the existence” of the HEI that is developmental as it recognizes purpose might change over time thus requiring re-evaluation of appropriateness of specifications.
- ✓ Quality as effectiveness in *achieving institutional mission and goals*.
- ✓ Quality as *meeting customers’ stated or implied needs*.

To meet the basic principles of HEI and its quality requirements as noted above, key education standards and criteria worldwide that has a valid accreditation process must effectively address the quality of the institution or program in the following areas:

- ✓ Success with respect to student achievement in relation to the institution's mission, including, as appropriate, consideration of course completion, State licensing examination, and job placement rates.
- ✓ Curricula.
- ✓ Faculty.
- ✓ Facilities, equipment, and supplies.

- ✓ Fiscal and administrative capacity as appropriate to the specified scale of operations.
- ✓ Student support services.
- ✓ Recruiting and admissions practices, academic calendars, catalogs, publications, grading, and advertising.
- ✓ Measures of program length and the objectives of the degrees or credentials offered.
- ✓ Record of student complaints received by, or available to, the agency.
- ✓ Record of compliance with the institution's program responsibilities, the results of financial or compliance audits, program reviews, and any other information pertaining to quality assurance

In summation, fundamentally, five standards of quality assurance (Schray, 2006), that any education institution must address are that they:

1. Advances academic quality;
2. Demonstrates accountability;
3. Encourages purposeful change and needed improvement;
4. Employs appropriate and fair procedures in decision-making; and
5. Continually reassesses accreditation practices.

1.2 Quality and Performance Management in HEI

A HEI, like any other organization has specific processes that support the achievement of its teaching-learning-research missions and contribution to academic and societal development of the community and stakeholders at large. The 3 key processes (Ashworth, 1999; Childe *et al.*, 1994; CIM-OSA Committee, 1989) are: the operational processes (that create, produce and deliver on educational value), the support processes (that support the operational processes (Garvin, 1998; Porter, 1980), and the management processes (encompassing the goal setting, controlling and organizational behavior processes).

This underlies the imperatives that quality in the HEI must move from a monitoring stance to that of management focused on strategy (Cullen, *et al.*, 2003) that supports management through measurement (Bourne, *et al.*, 2005). This highlighted that the internal context factors that are interactive in nature are much more complex than the existing simplistic physical and formal systems affecting performance. The performance model of Martz (2001) for a university setting had the principles: to define performance expectations, create attainable but challenging goals, furnish clear measurements, encourage involvement and provide process clarity and feedback.

The rationale of this paper supports Andersen *et al.*'s (2006) holistic approach of harnessing the various tools and concepts into an overall framework where their inter-linkages are understood when responding to the internal and external challenges. While most of the framework looks at the macro or big picture, Rouse and Putterill (2003) proposed a macro-micro linkage of the: 1) interface between organization and stakeholders, 2) capacity and capability of resources, 3) planning-evaluation and resource-achievement, and 4) the basic core elements of input-activities-output. This approach of moving from the big picture at the organizational level (strategic plan)

to the operational level (action plans) is the key determinant of success supporting Franco-Santos *et al.*, (2007), Bernardin *et al.*, (1998), Kennerly and Neely (2002), Harrington (2005), Newkirk-Moore and Bracker (1998), Temporal, (1990) Bolt, (1993), Burach *et al.*, (1997), Tovey, (1991) and Mason, (1993) views that were not addressed.

Education management had traditionally been viewed through the myopic lens of education fundamentals as opposed to the management fundamentals used in any profit or non-profit organization. The “strategic management or basic management of the organization” is alienated to the conservative views of education. It is important that the conservative education fundamentals be viewed through the strategic management lens to bring out the best of both principles – a marriage of education fundamentals and sound management principles. As a start, education quality is an unquestionable imperative that must be supported with clear evidence or an evidence-based performance management system that are used as the planning parameters. It can be argued that the strategic triangularization of the quality-information-planning domains as expounded here, could lead to better education performance through the creation and delivery of educational value meeting the needs of the stakeholders and society. The HEI basic accountability is through a well-planned and managed systematic approach towards education management. This is illustrated through the QMIPS (Quality Management, Information and Planning Systems) developed as an initiative towards performance management.

1.3 Imperatives of a Strategic Performance Management System (SPMS)

Quality Management System (QMS) implemented under the paucity of Planning Management System (PMS) and Information Management System (IMS) that are not aligned has been the dearth and death toll of most QA system that at best is paying lip-service to QA or just going through an annual or a 5-year audit and assessment cycle that do not bring about improvements and innovations (Teay, 2007 and 2009). QA without improvements and innovations, or that does not bring about learning and integration with other systems is a poor system at best that is not well planned and lacking of an evidence-based system as shown in Fig. 1 (Teay, 2007 and 2009). To capitalize on QA, it should be linked to the planning and information management systems through the strategic performance management framework laying the foundation for continuous improvements and innovations based on management through measurement and an evidenced-based mechanism as shown in Fig. 2.

