Good morning and a very warm welcome to this timely and important workshop.

Since the establishment of the merged Unisa in January 2004, strategy and planning at the new institution have been marked by three recurring and enduring characteristics and/or dynamics that have simultaneously ensured a visionary strategy and planning regime, while posing seemingly intractable challenges. I thought I would share these with you this morning, firstly because we have new faces in our extended management and secondly, because it is critical to have a shared understanding of where we have come from and the mistakes we have made, so that we can move forward from a common understanding and with common purpose.
The first of these dynamics, or lets us say, characteristic, is Innovation. This university’s executive management has never been afraid to dream boldly and with foresight, and to throw “heart and soul” into making it happen. In fact, for a long time Unisa’s merger has been regarded as the most successful in higher education: not because of our resources or our infrastructure, but because we had an extended management who understood the transforming higher education environment, the role that Unisa had to fulfil in the new democratic dispensation, the need for innovative and creative thought and practice in this unchartered territory, and for men and women who were able to confront change head on, with common purpose. We crafted a vision and strategy that were soon deeply embedded in the university’s psyche and practice, and introduced a planning regime that weathered many storms in the ensuing years, while maturing steadily and accretively. We worked as a tight team, conscious of Unisa’s proud history and the chapter that we were adding to those annals. We made it happen with a minimum of fuss and a huge amount of energy and commitment.

Colleagues, the ability to face challenges head on and to be innovative in our response where required, is I believe, one of Unisa’s greatest strengths. I would like to believe it is coded into our Unisa DNA. However, this approach has its challenges, and the second point I would like to raise is that we have consistently misjudged our capabilities. Be it over-optimism or over-confidence, or an inadequate evaluation of our capabilities and capacities, we have consistently bitten off more than we can chew – in fact I can say without fear of contradiction, and Ms Griesel will back me up – that I cannot remember a single year when we have come near to completing or finalising all of our undertakings in the Institutional Operational Plan (IOP) [now APP]. In the early years (perhaps understandably given the urgency of transformation) we sometimes had over 100 “actions” in our IOP and every year we added to them (in fact if I am not mistaken one year we even had 186 actions!). Every year the same non-completion complaint came up and despite the fact that we tried reducing the number of strategic goals, targets and actions, we seemed incapable of getting off that treadmill, or moving closer to full implementation. This has not changed even today. We for example continue to place an inordinate amount of pressure on ourselves to deliver the undeliverable while making ourselves accountable to Council for it. That must change. We simply have to be more realistic in our selection of actions for the Compacts and APP, and I am convinced that, that will only happen when we are appropriately informed. That is the purpose of this workshop.
The third dynamic, which is perhaps our most significant challenge, emanating directly from the second is that of implementation - or more specifically, the efficient management of the multiple and complex interdependencies that are needed in an institution the size of Unisa to ensure task completion and thus, the implementation of the APP. We have never got that right despite very valiant efforts and initiatives including for example, dedicated committees, conversation circles, crucial conversations and so on. A number of factors have contributed to this state of affairs, perhaps the most glaring of which is a lack of coordination at the strategic level, as well what I can only term a competitive spirit amongst management in particular, which weakens buy-in and cooperation across portfolios. It is a simple fact that if you put yourself and your portfolio first, rather than the broader interests of the university, and by extension, South African Higher Education, we will never succeed in implementing fully, our operational plan, or as it is now called, our Annual Performance Plan.

Having raised these three key dynamics, I now move to my final points.

Just as we faced a new environment back in 2005, so we face one now. But there are many key differences that have to be taken into consideration.

