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AUTHOR Pascarelli, Joseph T.; And Others

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ABSTRACT

A model of proactive planning is presented in this paper which incorporates the latest research findings related to: (1) environmental scanning (external); (2) long-range planning (internal); (3) strategic planning; and (4) educational management. Proactive planning as it occurs in the private sector is analyzed and valuable lessons which can be learned by educational leaders are underscored. The focus of the paper is on creating a vision as a leader's first role, followed by attracting people who can help realize that vision and share responsibility for achieving it. This document is one of three publications making up the Pathways to Growth series, designed to assist school leaders in planning and implementing organizational growth in the schools. (LR)

EDUCATIONAL LEADERSHIP THROUGH PROACTIVE PLANNING

by
Joseph T. Pascarelli, Ed.D.
James Carnes
and
Leslie Crohn

Prepared for the Northwest Regional Exchange
Director: Joseph T. Pascarelli

Northwest Regional Educational Laboratory
300 Southwest Sixth Avenue
Portland, Oregon 97204
(503) 248-6800

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All men have the stars, but they are not the same things for different people. For some, who are travelers, the stars are guides. For others, they are no more than little lights in the sky. For scholars, they are problems. But all these stars are silent. You—and you alone—[will] have the stars as no one else has them...

Antoine de Saint-Exupery
The Little Prince

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PREFACE

As a way of addressing the rich variety of educational themes emerging throughout the Northwest region, the Northwest Regional Exchange has been producing a collection of knowledge synthesis products over the past several years. These publications have served to summarize the most current and salient literature and research findings on a number of topics particularly relevant to educators in Oregon, Washington, Montana, Idaho, Alaska, and Hawaii. These publications, produced at the Northwest Regional Educational Laboratory include, in part:

Global Education: State of the Art (1983)

Designing Excellence in Secondary Vocational Education (1983)

Toward Excellence: Student and Teacher Behaviors as Predictors of School Success (1983)

The Call for School Reform (1983)

State Level Goverance: Agenda for New Business or Old? (1983)

Providing Effective Technical Assistance in Educational Settings (1983)

Equitable Schooling Opportunity in a Multicultural Milieu (1983)

"Pathways to Growth" represents a new direction for us. Three distinct yet interrelated topics are combined to form a set of materials which, when viewed as a unit, offer the greatest potential for assisting policy makers, administrators, and other school personnel as they go about the process of organizational growth, or as some would say, as they go about

the process of school improvement. The materials in "Pathways to Growth" include:

The Expanding Role of the Teacher: A Synthesis of Practice and Research

This paper looks at the ways in which the role of the teacher is expanding in schools across the country. The authors present the reasons behind such changes in the roles and responsibilities assigned to teachers and describe places where teachers are actually carrying out these expanded roles. The knowledge base which answers the question "Why expand the teacher's role?" is synthesized and implications are drawn for future operation of schools, school districts, and other educational agencies.

Fulfilling the Promise: A Fresh Look at Collaboration and Resource Sharing in Education

Three crucial factors which have inhibited past school improvement efforts are analyzed in this paper. These factors include: (1) promising more than can be delivered; (2) failing to effectively deal with the reality of limited resources; and 3) failing to recognize and initiate opportunities for collaboration and resource sharing. The paper specifically focuses on the promise of the third factor--collaboration and resource sharing--to illustrate its tremendous potential for improving the quality of education for America's youth. Three case studies of comprehensive, successful collaborative arrangements serve as illustrations.

Educational Leadership Through Proactive Planning

A model of proactive planning is presented in this paper which incorporates the latest research findings related to: (1) environmental scanning (external); (2) long-range planning (internal); (3) strategic planning; and (4) educational management. Proactive planning as it occurs in the private sector is analyzed and valuable lessons which can be learned by educational leaders are underscored. The focus of the paper is on creating a vision as a leader's first role, followed by attracting people who can help realize that vision and share responsibility for achieving it.

These materials represent a sweep of emerging, dynamic, and "cutting edge" topics. The research bases are, as yet, unformed and incomplete. Therefore, the emphasis throughout the three products is on successful practices, success models, and case studies. We anticipate that these practices will become the core foundation of future research studies.