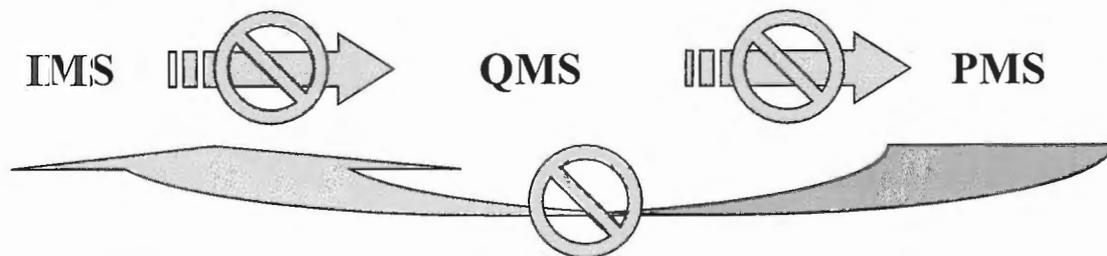


Figure 1: Non-alignment of the IMS, QMS and PMS

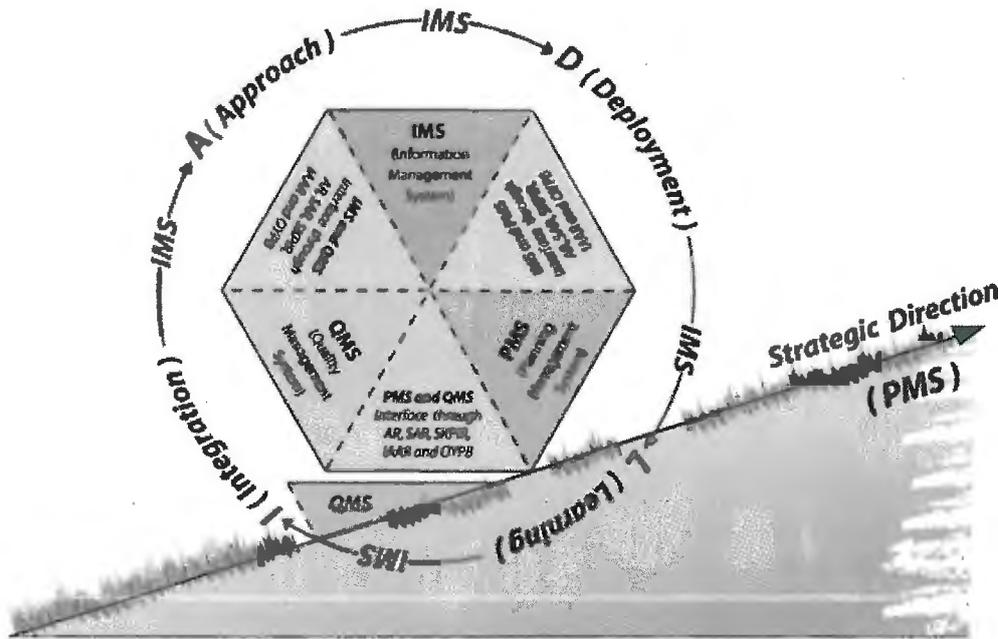


Figure 2: The mechanics and alignment of the PMS – IMS – QMS

Source: Teay, S.. (2009), Strategic Performance Management System (International Edition, 3rd Edition, January 2009), Assumption University Digital Press, Bangkok, Thailand

This naturally brought about the evolution of the internal systems with the imperatives that the triangularization of planning-information-quality that must be managed holistically rather than independently. The HEI needs to streamline and align all its planning and budgeting operating procedures to identify and produce data and evidence for the assessment of the performance outcomes to make them less tedious and chaotic, more efficient and effective in terms of time and efforts through a standardized and disciplined well-planned approach. To dispel the issue of alignment of the key systems critical to the success of an IQA (Teay, 2007 and 2009), Figure 2 tries to show the inter-linkages of the 3 main sub-systems in the Strategic Performance Management System (Teay, 2007 and 2009). This meant that a full-blown SPMS (Strategic Performance Management, System) needs to be created and put into operation to ensure the linkages and interactions of the QMS (Quality Management System) the IMS (Information Management System) and the PMS (Planning Management System) are fully aligned and are congruent with each other.

Used in conjunction and in tandem with each other, the QMS and the PMS with the IMS as the evidence based mechanism; the SPMS will serve as the foundation of the performance management and the governance systems of the HEI. The SPMS is designed to be non-prescriptive, generic in nature so that the academic and administrative units can use them as the minimum guiding principles in strategically managing their units but are aligned in the same strategic direction to achieve the HEI's mission and commitment to the students and society. The

journey to achieve quality performance will be tough but if it is well-planned and approached through basic management fundamentals, the tough and tumultuous journey can be softened and heightened to reach higher heights and more lofty aspirations.

The SPMS framework as discussed is aimed at achieving a common linkage across the PMS-IMS-QMS to achieve the HEI “management through measurement” approach. It is also meant to be a pragmatic approach to show how the HEI can use this as a guideline to create their customized performance management system. It is hoped that this framework will help all HEI in their pursuit for “education excellence” through the performance management system that is managed strategically.

- The *PMS (Planning Management System)* represents the strategic direction of the HEI specifying its key vision, mission, goals and objectives that are achieved through its strategies. These define clearly and specifically the strategic direction that the HEI intends to achieve in its 15-years strategic plan supported by its OYPB (One-Year-Plan-Budget) that continuously evolve to achieve its strategic direction. The goals identify the “what to achieve based on its mission” and the objectives identify “what are the measurement of its achievement”
- The *IMS (Information Management System)* represents the networks and database system developed to collect, collate, store, process and disseminate key data, facts, information that forms the evidenced based decision making and the measurement based on its defined goals and objectives. It will be noted that the IMS serves as the rotating PDCA concept of Plan – Do – Check – Act that has evolved into the newer ADLI concept of Approach – Deployment – Learning – Integration as expounded in the 2007 and 2009 MBNQA Education Criteria for Performance Excellence (NIST, 2007 and 2009).
- The *QMS (Quality Management System)* that serves as a wedge to avoid the slippage back to square one is based on the MBNQA framework that has 2 main areas of Process and Results leading to the overall audit and assessment of the performance measurement and management as defined in the PMS. As seen above the QMS acts like a wedge that prevents the HEI’s performance to slip and the ADLI leads to its continuous journey up the slope towards its strategic direction. The "Process" refers to the methods the HEI uses and improves to address the Item requirements. The four factors used to evaluate process are Approach, Deployment, Learning, and Integration (ADLI) as follows:
 - "Approach" refers to
 - the methods used to accomplish the process
 - the appropriateness of the methods to the Standard, Criteria and Item requirements used to implement the QA
 - the effectiveness of the use of the methods
 - the degree to which the approach is repeatable and based on reliable data

and information (i.e., systematic)