In the institutional context we have lost the majority of all those who were with us back then. Now, that is both positive and negative. Positive in that we need to acknowledge that their time was then and that it is now our time. They did that which they could and was within reach during their time. However, now that they are no longer with us and they are not facing the current challenges that we are dealing with, let us focus on our work and its associated challenges forthright. Let us celebrate an opportunity presented to us by the all the leaders that we have appointed and move forward with “new blood” which brings with it new ideas, energy and enthusiasm. But negative in the sense that some of us misunderstand an injection of new blood as leading to a ‘blind’ loss of institutional memory without any appreciation that organisations require this shake-up if they are to progress into uncharted territories ie in terms of their success. What we now need is to ensure that our new blood as well as all of members of senior management are assisted with swift immersion on to the rhythms, practices and process of the university, not to mention the institutional culture and the cut-and-thrust of extended management engagement. Failure to achieve this thoroughly and in good time presents the risk of the duplication of efforts, additional layers of management, and staggered levels of institutional understanding and experience, resulting in a lack of coordination and teamwork, to name but a few.
Our regulatory environment has also changed quite fundamentally, especially when it comes to the new reporting requirements for higher education institutions. Whereas efficiency and effectiveness were the pervasive requirements for HEIs post-merger, the notion of accountability and performance has gradually taken hold, to the extent that for the first time in history, higher education institutions are now required to account for their performance and are audited externally on the evidence that they provide in support of their claims. Quite frankly, arguments around the corporatisation of the university appear to be futile. For all intents and purposes universities are now accountable for their performance and their undertakings to the Minister.

In the first few years post-merger we tried to the best of our ability to measure progress by asking about the percentage of completion on a project, but we had no way of measuring accurately what a 70% completion actually meant (we learnt to our detriment that it sometimes mean 30%). When we added budgets to that calculation we moved a step forward, because we could use budget-spend as a monitoring criteria and device. Still later risk was introduced as a supplementary ranking criterion for actions. In fact there have been a number of such introductions to the planning process, which over time have tightened up our monitoring and evaluation processes at Unisa. However, accountability remains a challenge (except through the IPMS process).

All of that changed with the new reporting regulations. Auditable evidence has become the watchword in the actions’ project management. 70% completion means a 0% (zero) task completion in auditing parlance and that is the message that will be conveyed in the audit report. The only way in which any higher education institution can ensure that it meets its undertakings to Council and the Minster in this new environment, is to ensure that it is able to monitor, evaluate and measure progress on deliverables, that it is able to hold responsible persons accountable for that delivery and that it is able to provide auditable evidence. And that can only happen through integrated planning, which includes the participation of all affected stakeholders, and incorporates all financial, social and environmental costs and benefits in forging an APP that is realistic, sustainable, deliverable and measurable.

A further thought that I would like to share, is that as part of the evaluation of our context, we factor in the “business-unusual” dynamics which characterise and are shaping so much of what we are doing in our institutions right now. How is, and how will (and to what extent) the socio-political disruptions, and damage impact on our planning and the achievement of our APPs now, and going forward? Has our
scenario and risk planning included this? Ask yourselves how our risk register and our planning actions would be affected if we had just witnessed the destruction of our ZK Mathews Hall. For UJ this is no longer a risk. It is a reality. We have to be prepared colleagues, and this is where integrated planning comes to the fore.

And it is to this task that we turn today. I am assured that our executive management will have a thorough immersion into the notion and theories around integrated planning, especially at Unisa, as well as the role of leadership and management in that process. I look forward to seeing the changes that your deliberate induction into integrated planning will bring to Unisa.

Let me leave you with a final thought colleagues. It is my considered opinion that the lack of implementation at its most basic level can be ascribed to a lack of committed coordination amongst the various portfolios, in regard to interdependencies. As you consider the model of integrated planning for Unisa, it would serve us well to also consider at a very practical level, as part of that process, an overarching project plan that encompasses all of the interdependencies, sets out timelines for meetings and project completion, includes budget spend and that allows for ongoing monitoring, evaluation and measurement. I have by no means included all of the variables in that project plan, but it would be useful to have at our disposal an instrument that is able to guide the implementation process in an integrated, inclusive and measurable manner.

I look forward to the day when we are able to report to Council and the Minister, that we have met all of our undertakings in our compacts with them.

I thank you.