Joseph T. Pascarelli

November 1985

I. INTRODUCTION

All too often, organizational planning is a flat, mechanistic, and technical activity that begins and, in most cases, ends at an annual management retreat. In many instances, an organizational mission, along with five to nine, broad-based goals, emerges from a combination of on-the-spot impressions, closely-guarded vested interests, and too-limited views of the internal world of the organization that is locked in the present time frame. Following the retreat, individual units or departments often break down these goals into a collection of discrete objectives and tasks that presumably become the bases for making decisions about staffing, programs, facilities, staff development, and budgets. The result: the production of a massive document that is made up of loosely-related detailed plans. At best, such plans are used by those who monitor task accomplishment rather than by all organizational levels as a basis for aligning and realigning action to fit changing conditions. A survey (Cohen and March, 1974) of educational administrators regarding the linkage between their organizational plans and current decisions, results in the identification of four patterns of responses:

(1) "Yes, we have a plan. It is used for capital project and physical location decisions."

(2) "Yes, we have a plan. Here it is. It was made during the administration of our last president. We are working on a new one."

(3) "No. We do not have a plan. We should. We are working on one."

(4) "I think there's a plan around here someplace. Miss Jones, do we have a copy of our comprehensive ten-year plan?"

This condition need not continue. As a result of examining the knowledge bases in planning, elements of a proactive model have been identified. When integrated with current planning approaches in organizational settings, we believe these elements yield a process that is more organic and dynamic in nature. Planning can become a shared adventure in organizational renewal, a process that binds an organization together to renew its sense of commitment, and perhaps most significantly, to reduce the risks and uncertainties associated with the future.

Roots and Resistances of Traditional Planning

Few will argue with the idea that an effective planning process is the hallmark of a successful organization. Yet considerable resistance to planning continues to exist in educational agencies as planning is viewed as an additional, unnecessary, and distracting process that gets in the way of improvement efforts. Some of this resistance can be traced back to the emergence of school planning in the 1960s.

Emanating from programs sponsored by the Departments of Defense and Agriculture, organizational planning quickly became part of the structure of the educational state and federal categorical programs (Hartley, 1968). The language and tone of these programs were rooted in the jargon of program budgeting and performance measurement, both qualitative and quantitative. As a result, the plan itself became the goal of an organization and fundamentally served to please an outside assessor rather than being a practical working tool to guide the organization in accomplishing its work.

This led to misunderstandings, the use of inappropriate processes, and finally, resistance (Knezevich, 1973). For one thing, those affected by the planning process were not involved in the setting of goals and objectives. Further, goals were too lofty and vague for constituents to take seriously. Closed, top-down, goal-setting processes were used. And finally, objectives were set at such finite levels that words like measurable, observable, and demonstrable became meaningless in the world of application. Even in the best of cases, where planning helped local improvement efforts by identifying a need for change, the natural resistance to change surfaced. Finally, traditional planning failed to consider or adjust to changes in an organization's external environment such as reductions in staff, changing student populations, staff turnover or lack of, and results of forecasting efforts. In short, planning emanated as an imposed, top-down means to formulate a systemwide philosophy, general goals, and instructional objectives primarily for the purposes of accountability (Hartley, 1968). And in some cases, these planning means were legislated. One example of this situation occurred in the state of New Jersey with the implementation of the Thorough and Efficient legislation and the requirement that every school district develop districtwide goals, conduct a formal needs assessment process, and be monitored for purposes of accountability. This type of legislated planning occurred again in California with the development of the School Improvement Program in which districts had to address deficiencies identified in a needs assessment program.

Long-Range Planning and Its Limitation

Most educational enterprises are engaged in long-range planning which tends to focus on the final blueprint of a plan and organizational goals and objectives five years from now. One obvious benefit of long-range planning is that it looks beyond the present and attempts to project by using such techniques as forecasting or futures scenarios. Usually organized as a separate and distinct function however, long-range planning stresses internal analysis. By applying quantitative methods, attention is given to such factors as internal resource and staff requirements over the next five years. Usually, an organizational mission is identified along with priorities and long-range program additions and/or deletions.