- "Deployment" refers to the *extent* to which
 - The HEI approach is applied in addressing Item requirements relevant and important to the HEI
 - The HEI approach is applied consistently
 - The HEI approach is used by all appropriate work units
- "Learning" refers to
 - refining the HEI approach through cycles of evaluation and improvement
 - encouraging breakthrough change to the HEI approach through innovation
 - having refinements and innovations with other relevant work units and processes in the HEI
- "Integration" refers to the *extent* to which
 - The HEI approach is aligned with your organizational needs identified in the HEI Organizational Profile and other Process Items
 - The HEI measures, information, and improvement systems are complementary across processes and work units
 - The HEI plans, processes, results, analyses, learning, and actions are harmonized across processes and work units to support organization-wide goals
- "Results" refers to the HEI's *outputs and outcomes* in achieving the requirements in processes above. The four factors used to evaluate results are LeTCI:
 - Level (Le) – The HEI current level of performance
 - Trend (T) – The rate (i.e., the slope of trend data) and breadth (i.e., the extent of deployment) of the HEI performance improvements
 - Comparison (C) – The HEI performance relative to appropriate comparisons and/or benchmarks
 - Integration (I) – The linkage of the HEI results measures (often through segmentation) to important student and stakeholder; program, offering, and service; market and strategic challenges as defined in the HEI Organizational Profile and in Process Items.

Part II Strategic Management aspects of the Quality Drives

2.1 Strategic Management in Higher Education Institutions

Since the 90's Education has been viewed from the management lens which is appropriate in the sense that "education must create value to the end consumers", and "education must have a purpose" that is normally defined within the quality means to a quality end. Inescapably, education as looked through the management lens is built on the management principles of POC³ (Planning, Organizing, Communicating, Coordinating and Controlling), the Quality lens of PDCA (Plan, Do, Check and Act). A more forward approach is to use the Performance lens of ADLI (Approach, Deployment, Learning and Integration) and the Results lens of LeTCI (Level, Trend, Comparison and Integration) of the performance results. As such, education in meeting the stakeholders' needs and requirements, its education creation and delivery of value must be strategic (deliberation of the intent of the institution based on its purpose or mission).

A key question that all strategic education managers must address is "what is strategic management and what is strategic planning?" within the education context. In addressing the strategic management of a HEI (Higher Education Institution), there are 3 basic questions that the institution should identify strategically. As shown in Figure 3, in managing a higher education institution, the 3 main pragmatic questions where answers should be targeted are:

1. **Where we are now and where are we going?** – This should address our current and past performance based on the analysis of internal and external environment analysis to come to an understanding of the current position of the HEI in the staked out education industry based on its capability. This current performance evaluation based on the analysis will determine whether the previously set vision, mission, goals and objectives had been achieved and where we will be going based on the current resources and capability of the institution.

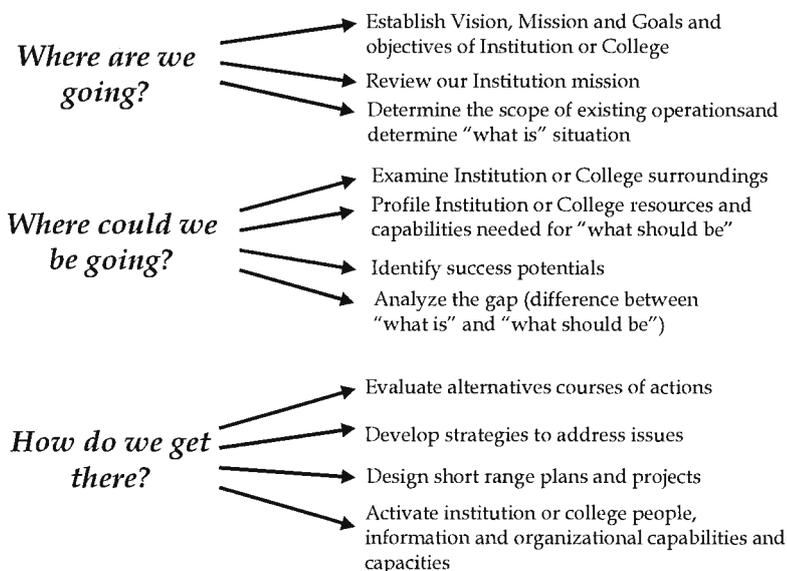


Fig. 3 Pragmatic questions of Strategic Management

Source: Adapted from Teay Shawyun, (2007), *A Primer on Strategic Organization Analysis and Planning Model*, Assumption University Digital Press, Bangkok, 2007

2. **Where do we want to go or where we could be going?** – This question should address where the institution want to stake out a future position in the education industry and what product or service offerings and stakeholder groups that the institution intends to compete in. This would be based on the internal and external analysis to determine what is deficient or what is needed in the existing capabilities or need to be created to achieve that future staked out position. The main issues to be addressed here would be:
 - ⊕ Educational Product and service offering market positions to be staked out?
 - ⊕ Buyers' educational and service needs and groups to serve?
 - ⊕ Education Outcomes to achieve through the educational product and service offerings?

3. **How do we get there?** – This will address the resources and capabilities that the institution needs to create or build to execute its selected strategies to achieve the staked out position and the outcomes that it intends to achieve. It also addresses the issue of what to do and how to do it in terms of the implementation of the strategies selected. It goes into the realms of building a capable and competitive organization in the education industry through capability and capacity building to achieve its mission and goals.

The 3 questions highlight 2 main aspects that should be dealt strategically. In moving forward into the future, the HEI is aiming at a position that it intends to stake out and achieve in the future. In its strategic intent, it must determine what position that it can maintain and sustain and that it can perform better relative to other education providers with the same or similar set of product service offerings targeting a group of educational offerings consumer market. This would be dependent on its ability to compete and perform based on its existing competency or to develop a new set of capabilities that the HEI can leverage to perform better and achieve a greater share of the cream of the market. This would inevitably means that the institution needs a fully understanding of its internal operating environment and its external market environment.

