

DYNAMIC VISION-BASED STRATEGIC PLANNING: THE KEY TO MEETING OUR PROMISE TO THE COMMUNITY

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There's a wonderful cartoon that appeared years ago in the *New Yorker Magazine*. As an executive-type is returning from lunch his secretary is giving him his messages: "Sir, the following paradigm shifts occurred while you were out." Those of us in the nonprofit world can relate. Change is pervasive, impacting every aspect of how we do business. And the faster we run, it seems the harder it is to catch up.

Amidst this backdrop we are encouraged to take time out to plan. I've heard more than one board throw up its collective hands and say, "But we don't have time to plan." Some go on to question the value of planning, especially if their experience has been to have limited involvement in the process or little or no follow through on the proscribed actions. Yet, the somewhat trite response to the initial complaint remains a truism. We don't have time NOT to plan. By incorporating around a mission, each of our organizations has made a promise to the community. We are responsible for keeping that promise and doing so in an efficient manner. Without planning the chances of achieving our mission are greatly diminished. The chances of achieving it in an efficient manner are virtually non-existent.

However, few organizations today can afford to commit what used to be up to 18 months and tens of thousands of dollars on a process that all too often resulted in a large onerous document that was frequently outdated by the time the ink was dry. Our challenge is to determine how best to maximize our resources to achieve an outcome that is useful, dynamic and engaging in a setting that is constantly in flux.

I suggest we start with a definition of strategic planning. Personally, I like that of planning guru, J.M. Bryson, author of *Strategic Planning for Public and Nonprofit Organizations* who says it is "merely a way of helping key decision-makers think and act strategically." I like this because it not only leaves the process wide open to the needs and sensibilities of each individual organization it also implies an ongoing rather than a discrete process. While this article suggests a process and specific techniques there is nothing sacred about what is here. I hope that every reader takes Bryson's words to heart and looks at these suggestions as merely a jumping off point for his or her organization.

DRILLING DOWN TO THE CORE COMPONENTS OF THE PLANNING PROCESS

If we are to come up with an effective alternative to the traditional strategic plan we must begin by determining the core components of the planning process – those elements that are essential to our ability to obtain our desired result. And, to come up with these components we must ask

ourselves why planning is valuable in the first place. To me, the answer is that it provides direction to ensure that the organization is efficiently and effectively working toward achievement of its mission in accordance with its commitment to the community. As such I believe that we have to know what that mission is as well as in our mind's eye what the world will look like when we've achieved it. This latter is our vision. There must also be some guiding principles that help us make our decisions in light of our vision. As I'll talk about later, once identified these three factors should remain relatively fixed over the years.

However, while our mission, vision and values should remain constant we also have to recognize that the only true constant in the world is change. To be sure that we are acting most appropriately at any given time requires that we are aware of what the changes are and the potential impact they have on our ability to accomplish what we wish. Taking the current reality and trends into consideration we need to identify specific goals that once met will move us closer to the picture in our mind. Finally, to determine our success we must institute some sort of ongoing evaluation and a process for making changes as it appears necessary or beneficial to do so.

I expect that so far, these components sound like those in any planning manual. It's the approach we take from this point forward that keeps the process cost effective and ensures the result is sufficiently balanced in terms of offering clear direction while allowing for flexibility as conditions change.

MISSION, VISION AND VALUES

Margaret Wheatley in her classic book *Leadership and the New Science* reminds us that all living organisms are self-organizing systems. This means that they are able to process new information and reconfigure themselves in order to deal with the new realities presented, all the while remaining consistent with their own essence or identity because they know their boundaries. The paradox is that, in the words of astrophysicist Erich Jantsch, "the more freedom in self-organization, the more order."

In the nonprofit world the boundaries within which we work are our mission, vision and values. When board and staff have internalized these they can absorb new information and confront unlimited challenges in a myriad of creative ways yet remain always on track, the organization's integrity assured.

This requires that the mission, vision and values be stable over time. They cannot be changing every time a new leadership team comes in or a "strategic planning process" is calendared. As such, significant time and attention must be paid to the development of these critical factors initially. But what a time-, dollar- and energy-saver down the road!

Mission

I have run into a great deal of confusion between the concepts of mission and vision. Simply, your mission is your *raison d'être* – your reason for being.