One key limitation of long-range planning is that it holds an inside-out perspective. That is, its pivotal base is the organization and the present. Long-range planning tends not to include, on a systematic basis, information about the changing external environment, but rather, bases planning on information learned from the past and immediate present. Thus, long-range planning is not cast in the future (for example, taking trends, shifts, etc., into account) Long-range planning addresses four fundamental questions which in themselves speak to sound planning issues but are grounded in the here and now as a starting point for growth. These fundamental questions include (Morrison and Renfro, 1984):

(1) Where is the organization now? (needs assessment)

(2) Where is it going? (forecasting)

(3) Where does it want to go? (goal-setting)

(4) What does it have to do to change where it is going to where it wants to go? (change process or action plan)

More specifically, long-range planning can be viewed as a continuing and cyclical process:

> The long-range planning cycle begins by MONITORING selected trends of interest to the organization, FORECASTING the future of those trends normally based on extrapolation from historical data (using regression or other techniques), SETTING ORGANIZATIONAL GOALS in response to these forecasts, IMPLEMENTING operational plans based on these goals, and MONITORING the effect of these plans on those selected trends and issues (Morrison and Renfro, 1984).

While these elements reflect sound planning processes, they must be merged with other elements found in the research on strategic planning to enhance the capability of organizations to plan more effectively in a changing world.

Strategic Planning

While long-range planning may be viewed as an "inside-out" and operational planning process, strategic planning starts with a vision and is at once cast in a frame of reference that enables organizations to identify desired conditions first. Thus, strategic planning moves traditional and long-range planning off dead center (the present) and aims to exploit the new and different opportunities of tomorrow, in contrast to long-range planning, which tries to optimize for tomorrow the trends of today (Drucker, 1980). With strategic planning, current and projected trends are used to make current and not future decisions. In light of environmental considerations, strategic planning makes explicit what the organization will have to do to accomplish its purposes.

We can further contrast long-range and strategic planning by looking at their respected timelines: long-range planning assumes a closed system within which short-range, five-to-ten year blueprints are constructed, whereas strategic planning assumes an open system whereby organizations must constantly change as they integrate information from turbulent environments (Cope, 1981). As a result, long-range planning focuses on the final blueprint of a plan, while strategic planning focuses on the process of planning. Figure 1 on the next page illustrates the contrasts between these two planning approaches.

One definition of strategic planning states that it is "the process of developing and maintaining a strategic fit between the organization and its changing marketing opportunities" (Murphy, 1981). Strategic planning, then, is an "organizationwide process that anticipates the future, and culminates in statements of intention that match strengths with opportunities and the management of threats" (Morrison and Renfro, 1984). In other words, with strategic planning, organizations can look toward the probable future to reach decisions and then cast those decisions into an overall institutional strategy (Keller, 1983).

Ingram (1985) states that strategic planning is a process for:

(1) Identifying the purpose or mission of an organization

(2) Recognizing internal and external factors that do or can affect the organization

(3) Analyzing those factors to determine the effects they do or will have on the organization's ability to accomplish its mission

Figure 1

Characteristics of Long-range Planning
Contrasted to Characteristics of Strategic Planning

Long-Range Planning	Strategic Planning
Trends of today are used to plan for tomorrow.	New and different opportunities of tomorrow are exploited.
A closed system is assumed.	An open system is assumed.
Short-range, five-to-ten year blueprints are constructed.	Plans are constantly modified as new information from changing environments is integrated.
The focus is on a final blueprint of a plan.	The focus is on the process of planning.
The focus is on internal analysis--applying quantitative formulas and models for the development and distribution of resources.	The focus is on the external environment and judgmental decisions--applying qualitative information for resource commitments.
Existing data are used to project future plans.	Current and projected trends are used to make current (not future) decisions.
The emphasis is on the science of management, planning and decision making.	The emphasis is on changes outside the organization, such as values, governmental actions, and what other agencies and organizations are likely to do.
A scientific process is employed, using detailed and interrelated data sets, agency plans, and extrapolations of current budgets.	An intuitive, creative process of decision making is employed, to determine how to guide the organization over time in a turbulent environment.

(Adapted from Morrison and Renfro, 1984.)

(4) Developing strategies (a game plan) for dealing with them

(5) Instituting action plans to carry out those strategies and achieve the mission

The research delineates five major elements of strategic planning: (1) establishing a vision; (2) external scanning; (3) internal analysis; (4) establishing a mission; and (5) developing goals. Each of these is discussed in the following.