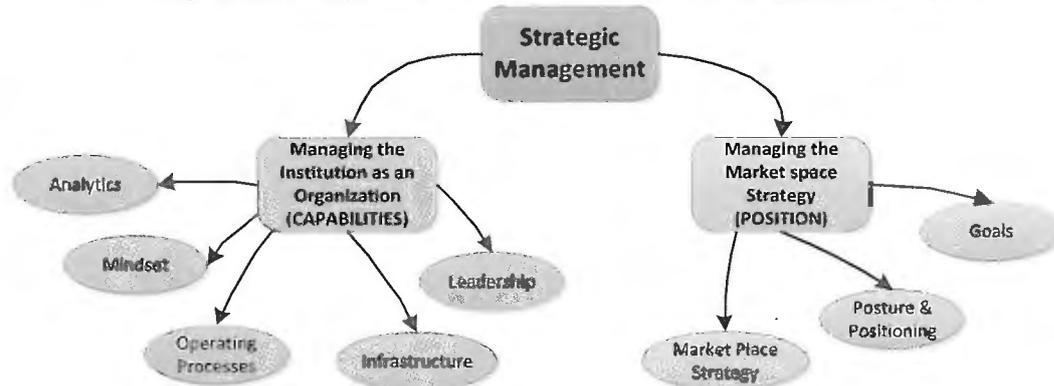
In basic management terminology, the institution must conduct a “situation analysis” of its internal and external environments impacting its present and future position. Based on this analysis, it then plans and formulates its strategies or action to perform and achieve its envisioned position in the future. With the strategies formulated, it must action on the strategies through its implementation of the strategic plan.

2.2 An Integrated Model of Strategic Management for HEI

In seeking an answer to the understanding of its external market environment, and to fully understand the institution's internal operating environment, strategic management would mean that a HEI must both manage its organizational capability and capacity that needs to be managed and created to achieve its marketplace strategy that would lead to its position performance in the

market place. As shown in Figure 4, strategic management in a higher education institution as an organization calls for:

Fig. 4 An Integrated Model of Strategic Management for HEI



Source : Adapted from Liam Fahey , (1994), "Strategic Management : Today's most important Business Challenge", *The Portable MBA (1994)*

2.2.1 Managing the Marketplace strategy set: This understanding is done through an appraisal of the Institution's Competitive Position by:

- ⊕ Reviewing the institution's mission, competitive niche, and significant changes facing the education industry that has an impact on the institution's posture and positioning.
- ⊕ Understanding where the institution has been (its past position), where it is now (its present position), and where it can go (its future position) in the competitive education arena.
- ⊕ Comparing past institution performance with current market happenings and related environmental trends relative to its competitor in the education industry.
- ⊕ Identifying where it can stake out a competitive position in the education industry that its strategic intent is in leveraging its capabilities set to be a key or lead player.

The key questions that need to be asked are:

- ✓ What is the present situation of the institution in terms of its current competitive situation based on its existent vision, mission, goals and strategies relative to its competitors' performance?
- ✓ How effective is the institution competitive approach as indicated by its financial, market and operational key performance indicators?
- ✓ What forces are causing change in the education industry that calls for a need to reshape its educational product and service offerings?
- ✓ What is the condition of the institution resources, its leverage of its competency to achieve its present position?

2.2.2 Managing the Organizational Capabilities set: This understanding is done through designing and developing the Institution's Strategies by:

- ⊕ Analyzing competitive conditions to better understand the validity of the institution's current set of strategies and the set of capabilities and capacities needed and are defined in terms of leadership, infrastructure, mindset, human, information and organizational knowledge and skills (capability) and the amount that is needed (capacity)
- ⊕ Setting the institution's direction through objectives and goals that prepare the management and leaders for approaching the future or needed market conditions
- ⊕ Evaluating the scope of operations in light of developing competitive conditions and defining the consequences of maintaining or changing the institution's set of strategies in terms of growth, stability and limited resources and the capabilities and capacities that are needed.
- ⊕ Identifying the pace of the institution's directions that exploit competitive advantages or improve competitive shortfalls, maintaining a culture of trust, cooperation, and team leadership throughout the enterprise and linking strategic management to operational decision making by establishing timeframes for operational accountabilities within the management team

The key questions that need to be asked are:

- ✓ What is the institution desired market position in the education industry?
- ✓ Does the institution have a clear set of long range goals that is complemented by its medium term and short term goals and objectives?
- ✓ Does the institution have certain deficiencies in its existent capabilities and capacities that needs to be corrected and does the new strategic intent on a new envisioned position needs a new set of capabilities and capacities in terms of its human, information and organization competency set that can be used to leverage its strategic intent in performance and position achievement?
- ✓ Does the institution have an understanding of the impact of market forces and competitive maneuverings on the firm's ability to develop its needed capabilities and capacities to capitalize on the opportunities in the educational industry in its positional and strategic intent?

2.3 “Capabilities” and “Position” perspective of Strategic Management

Strategic Management is based on a few key fundamentals that are generally established upon by most strategic management exponents (David, 2005; Hitt, Ireland, and Hoskisson, 1999; Johnson and Scholes, 2006; Mintzberg, H., Lampel, J., Quinn, J.B. and Ghoshal, S., 2003; Teay, 2007; Thompson and Strickland, 2007; Wheelen and Hunger, 2004) in terms of a time dimension and the achievement of a staked out position through a set of capabilities. As noted above, the

discussion above on Strategic Management in a higher education institution revolves around a few key points of view as follows:

- ✓ **Past, Present and Future point of view:** Strategic Management works on the analytics of understanding what and how it has reached and achieved its present position. It also works on the analytics in understanding and striving towards an envisioned future that it intends to be. As such, Strategic Management has 3 time dimensions, the past, present and future that it must analyze, interpret and understand before deciding on and plotting its future stance and staked out position in the industry.
- ✓ **Capabilities and Position point of view:** Strategic Management works on the principle of competition amongst equals and un-equals for a staked out “position” in the industry. It also works on the principle that the stronger equal will attain a higher share of the market through leveraging its capabilities and competencies set. This would mean that the achievement of an envisioned and staked out position is done through a set of capabilities that the organization has developed and leveraged over time to achieve its present market position and its future envisioned position.

