

Practical application of the Megapanning in the transformation of a región thru collaboration of universities, governments and enterprises.

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Abstract

Thru this article, the author explains his personal relation with Dr. Roger Kaufman and shows how thru the use of Dr. Kaufman Theory and Methodology was possible elaborate an Strategic Plan for the South of Sonora Region, in Mexico, which has been recognized by the Organization for Economic Cooperation and Development as a good international reference to show how can the Higher Education Institutions can contribute for the city and regional development.

My professional relation with Dr. Roger Kaufman and joint projects.

My first contact:

In 1991 in the midst of a political struggle among two groups that were interested in running the university, an independent group of professors decided to ask the people from the community of Ciudad Obregon, Sonora thru a Manifiesto named "The value of ITSON model" for their support, in order to maintain the strong linkage that since it was born had the university with society (The Sonora Technological Institute was created as a High School by the Lions Club in 1955).

Once that people of the community, responded positively to the call given by the university thru the Manifiesto, The president of the university at that time Dr. Oscar Russo Vogel called me, as one of the leaders of the independent movement and told me "Now, you must help me to give life to the ideas that are in the text". In few words the motto of our institution resumes the text "Educate to transcend"

In order to make things happen, in june of 1992, was created the Social and Humanities academic direction and I was put as a director. My first action as head of the área, was to gather the people that was in charge of the academic departments and programs and ask them for their support in order to ask specialists in Education to help us answering two questions:

¿Which are the challenges that the universities are facing in a new age of globalization? and given that ¿how the universities should be organized in order to respond to those challenges?

To respond to those questions, the university made a call to specialized higher education institutions in order to make their proposals. The idea was that the proposals must include one educative program for each question, the programs were exclusively for professors of ITSON, the idea was that once they had the knowlege, they were going to be the base for the curricular transformation. The University that won the contract was the Universty of Las Americas in Puebla

(UDLA) and Dr. Juan Manuel Garibay, the Pedagogy Director of (UDLA) was the coordinator.

The first academic program was given at ITSON in January of 1993 and the first class was Strategic Planning for Higher Education and the book that was used as a text for the course was "Mapping Strategic Success" of Roger Kaufman. Given the interest of the professors to get more knowledge about the ideas of the author, Dr. Kaufman was invited to ITSON to attend the Second International Congress in Strategic Direction and gave a conference for the students and general public and another one for ITSON professors and management. I had the opportunity to get to know Roger and Jan and I was really impressed by their commitment for society as a primary client for any organization.

My second contact

In April of 2004 as president of the Sonora Technological Institute, I was invited by Dr. Roger Kaufman to participate with Dra. Ingrid Guerra Lopez in the annual meeting of International Society for the Performance Improvement (ISPI) with the conference named "Eleven years of megaplanning at ITSON". After the conference some academics such as Dr. Dale Brethower and Dr. Mariano Bernardez ask me about the follow up, then I ask Dr. Kaufman about his thoughts and he told me that it should be good if we create an Institute for the Performance Improvement to follow up all the job that had been done up to that date and he was going to assemble a proposal and send it to me.

By April of 2005, the Performance Improvement Institute was created at ITSON under the direction of Dr. Mariano Bernardez and Dr. Roger Kaufman who was in charge of gathering the academic group of professors that supported the research, the teaching and the publishing. Then in 2006 started the Doctoral Program in Social and Organizational Performance Improvement. So from 2005 until 2010 I had had a very close working relation with Dr. Kaufman. Under the Institute were created four Innovation Ecosystems: Biotechnology and Agribusiness, Software and Logistics, Ecotourism and Sustainable Development, Education and Health. In each Ecosystem were 3 Strategic Initiatives.

As academic director of the Institute, he was always coaching professors and tutoring students making sure that the doctoral and master program and the projects that were executed by the students and oriented by professors, all align to organizational results and societal impacts. In that sense, in 2008, a strategic plan for the development of the south of Sonora was developed with the participation of the majors of the municipalities of Cajeme, Navojoa and Guaymas in Sonora, Mexico together with businessmen and members of the civil society. In 2010, Ciudad Obregon was chosen for the third EuroLatinoamerican Forum for the Development based on Innovation and in 2012, the work that ITSON did to support city and regional development, was recognized by the Organization for Economic Cooperation and Development (OCDE).

In 2015, I invited Roger to give a conference to UNILIDER, which is a very prestigious private university based in Hermosillo, Sonora to speak about the challenges of the transformation of a city. Also he was invited to know the Project of transformation of the General Direction of Centers for Work Development, that is a national organization which has generated an strategy of national regionalization and also, he had a meeting with the directors of Cementos Mexicanos which is a Mexican internationally recognized company who were interested in the way that they should approach business nowadays. Without a doubt, the impact of Roger's message was very positive and convincing, given that more and more organizations are looking to society as it's primary client.

Roger's contribution to social science and the profession

For my personal point of view, Roger's contribution moves in three different aspects: one in his visión, the second is in his methodology and the third is in his commitment to results.

On his visión

The first time that I read about the approach to social good and how anyone that does strategic planning must define the gaps starting with defining specific indicators related with: survival, health, selfsufficiency and wellbeing, I thought that it was just a conceptual reference, but I was impressed when I heard Rpgger speaking and defending the point that is not only posible, but is also required for each one to commit with that visión if any one wants prosperity. That is easy to understand once he explains the consequence of not doing so. That means, if your environment is society and society doesn't grow, then your gainnings are substractions from someone else. On the other hand if as a consequence of your action society grows, then you will grow further.

For our university ITSON, the visión approved by the institutional directive council in 2006 was defined in the followig terms

"ITSON is part of a society that continually improves the survival, health, selfsufficiency and wellbeing of the population thru the generation of high value products and services that contribute to raise the quality of life of the community".

On his methodology

He has two different tools to help for align organizations to societal good. One is the Organizational Elements Model (OEM) and the other is the six critical factors for success.

The OEM permitts any manager to define and link in a very practical way the concept with the context.

That means that you start in the mega defining specific targets at the level of economy and society that will serve as a reference to define the gaps and objectives during the process of the strategic planning,

In the case of ITSON, the indicators were defined in terms of: economic growth, employment, income, health, poverty, security, education and culture. In order to achieve those goals ITSON build international networks and local, regional and national alliances thru economic and social ecosystems in order to increase it's potential to achieve those consequences.

From there you move to macro level with specific markets and clients were you define the results that you are committed to obtain and specify the variables, indicators and parameters that you will use in order to measure if you have accomplish or not your goal.

To move in the macro level, ITSON generated 12 strategic initiatives, three for each Ecosystems. Each strategic initiative, starts the tactical planning with the client specification, in such a way that once that you define the desired results, the following stage was to gather the organizations in order to design and develop the tactical plan. At this stage, the collaboration was a critical factor for success.

At the micro level the standards and characteristics are defined for each product and service that will be produced. At this stage, the coordination between the academic and economic and social programs is crucial for the planning of the success of each project. The number of students that participate annually in the different strategic initiative doing social service, thesis and academic practices, were around 3,000.

Without any doubt, Dr. Roger Kaufman contribution is being moved for the effectiveness of the practical applications of his theory and methodology. Fortunately his published and practical work has been recognized by the International Society for Performance Improvement by instituting the Social Impact award as part of their annual recognitions

Other relevant aspects

As a person I must say that he is a remarkable human being and is an example of commitment, responsibility and solidarity. I must also thank Jan his wife whom is also a remarkable person that has contribute to the continual improvement of Roger as a person as a profesional and as a committed citizen.

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