Element No. 1: Establishing a Vision

Although not identified as a primary element in most models of strategic planning, we feel this element, which is more attitudinal in nature, is also crucial. Establishing a vision is a proactive stance taken by organizational leaders who begin by sharing their dreams related to the future goals, activities, and accomplishments of the organization. Establishing a vision occurs when managers ask such questions as "Where do we want to be?," "What do we want to look like?," and "How can we create our future?" In other words, establishing a vision involves an organization in self-examination and is, therefore, less analytical and more anticipatory and stimulating. Establishing a vision involves:

(1) Creating a focus, to keep an organization on track

(2) Articulating intentions and calling people into the organization

(3) Committing oneself as a leader at the head of an organization

(4) Taking risks and motivating others to follow

(5) Establishing confidence among employees that they are capable and a valuable asset to the organization

(6) Motivating and moving people into action

(7) Discovering new possibilities, reading signs of coming change, exploring ways to prepare for the future

(8) Leading an organization with zest, enthusiasm, and energy

Element No. 2: Scanning the Environment

The second element in strategic planning has to do with identifying the social, political, economic, and educational forces in the environment so the organization can "fit in" or "mesh" with the external context. Environmental scanning helps managers align the organization; that is, environmental scanning helps managers identify the external factors that do or can affect the organization and then analyze those factors as they do or will affect the organization's ability to accomplish its mission. In education, environmental scanning has to do with looking at the effects of such conditions as fewer teachers, increasing or decreasing student populations, public demand for a better trained work force, reduced parental involvement with the schools, population shifts, and so on. Environmental scanning raises three basic questions (Murphy, 1981):

(1) What are the major trends in the environment?

(2) What are the implications of these trends for the organization?

(3) What are the most significant opportunities and threats?

The purpose of environmental scanning is to develop a picture of the most significant external factors that will affect an organization and around which that organization will formulate its future goals, strategies, structures, and systems. Environmental scanning is not futuring, nor is it developing future scenarios. It involves the study of certain shifts in the external world, such as the following:

(1) From centralization to decentralization

(2) From basic skills to higher order teaching skills

(3) From analysis to synthesis

(4) From cultivating permanence to cultivating impermanence

(5) From autonomy to synergy

(6) From free standing or independent structures to interactive structures

(7) From mechanistic to organic

(8) From linear to dynamic

(9) From top-down to participating

(10) From uniformity to diversity

Put another way, environmental scanning identifies:

(1) Economic trends such as those which have to do with worker productivity, employment, and technology

(2) Social trends such as those which have to do with demographic shifts, and changes in the family unit

(3) Personal trends such as those which have to do with greater demands for sensitivity and interpersonal skills

(4) Political trends such as those which have to do with public support, or lack of support, for bond issues; the decreasing role of the government at state and local levels

One way to deal with these types of trends is through a threat and opportunity analysis (Murphy, 1981). Murphy defines an environmental threat thusly: "...a challenge posed by an unfavorable trend or specific disturbance in the environment that would lead, in the absence of purposeful action, to the stagnation, decline, or demise of an organization or one of its programs." Since not all threats are of the same magnitude, they will not demand the same action. Murphy (1981) notes that school administrators should assess each threat according to two dimensions: (1) the severity of the threat (measured by how much it would cost the organization in terms of money or prestige; and (2) the probability that the threat will actually occur.

Murphy (1981) suggests that an opportunity analysis can be more important than threat analysis to an organization. In carrying out a threat analysis, an organization can maintain status quo, but it will not move forward. In contrast, carrying out an opportunity analysis allows an organization to move ahead and take risks. Murphy (1981) defines an opportunity analysis thusly: "...an attractive area of relevant action in which a particular organization is likely to enjoy superior competitive advantages." Further, Murphy contends, an opportunity can be assessed on two dimensions: (1) the potential attractiveness of the opportunity (measured by how much the organization might profit from the opportunity; and (2) the probability that the organization can successfully take advantage of the opportunity.