As shown in Fig. 5, the time dimension of the institution performance and its achievement is denoted in 3 time dimensions of:

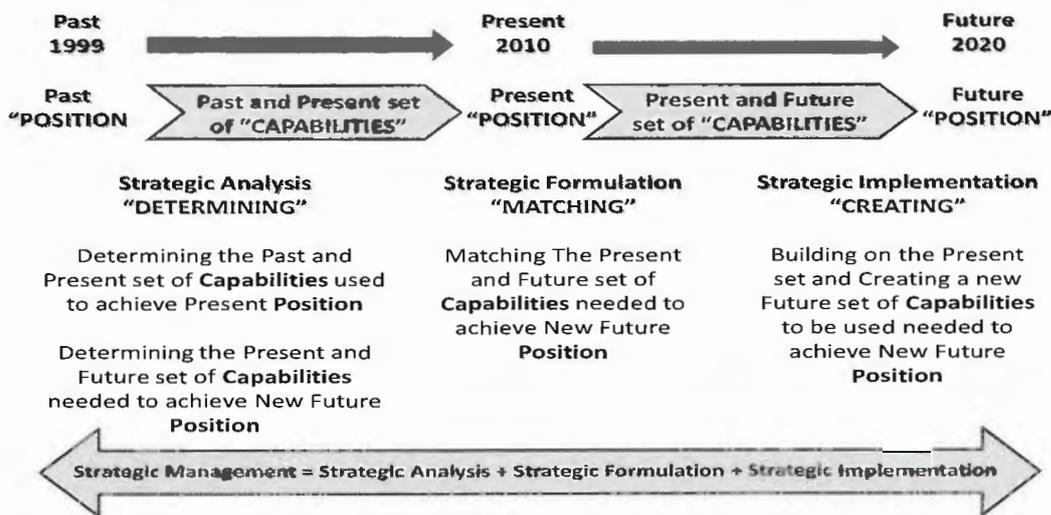
- ✓ **Past to Present timeline of 1999 to 2010:** The imperative here is to determine what past and existing set of capabilities in terms of its key organization resources of its human, information and organizational utilization to create and add value to its educational product and service offerings. The difference is not in having the resources but the degree in capabilities in the utilization of these resources to achieve the present position in 2010 from a past position in 1999.
- ✓ **Present timeline as of 2010:** The institution will need to determine what are its present performance and achievement based on key performance indicators of its financial, market and operational performance and achievements. This set of key performance indicators will define whether its existing set of vision, mission goals and objectives have been achieved and the variance in the achievement and performance will be a key determinant in its future positioning.
- ✓ **Future timeline of 2010 to 2020:** As of 2010, once the institution knows of its present standing in terms of its positioning, it will need to determine what would be the future position that it intends to stake out in 2020. This would call for a review of its existing vision, mission and goals for a renewed or repositioned set

of vision, mission and goals based on the understanding of the new trends and changes in the future environment. This would also call for the identification of a new set of capabilities to achieve this new position in 2010.

As also shown in Fig. 5, the “capabilities” and “position” dimensions of strategic management are:

- ✓ **Capabilities dimension:** It is a widely accepted notion that in order to achieve certain aspirations or performance, it is based on a set of “capabilities” that underscore the knowledge, skills and values or the

Fig. 5: “Capabilities” and “Position” perspectives of Strategic Management



“competency set” that brings about performance as opposed to a “status quo” or “mother luck” conception. These aspirations represent its future envisioned position that it intends to stake out in the education competitive arena. The degree of performance or achievement in this highly competitive arena is contingent on the level of capabilities and capacities that the institution and its human talent have in the utilization of the resources and processes to create and deliver on educational value. Inevitably the analytics of the capabilities leads to the determination of the internal analysis of the institution as the human, information and organizational resources and its utilization is internal of the institution. This inexorably means that the analytics of its internal environment will lead to the identification of the “Strengths” and “Weakness” of the institution in the degree in its competencies in the utilization of the resources rather than in the ownership of the resources. A full understanding of its capabilities is the key to achieving its position.

- ✓ **Position dimension:** It is also a widely accepted notion that the human survival instinct is geared towards a further improvement of its present standing to aspire to a higher level standing. The institution, which is an organizational entity, is no different from the human entity in her strive towards a higher and better desired ambition from its present positioning. But in its journey towards these higher ordinates of aspirations, it needs to understand its external environment that has an impact on its future beings and future standing in its intended position to be staked out. A full understanding of these external environmental factors leads to the identification of the “Opportunities” and “Threats” that can affect its strategic intent.

2.4 Developing the Basic Strategic Plan

In developing the strategic plan based on the “capability” and “position” dimension above, one would need to define the vision and mission statements that also include the values system enshrined in the beliefs of the institution as an entity.

2.4.1 Writing the Vision Statement: Write the vision statement by answering the question "What do you hope for your university, program, school and students and stakeholders?" Ideally, it should be written in a compelling, inspirational fashion.