Since the mission statement is expected on virtually all materials that go out to the public, time should be spent to be sure that it clearly communicates your organization's purpose. It should succinctly explain – in language that is free from organizational jargon – what your organization does, for whom it does it, and how the organization differs from others appearing to address similar needs.

Nonprofit management guru Peter Drucker cautions, “Less is more applies to most mission statements. If they run more than a paragraph, they haven't been thought through.” The idea is that the mission statement reflects the organization's big picture. It should not be too specific because it must remain broad enough that your organization can work with it in different ways as the needs and the climate change. However, because the mission should help drive all organizational decisions, it must be specific enough to provide focus.

A classic example of a mission statement comes from the era of early space exploration. It was the height of the Cold War and the Russians had just launched their first manned spacecraft. American honor was on the line. President Kennedy stated that the United States would be first in space. Short and simple, everyone understood the promise being made to the American people. However, as a good mission statement must be, it was expansive enough to allow the country to undertake a wide variety of space missions for close to 50 years now.

If you don't have a mission statement or you are unsure that it fits the criteria above I would turn to your board as the body responsible for providing direction to the organization. I have found the easiest way to start developing a mission is to ask each director to write out what he or she thinks it is or should be. The results can then be shared in small groups where people have the opportunity to question the underlying intent of each statement. When everyone is comfortable with the ideas on the table the groups can begin discussing the essential points, commonalities and important differences within these statements with the goal of crafting a group statement. Once all the small groups have finished the process of negotiation and come up with a mission statement for the table the process begins again in the full group. The intention here is to identify specific words and concepts that belong in the final mission statement. While you might find it helpful to hire a facilitator to lead you through this process, it is not necessary.

I would share what comes out of the board with other stakeholders for their input. Take your time and get it right. Remember, you are writing a mission statement to last an organizational lifetime, unless like the March of Dimes you are able to fulfill your mission – in their case to eradicate polio – and forge a new one – to end birth defects. Finally, I suggest having a couple of good writers take all the suggestions and draft a “final” statement for board approval.

Vision

Vision is an interpretation of your mission statement. In organizations such as all of ours it paints a picture of how we expect the community to look – how we expect it to be better – once the mission has been achieved. The operative word here is “community.” Vision is not about making the organization more visible or fiscally strong. It is not about building a dream board or adding new programs. These are merely vehicles for impacting the community in accordance with our original promise.

To me, vision and values are the most important tools we have to strategically drive our organizations. Consider how easy it becomes to make the best possible decisions if everyone responsible for making the decisions has the same picture of the desired future in his or her head. In the space example I gave earlier, being first in space could have been interpreted in many ways. Congress might have voted to use funds to build additional space orbiters. NASA might have trained to send spacecraft to each of the planets. Apollo manufacturer Pratt & Whitney might have tried building vehicles capable of carrying a larger crew and more equipment. And with each subsequent space shot the American people might have argued if this proved that we were finally first in space. But the President kept everyone focused on a single future by painting a vivid and exciting picture – America would put a man on the moon by the end of the decade. From that point forward resources were directed at that single, specific and stirring goal. When in 1969

Armstrong first announced “The Eagle has landed,” then put his left foot on the lunar surface, everyone *knew* America’s vision had been realized. To have this kind of impact your vision must be widely shared.

I keep talking about the need for a picture. I mean this very literally. Unfortunately, most board members don’t envision the same future even when an organization has a succinct and carefully constructed vision statement that each can spout. Why? Words can be – and therefore will be – interpreted in many different ways. With a picture everyone is more likely to *see* and internalize the same thing. While there are many approaches to creating an organizational vision, I like to have boards take out art supplies and actually draw the future they hope to realize. Again, I find it effective to begin working in small groups and eventually reconvening the large group to merge pictures until everyone is operating from the same image.

I often recommend that groups laminate their final picture and put it up in the boardroom as a visual reminder of the future to which the board has committed. If a funder has asked for a written plan someone can try putting the vision into words. But, I wouldn’t strive to find the perfect terminology because, again, the vision is not about a statement but rather a compelling image that can be passed on down through the years.

Values

Organizational values, like vision, allow board members to focus their energies in a unified, strategic way. Drawn up to specifically speak to your organization's responsibilities and its philosophy regarding clients and the community – these are not the generic, “we shall be honest and have integrity in our dealings” – they serve as guiding principles for all decisions.

For example, a values list for an organization that deals with domestic violence might include the belief that every person deserves to return to a safe environment at the end of the day. Let's say that the board was presented with two program ideas but could only afford to pursue one of them. The first was launching career training for women that would build skills, self-confidence and ultimately self-sufficiency so that women who are victims of domestic violence can make it on their own outside the abusive relationship. The second was opening an emergency shelter for abused men. Without the value statement above the decision might well be opening the career training program for women because it has an emotional impact that a shelter for men lacks. However, the value statement with its concern for *every person* having the right to *a safe environment at the end of the day* tilts the balance in favor of investing the organization's resources in the men's shelter.

The use of organizational values keeps personal agendas at bay. It also ensures that generation after generation of board

members makes its decisions strategically around the same core principles.

To develop your values you might send out a request to board members and other stakeholders to create a list of principles that they believe should guide the implementation of the organization's mission. If the group has discussed any previously – perhaps that the organization will not duplicate services provided by similar organizations – these might be listed on the form to get people thinking. Ask that people come to a session with their completed forms. Introduce the session by discussing the critical nature of values and their long-term impact. Then, break the group into smaller clusters. Request that someone act as a recorder for each group and ask that people take turns – each sharing an item from their list – until all of the ideas are out, at which point the groups can begin condensing like items. The nuances of the different like items should be thoroughly discussed so that everyone is in agreement about anything left off the final list. Reconvene the large group and have a representative from each small group share its list to arrive at a master list. (Again I recommend going around the room and having each person share one item at a time until all the ideas are on the table. This serves to validate all the groups, something that often doesn't happen if a single group reads a long list that covers much of what was on everyone else's lists.) Give people the opportunity to clarify any suggestions that are not clear in their mind. Then break into small groups once again to discuss the implications of each suggested value statement

and to narrow the master list down to a list containing only what they believe to be the core values that should guide the organization over the long term. The groups may want to explore these in greater depth, perhaps running the ideas in front of other stakeholders. When the large group comes back together its role is to thoroughly discuss the short lists brought forth by each of the small groups and ultimately decide on those principles that will govern the organization. There is no magic number of values at which to arrive. The key is coming up with a list that everyone agrees is consistent with the mission and vision and provides real guidance for decision making.

Be sure to set aside sufficient time for this process. It is not something that will be accomplished in a morning. You might also seriously consider bringing in an outside facilitator to work with the group on the values clarification and vision exercises because of their importance and the potential for widely different views.

Including a copy of the value statements or guiding principles in the annual plan and sharing them with every board and staff member during orientations is helpful. However, more impactful is ensuring that they have normative value for stakeholders by using them regularly as decision-making screens.

CREATING A RESPONSIBLE RESPONSIVE PLAN

Once your organization has put the structure in place that will provide its sense of identity regardless of what changes come its way, it's time to plan for the future in a manner that is both responsible to the mission, vision and values and responsive to the environment. While you will want to identify specific goals that will move you toward your vision and build in accountability measures, you will also want to remain adaptable. This means that the plan must constantly be reviewed and tweaked as conditions demand. So, step one in creating a responsible responsive plan is being aware of the environment and the trends that will impact it.

Considering the Environment in which You Operate

As I have implied, our organizations are constantly buffeted by what is going on in the world around us, whether it be the economic situation, upcoming legislation, a new administration, or changing technology. The World Future Society suggests, "Knowing the possibilities of the future – that is, what *might* happen – enables people to choose... to make the desired possibilities become realities and prevent the undesired possibilities from ever being realized." If we are to choose wisely it is critical to stay on top of a vast array of internal and external factors that could impact the way we do business.