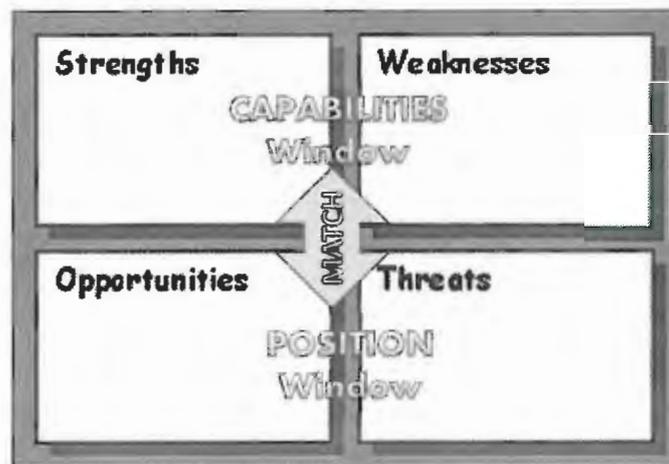
2.4.2 Writing the Mission Statement: Write a concise description of the purpose of your university, program, and school. Answer the question: "Why does our university, program, school exist?" When answering this question, include the nature of your educational products and the groups of students and stakeholders who buy or are affected by your educational products and services. The mission statement should provide continued direction and focus to your plans and operation in your university, school and program.

2.4.3 Writing the Values Statement: Write down the important values from which you want your university, school, program to operate. The values statement depicts the priorities in how the university, school, program carries out activities with stakeholders.

2.4.4 Conduct an External Analysis: Write down your thoughts from an external analysis. An external analysis looks at societal, technological, political, and economic trends effecting the school or program, e.g., trends in the economy, recent or pending legislation, demographic trends, rate of access to trained labor, and competition. In your external analysis, don't forget to look at stakeholders' impressions of the school or program, including bankers', students', stakeholders', community leaders', employment market, parents', etc.

2.4.5 Conduct an Internal Analysis (SWOT): Write down your thoughts from your internal analysis. Write down the major strengths and weaknesses of your school or program. Write down the major threats and opportunities regarding your school or program. Consider trends affecting the university, school, program, e.g., strength of program, reputation of the school or program, expertise of faculty, facilities, strength of finances, strength of administrative offices and operations, etc.

Fig. 6: SWOT “Capabilities” and “Position” Matrix



As shown in Fig. 6, the analytics of the internal and external environmental factors will result in the traditional SWOT matrix which in reality the “SW” represents the “Capabilities dimension” of the institution, and the “OT” represents the “Position Dimension” of the institution. In the formulation of the strategy, and as noted above, the performance and achievement of a certain envisioned future position is based on a set of capabilities to achieve that position. This inevitably means that the envisioned position must be matched to the capabilities as shown in Fig. 6, and in the implementation of the strategies, the capabilities dimension must be built or created to achieve the position dimension.

2.5 *Identifying the Strategic Issues*

Write down the major immediate and near-term issues that your institution, school or program must address. New schools or programs, in particular, are often better off to first look at the major obstacles or issues that it faces, and next identify the more forward-looking, developmental goals to accomplish over the next few years. For example, current issues might be that student admission rate is dropping, there is no research and development to generate new educational products, faculty turnover rate is too high, etc. Developmental goals for new schools or programs might be, for example, build an academic board, do a strategic plan, do a market analysis to build a new educational product, hire employees, etc. To identify the key issues identified from your strategic analyses, consider the following guidelines:

- i. From considering the effects of weaknesses and threats that you identified, what are the major issues that you see? List as many as you can. Consider issues over the term of your strategic plan, but look very closely at the next year especially. Many schools or programs have stumbled badly because they ended up "falling over their feet" while being focused much too far down the road.
- ii. Consider each of issues. Ask whether it's "important – that is its IMPACT on the school or program or how it affects the school or program" and "occurrence – that is its probability of happening because if it does not happen, there will be no impact" and its "urgency – that normally defines whether it needs to be dealt with in the short term, medium term or long term. Often, issues seem very important but its occurrence is negligible when they are only urgent, for example, changing a flat tire is an urgent issue -- but you would never put "changing a tire" in your strategic plan. Attend only to the important issues and not the urgent issues.
- iii. Deal with issues that you can do something about. Issues that are too narrow do not warrant planning and issues that are too broad will bog you down.
- iv. Issues should be clearly articulated so that someone from outside of the school or program can read the description and understand the nature of the issue.

In essence, A key strategic issue is a:

- Future event or trend that may have a significant impact on the university, school or program (e.g., deregulation of an academic industry, signing the AFTA trade agreement or various FTA) and that should be closely monitored

- Decision the institution is considering making that will have a strategic and dramatic impact on the university, school or program (e.g., merging with another university, school or program, changing its strategy, focusing on international operations)

2.6 A Sample Strategic Plan

Foremost, the HEI and its strategic plan must define the following:

- **Vision** – The vision will define “**what we WANT to be**”, a dream that the academic or administrative units posit themselves and would like to achieve that defines a future POSITION that the academic or administrative units want to be.
- **Mission** – The mission will define “**what we CAN be**”, that also defines “**why the organization exists**”, and in order to achieve the dream or position that it wants, it needs to define a set of CAPABILITIES of what it can do to achieve that position.
- **Goals** – Goals are specific accomplishments that will define in broad and general terms of “**what we want to achieve and can achieve**”. This represents the definition of a set of broad achievable targets that will state the achievement of its vision and mission to reach that position that it intends to stake out.
- **Objectives** – Objectives are specific accomplishments that are usually "milestones" along the way designed to measure the achievement of the goal and mission when implementing the strategies. The objectives will define the measurable achievements in terms of the definition of “**what are the measures of the achievements**” which defines its measures and targets that are challenging, achievable, and measurable and with a set time frame. **Objectives are the end results of planned project or activity**. It must be SMARTER (Specific, Measurable, Acceptable, Realistic, Time frame, Extending, Rewarding).