Key factors that deserve our attention include:

Internal

Mission
Vision
Organizational values
Programs
Services
current and potential)
Organizational hierarchy
Control issues

Staffing needs/resources
collaboration
Space needs/utilization
Equipment needs
Efficiency levels
Marketing needs/resources
bodies
Budget
Evaluation methodologies
nonprofits

External

Government
Economy
Funding sources
Community needs
Clients (both

Consumer values
Privatization

Opportunities for

Social trends
Demographics
Volunteers
Accrediting

Technology
Competing

As with each of the steps in the planning process there are a number of different techniques you can use. And, in this case, I will provide you with several of them. None is mutually exclusive. Whatever technique(s) you choose, it is important to remember that it provides you with only a snapshot of the reality you face. If you are to maximize the benefits of trend

analysis you want to involve as many people as possible in obtaining as many snapshots as possible. By creating what is in essence a continuously evolving movie as seen through the lens of a diversity of perspectives and by always keeping your vision in mind you will be better able to modify your course of action as the circumstances change.

The simplest technique for assessing trends is to codify the information you already know. For instance, you may have noticed that in each of the last three years the State has reduced the amount of money it has given in grants to organizations such as yours. You could draw the conclusion that State funds will become increasingly scarce if not non-existent and that you will have to generate replacement funds or cut programs in the future.

The second is to research the trends that others have identified. Information is available from a variety of sources. Two of the more respected newsletter/magazines are *The Futurist* published by The World Future Society and *Trends Magazine* published by Audio-Tech. Audio-Tech also sends a "Trend of the Week" via email to current and former subscribers of its materials, which include *Business Book Summaries*. Daily newspapers and the government documents section of the public library are rich sources of information about trends, as are professional associations and watchdog organizations. The Points of Light Foundation, Independent Sector and BoardSource are just three professional organizations that regularly publish trends in the

nonprofit sector. The Independent Sector, along with OMB Watch, keeps track of legislation with the potential to influence the sector.

The third technique is to survey people who would have the information you need. For instance, you might gather information from colleagues, competitors, clients, legislators, or staff people working out in the field. You can post questions about trends on a computer bulletin board or invite someone active on a number of community boards to share his or her perspective with your group. You can also conduct focus groups, written surveys or one-on-one interviews with key informants.

Fourth is using the technique of scenario building. This is where your own creative thinkers hypothesize what most likely will happen in the future by weighing different factors with the potential to significantly impact the organization against the certainty with which you expect them to occur. We look to Peter Schwartz, author of *The Art of the Long View*, for the steps in this process, although this description represents a significantly condensed version of Schwartz's work. In scenario building you would begin by identifying the issue about which you're concerned. An environmental group interested in protecting our eco-systems might ask what the future of the Everglades will be if building continues at its current pace. Then you would list the key factors or driving forces that could directly impact the answer. In our example it might be legislation affecting building, changing weather

patterns and the introduction of non-native species of plants and animals. The third step is ranking these factors on two scales: potential impact and the level of certainty or uncertainty. Using the scales, the fourth step is to identify those factors with the most significant potential impact but also the highest degree of uncertainty. The point is to be able to say if the factors occur this way then we will have to act thusly. But, if the factors occur at the opposite end of our scale then our response will have to be dramatically different. Schwartz puts the two most significant axes into a grid, with each quadrant representing a very different future. The task then becomes to look at how the various factors you initially identified will play out in each of the quadrants and what the implications are for applying different strategies. Finally, you would want to think through the indicators that would give you early warning as to which of the four possible scenarios is the most likely to occur so that you can quickly move to take appropriate action.

Case studies are also useful for trend analysis. By looking at actual situations faced by organizations similar to your own, you can draw conclusions about those activities that may be most productive and those most likely to be counter-productive.

You may turn to computer calculations to assess probable outcomes in situations that can be quantified. For instance, you can determine the likely financial situation of your

organization should your membership significantly increase or decrease or should your foundation funding dry up.

Personally, I like to see organizations incorporate By the Way (BTW) Talk into every meeting. This involves spending 15 – 20 minutes having people share what they've been hearing, seeing or reading since the last meeting that has the potential to impact the organization. This is especially effective for use with boards. Since board members represent different facets of the community and therefore bring vastly different perspectives to the table this technique has unlimited potential to provide valuable real-time information for enhanced decision making.

I also find a discussion of dashboard criteria at each meeting to be critical to a real-time understanding the evolving environment. Much like a dashboard on a car gives a driver an instantaneous idea of how fast he or she is driving, whether the engine is running too hot, or how much gas remains in the tank each organization should have a set of indicators – or a different set of indicators for each stakeholder group – that give people an instant read on the status of the organization. Indicators might include the number of clients served in relationship to capacity, projections and the previous month's figures or the relationship between revenues and expenses.

Frances Hesselbein, former president and chief executive of the Drucker Foundation, states that defining the implications of trends is the essence of strategy. Linking the above

processes with a review of your plan, a discussion of your progress and the evaluation of opportunities that come your way will keep your plan dynamic and focused.

Setting Goals

We need goals. The best illustration of this comes from Lewis Carroll's *Through the Looking Glass* when Alice, lost in Wonderland, finds herself at a fork in the road. Confused about which direction to turn, she happens to look up into the tree situated at the edge of the road. Staring down at her is the Cheshire Cat. Alice asks the cat which road she should take, and he asks where she is headed. Alice replies that she doesn't know. The Cheshire Cat tells her simply, "Then any road will take you there." Vision provides a destination for the organization. Goals – the outcomes you wish to achieve, specified in measurable terms wherever possible and enacted with full appreciation of the environment – serve as its road map.

Each year your board should identify a limited number of macro-organizational goals (2 – 5) to be accomplished – or at least started – during the year. These desired outcomes must focus on making the community a better place, have the capability of bringing the organization closer to the fulfillment of its vision and be consistent with the organization's values. At this time the board should also identify a similar number of micro-goals for which it will be responsible. Staff should be asked to go through this exercise as well. The board's and staff's goals should be developed with an eye to their ability to

further the organizational goals. The more specific each of these goals is in terms of what is to be achieved and by when, the more directly and quickly the organization can move toward realizing its vision.

To come up with these goals you might charge different committees or departments with generating a list of outcomes reflective of their unique perspectives. One of my favorite techniques for arriving at appropriate goals is to break the board or staff into committees and ask each committee to concentrate on a vehicle required to realize the organizational vision. Assign a magazine appropriate to each group's focus. For instance, the group concerned with the organization's financial picture might be assigned *Forbes*, while the group concerned with future leadership might get *People Magazine*. Other possibilities are *Time* for programming, *Mother Jones* for advocacy, and the *Robb Report* for image. Have each small group write a headline and first paragraph for an article that might appear in its magazine if your organization were to bring its vision to life. The headline and paragraph should give the "who, what, where, when, why and how" of whatever extraordinary effort was made in the financial, leadership, or advocacy arena to facilitate this achievement and merit such recognition. Out of these task-specific mini-visions come goals that will help you reach your vision.

However, since resources are always finite, the goals that come out of the committees will have to be winnowed down to the two to five most impactful goals as suggested earlier.

This means ranking them. To determine rankings try measuring them against specific criteria such as the degree to which they are mission-oriented, essential to the vision, realistic, change for the better the services your clients receive, problematic if they are not achieved, cost effective and necessary for the achievement of other critical goals. While it is time-consuming to assess each possibility against these criteria, the end result is that the chosen goals are generally more appropriate and the buy-in stronger than if the group were to use a quick voting technique where people tend to feel pressured to vote with the majority.

Overcoming Obstacles to Goal Achievement

A discussion of potential obstacles to goal achievement and the means for overcoming these is critical at this time. One of the central tenets of planning is the need for thinking through the implications of a decision and preparing in advance for contingencies. It is rare for a decision to be void of any potential downside. This does not mean that an organization should not move forward. It does mean that it can move faster and more safely if the ramifications are known and planned for.

I find that using a worksheet based on Kurt Lewin's Force Field Analysis (see Fig. 1, *Planning for Goal Achievement*) works well for determining how to overcome potential obstacles. It does this by helping identify methodologies that will maximize the factors you already have going for you and minimize those factors that could inhibit you from achieving your goal. To use

Figure 1

PLANNING FOR GOAL ACHIEVEMENT

GOAL			
FACTORS PROMOTING ACHIEVEMENT		FACTORS INHIBITING ACHIEVEMENT	
FACTOR	ENHANCE THIS FACTOR BY...	FACTOR	LIMIT EFFECT OF THIS FACTOR BY...

Adapted from Kurt Lewin's Force Field Analysis.

the worksheet begin by listing your goal on the top line. Brainstorm all the factors that will aid you in achieving that goal. These are often related to resources, image, need or the organization's strategic direction. Place them in the far left hand column. In the next column jot down all the ways that you can build on the factors you just listed so that you are more likely to reach your goal. In the third column list those things that could keep you from achieving your goal. In the last column consider what you could do to minimize the negative impact of what you have just noted. The idea is to move from a relatively balanced position of pros versus cons to a justifiably strong pro position. However, the added benefit is that the second and fourth columns serve to provide you with the specific strategies you can employ to be successful.