The 5-Year or 10-Year Strategic Plan must find an answer to the following questions:

- i. Where are we now (our current POSITION)?
- ii. What do we have to work with (our current CAPABILITY and COMPETENCY)?
- iii. Where do we want to be in the future (our new POSITION)?
- iv. How do we get there (our new CAPABILITY and COMPETENCY needed to achieve the new POSITION)?
- v. Action planning typically includes deciding who is going to do what and by when and in what order for the academic or administrative unit to reach its strategic goals. The design and implementation of the action planning depend on

the nature and needs of the academic or administrative unit. Action planning may seem detailed and tedious compared to strategic planning which often seem creative in nature. Therefore, action planning is too often ignored, leaving the results of earlier stages of planning much as “castles in the air” -- useless philosophical statements with no grounding in the day-to-day realities of the academic or administrative unit as the **OYPB which is the action plans are the day-to-day projects and activities and that supports and achieves the key activities of the strategic plan.** *The action plan normally answers the key question “How do we get there (our new CAPABILITY and COMPETENCY needed to achieve the new POSITION)?*

2.7 Developing the OYPB (One-Year-Plan and Budget)

Actions plans or the OYPB specify the actions needed to address each of the top academic or administrative units’ issues and to reach each of the associated goals, who will complete each action and according to what timeline.

2.7.1 Conduct Action Planning (project objectives, responsibilities and timelines): For each strategy identified in the 5-Year or 10-years strategic plan, write down the SMARTER (Specific, Measurable, Acceptable, Realistic, Time frame, Extending, Rewarding) project objectives that must be achieved while implementing the strategy, when the project objectives should be completed and by whom and how are they to be measured and assessed -- especially over the next academic year.

2.7.2 Develop an Operating Budget in the OYPB (One-Year-Plan and Budget): List the resources you will need to achieve the goals in the strategic plan and the projects identified in the OYPB (One-Year-Plan and Budget) and what it will cost to obtain and use the resources for each of the project identified. You don't have to be exactly accurate (as it is a close approximation of the utilization of resources)--besides, you may end up changing your final project budget as you give more attention to the educational product design and planning in the actual project proposal when you actually start to develop or formulate it. You should do a budget for each of the project for each of the years included in the span of time covered by your strategic plan -- but give particular attention to the immediate first year of the time span which is the OYPB that defines the projects that needs to be developed and implemented and the budget needed to achieve the goals and mission of the academic or administrative units.

Look at each of your educational product-related or process or work goals. Think about how much revenue the educational product or process or work might generate. Next, think about the

expenses to produce, sell and support the educational product, process or work such as human resources, facilities, equipment, special materials, marketing and promotions, etc. (Note that this action planning or the OYPB often provides strong input to the overall budget. It will likely convert your operating budget to a set of project budgets).

In the OYPB there are many different kinds of effects we might seek and that we might create as follows:

- i. What are you trying to achieve?
- ii. What are you trying to preserve?
- iii. What are you trying to avoid?
- iv. What are you trying to eliminate?

This linkage above can be recast into the four questions as follows:

- i. What do you want that you don't have? (Achieve)
- ii. What do you want that you already have? (Preserve)
- iii. What don't you have that you don't want? (Avoid)
- iv. What do you have now that you don't want? (Eliminate)

2.7.3 Specifications of the OYPB: As the action plan for academic and administrative units identifies what needs to be done and how it is to be done that are normally defined or created as the projects to be implemented. The project should identify each major function, each administrator and each faculty or staff, based on the following key education areas as follows:

- i. Mission and Goal of the university, school or program
- ii. Teaching and Learning
- iii. Student Services and Development
- iv. Research
- v. Faculty and Staff Development
- vi. Academic Services
- vii. Preservation of Art and Culture
- viii. Administration and Management covering governance and learning resources and facilities
- ix. Finance and Budget
- x. Quality Assurance System

2.7.4 Each of the projects needs to specify:

- i. *The goal(s) that are to be accomplished*
- ii. *How each goal contributes to the academic and administrative units' overall strategic goals*
- iii. *What specific results (or objectives) must be accomplished that, in total, reach the goal of the academic and administrative units?*
- iv. *How those results will be achieved?*
- v. *When the results will be achieved (or timelines for each objective)?*

2.8 Alignment of School and University VMGO and the Projects and Budget

It is important that the VMGO (Vision, Mission, Goals and Objectives) of the academic or administrative units be aligned with that of the university. The alignment is an imperative as what the academic or administrative units do in its mission, the definition of the academic or administrative units goals, SMARTER objectives and its strategies and projects and budget, they should be aligned to support and achieve the basic mission and philosophy of the University.

2.8.1 Sample Mission of HEI

HEI exists for the main purpose of serving the nation by providing scientific and humanistic knowledge, particularly in business education and management science, through research and interdisciplinary approaches. To this end, it aims at forming intellectually competent graduates who

- *are morally sound, committed to action justly, and open to further growth;*
- *appreciate freedom of expression, imbued with ethical attitudes and ideologies through a carefully integrated curriculum of Ethics, Science, Languages and Business Management; achieve academic excellence through hard work, critical and positive thinking, and effective decision-making.*

2.8.2 Sample Strategic Goals of Theme 2 for Creating and Strengthening Quality Teaching and Learning (P1 – Phase 1 and P2 – Phase 2)

It should be noted that in order to fulfill the HEI mission in forming intellectually competent graduates, a key process is the teaching – learning processes, and to achieve this theme, the strategic goals for this thematic strand of creating and strengthening quality teaching and learning must be identified. These are the overarching strategic goals for the HEI of which they must be translated into the school's mission and strategic goals. The strategic goals, its initiatives and metrics are defined in Table 1, with its corresponding measurement of its annual performance shown in Table 2. The strategic goals for the HEI are:

P1 2.1 HEI will create a positive learning environment that enables students to achieve their full academic potential and to cultivate their personal development.

P1 2.2 HEI will create a curriculum meeting the highest standards of excellence across the University.

P1 2.3 HEI will develop a system for academic advising that meets the needs of the students and leads to academic success.

P2 2.4 HEI's program develops strong students' competency of knowledge and skills and effectively prepare students as competent and ethical citizens.

P2 2.5 HEI will continually improve and innovate on the quality of our program offerings and their delivery and link it to the National Qualification Framework at all levels.

P2 2.6 HEI will include more international aspects in its curriculum context and content.

2.8.3 Sample Mission of the School

*The School of A exists for the main purpose of serving the society with the highest commitment through providing **high quality educational process** with the **best academic resources**, using student-centered approach, advanced information technology and innovations to educate qualified graduates, create body of knowledge through research, and provides academic services to the society.*

2.8.4 Sample Goals and objectives of the School for Teaching and Learning

The university strategic goal is: P1 2.2 HEI will create a curriculum meeting the highest standards of excellence across the University. (representing the envisioned position of HEI). The mission of the school is a **high quality educational process** calls for actions by the school to identify its goals, objectives, strategies and action plan to support a high quality curriculum that leads to the highest standards of excellence. The strategic goals, its sub-goals, SMARTER objectives, strategies and action plans for the school that represent the capabilities to be created are discussed in the examples below:

Strategic Goal 2.1: *Providing high quality educational process*

Goal 2.1: **The teaching-learning processes must be student-centered**

SMARTER Objectives: (these represent the KPI measurements of performance in the quality management)

Objective 2.1.1 60% of context of the school's curriculum and delivery process must be student-centered by 2010

Objective 2.1.2 30% of the school's faculty must be trained in student-centered pedagogy by 2009 and achieve a 100% rate by 2012.

Strategy:

- Strategy 2.1.1** To set up an academic task force to lay down the criteria and standards of a student-centered curriculum and delivery process, to review and ensure that the curriculum and the delivery conforms to the criteria and standards.
- Strategy 2.1.2** To identify faculty who needs training in student-centered approach and develop workshops to train the faculty.

Projects for “The teaching-learning processes must be student-centered”

Project 2.1.1 Details of the project and budget to be used to set up the academic task force to develop the criteria and standards.

Project 2.1.1: (Project title: Establishment of task force to review curriculum)

Goal: (Strategic Goal # 2.1 to be achieved)

Objective: (Strategic Objective # 2.1.1 to be achieved)

Strategy: (Actions and activities supporting Strategy # 2.1.1 used)

Project details: (Details and budget)

Project 2.1.2 Details of the project and budget to be used for the training and workshops to train the faculty in the student-centered curriculum and delivery.

Project 2.1.2: (Project Title: Student-centered curriculum and delivery workshops for faculty)

Goal: (Strategic Goal # 2.1 to be achieved)

Objective: (Strategic Objective # 2.1.2 to be achieved)

Strategy: (Actions and activities supporting Strategy #2.1.2 used)

Project details: (Details and budget)

Goal 2.2 *The teaching-learning process must develop qualified graduates*

Objective 2.2.1 The school’s Student Competency and Effectiveness Index must achieve a 10 % increase annually

Objective 2.2.2 30% of the school’s curriculum should use the Student Competency and Effectiveness Index as the minimum standard by 2009 and achieve a 100% rate by 2012 at all levels of the curriculum

Strategy:

Strategy 2.2.1 To set up an academic task force to lay down the criteria and standards to ensure that the Student Competency and Effectiveness Index is used as the minimum standard in the school and in each of the program and subject.

Project 2.2.1: (Project Title: Academic task force to define criteria and standards of Student Competency and Effectiveness Index)

Goal: (Strategic Goal # 2.2 to be achieved)

Objective: (Strategic Objective # 2.2.2 to be achieved)

Strategy: (Actions and activities supporting Strategy # 2.2.1 used)

Project details: (Details and budget)

Strategy 2.2.2 To ensure the Student Competency and Effectiveness Index is measured in the school and in each of the program and subject.

Project 2.2.2: (Project Title: Measurement of Student Competency and Effectiveness Index)

Goal: (Strategic Goal # 2.2 to be achieved)

Objective: (Strategic Objective # 2.2.1 and 2.2.2 to be achieved)

Strategy: (Actions and activities supporting Strategy # 2.2.2 used)

Project details: (Details and budget)

Conclusion

In summary, as noted by Andersen *et al.* (2006), the quality, information and planning management, or all aspects of the HEI commitment of educational value to society must be approached from a holistic perspective with a set of appropriate plethora of tools and techniques depending on the situational needs. Bringing about a cross marriage of the education management through quality management and strategic management, with the IS/IT management as the enabler for quality management and planning management is the hall mark for successful quality higher education. Moving from the macro organizational strategic needs to the micro level operational processes needs a new mind-set that calls for the capability and capacity of the individual and organization. It can thus be said that strategic management is the “*determination, matching and creation of the capabilities of the institution to achieve a future envisioned position based on the timeline from the past to the present and into the future*”. This would mean that Strategic Management as expounded in Fig. 5 is:

Strategic Management = Strategic Analysis + Strategic Formulation + Strategic Implementation

- ✓ **Strategic Analysis:** *DETERMINING* the past and present set of **CAPABILITIES** that is used to achieve the present position from the timeline 1999 to 2010 to reach its present **POSITION** in 2010.
- ✓ **Strategic Formulation:** *MATCHING* the present set and a future set of **CAPABILITIES** that is needed to achieve a future envisioned position from the timeline 2010 to 2020 to a new envisioned **POSITION** in 2010.
- ✓ **Strategic Implementation:** *CREATING* the new set of **CAPABILITIES** that is needed to achieve its new envisioned **POSITION** in 2020 through the timeline 2010 to 2020.

Basically, in understanding and applying strategic management to the HEI to bring about quality education and for strategic management to be successful, the strategic plan developed must be aligned with the units' strategic plan. It must be actioned on by aligning the strategic goals and converting them into the units' actionable goals, objectives that must be set and measured on an annual basis to ensure that the strategies are implemented, checked by its measurements and acted upon.

In conclusion, it is hoped that this paper achieves its objective in de-mystifying the intricacies of quality management and strategic management via the strategic planning mechanism and the alignment and linkage through the actionable annual operation plan and budget that defines the key performance indicators quality measurement and achievements.

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