Throughout the planning process it is valuable if the board and other involved stakeholders realize that the questions they ask will often be more valuable than any answers they receive. Two of the most important questions are: Why does this issue matter? And, how does this decision reflect on the organization now and in the future?

Ensuring Accountability

There's something about "the best laid plans..." You can have a well thought-out detailed list of steps but without action – the appropriate action – those best laid plans will all be for naught. Therefore, it is fundamental to spell out how progress toward your goals will be assessed, how people will be held

accountable for achieving them and what the consequences will be if the goals or individual action steps are not achieved.

One of the simplest methods for ensuring ongoing accountability is through the use of action minutes (see Fig. 2, *Action Minutes*). This way the expectations are in writing and available for easy review. Better yet, there is an expectation that they *will* be reviewed. Reference to a tickler file with the projected completion dates of each action step is another way of evaluating the progress being made toward the organization's goals.

However, it is also important to do a formal review of the entire plan at least twice a year. The purpose is to determine whether the organization is achieving the results to which it committed, and if not, why not? Questions to ask in an evaluation include:

- Are the targeted results still desirable? If not, what targets are more desirable, and why?
- Are the selected methodologies still the most appropriate way to implement the goals? Or, given your experience, do you believe another approach would be more beneficial?
- Is the organization's progress creating any unexpected complications that must be dealt with?
- Is the plan coming in within budget? If not, are the perceived benefits worth the additional expenditures required?
- How are the stakeholders and the members of the general community responding to the changes?

Figure 2

ACTION MINUTES: A TEMPLATE

TYPE OF MEETING _____
CHAIRPERSON _____
THOSE PRESENT: _____

DATE _____
START TIME _____ **END TIME** _____
THOSE ABSENT: _____

ISSUE	ACTION	THOSE RESPONSIBLE	DUE DATES	FOLLOW UP REQUIRED
If using a Consent Agenda indicate that here, then list the items that have been rolled into the single vote. Indicate reports that that are being presented for informational purposes only. Describe issues of concern or strategy that must be discussed. List recommendations.	Record (only) key discussion points that can serve as a formal record of due diligence in decision making. Indicate the result of any votes. Document proposed action plans. List assignments. Share successes.	Spell out who is responsible for each task assigned.	Indicate a due date for each task.	Codify what must be done to ensure each plan comes to fruition.

- Should you continue your program of action or shift gears and apply your resources elsewhere?

Expect that modifications to your plan will be required. As the world continues to change, so will the needs of your organization. Planning is an ongoing process.

USING THE PLAN AS A REAL STRATEGIC TOOL

There is another cartoon that I have always loved. It shows a man and woman in the business section of a bookstore. They are looking at a book: “One Hundred Excuses for Abandoning the Strategic Plan and Following Your Hunch.” My attraction to this cartoon is its authenticity. I’ve seen all too many organizations spend the time, energy and money to create a plan then put it on a shelf. We have to remember that the reason we do a plan is to have a guide that will get us where we want to go with the least amount of struggle – not because it’s something that everybody is *supposed* to do. If you have your mission, vision and values available for frequent reference, you regularly review trends and you list your goals along with the accountability measures you intend to employ you have a workable plan.

I mentioned earlier that our mission, vision, values and goals can serve as the boundaries within which all our stakeholders

– self-organizing by nature – will act with integrity as long as they truly understand them. We must make sure that these boundaries for decision making *are* understood and that they are used – eventually without conscious effort – as decision screens whenever options are brought to the table by any stakeholder group. At that point we will be employing strategic planning in its purest and most dynamic, helpful sense.

CONCLUSION

Thomas Carlyle once said, “There is nothing more terrible than activity without insight.” In today’s world, where funders are demanding accountability, competition is forcing organizations to change or close their doors and we have made a promise to our community to leave it better in some way, nonprofits must know exactly why and how they are undertaking each activity. Strategic planning that is vision-driven provides not only the insights but also the direction that keeps organizations viable.

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