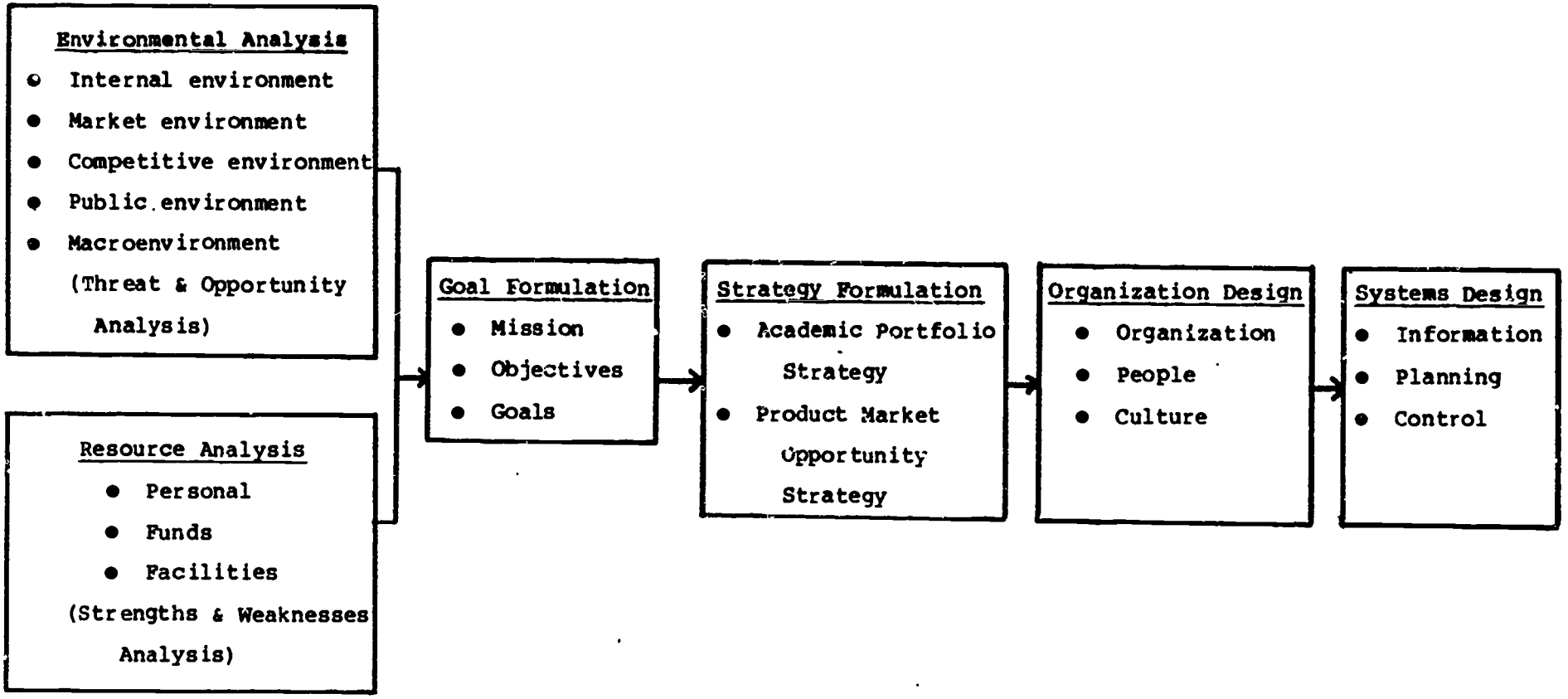
To sum, environmental scanning differs from the comprehensive, analytical process most organizations are familiar with. Managers who are successful at scanning the environment to determine future and current trends, are able to identify those external factors that can dramatically affect the organization. They are then able to analyze those factors in terms of how they will affect the organization's ability to accomplish its mission.

Element No. 3: Internal Resource Analysis

The third element in the strategic planning process has to do with identifying the strengths and weaknesses of an organization, and follows the environmental analysis. Some might call this step an "internal audit." This type of analysis studies the current situation of an organization in terms of available resources; that is, the analysis looks at staffing, student needs, resource allocation, staff and administrative

evaluation data, facilitating community support groups, student achievement data, program offerings, organizational and management structures and so on. Murphy (1981) relates this internal resource analyzing element to his overall process of strategic planning in Figure 2, shown on the next page.

Figure 2: Strategic Planning Process Model



Source: Murphy, Patrick E. "Strategic Planning for Higher Education." Journal of Higher Education, Vol. 52, No. 5, 1981.

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The critical aspect of this element is that it is present-oriented. It answers the questions "What do we have going for us?" and "What are we lacking or weak in?" In evaluating their strengths and weaknesses, administrators should not rely exclusively on their own perceptions, but rather, should initiate an image study of how the organization is perceived by its significant publics, such as students, parents, business and industry, and others. The findings of this type of study may reveal that the organization has certain strengths and weaknesses it may not even be aware of. The study may also reveal that administrators have placed too great an emphasis on some strengths or weaknesses or exaggerated others--perceptions the various publics may not share.

Element No. 4: Identifying the Mission

So far in the strategic planning process, a vision has been established from the external and internal analyses. Administrators are now in a position to articulate the mission of the organization, out of which will come the goals (Element No. 5). Murphy (1981) contends that a useful way for school administrators to examine their mission is for them to answer the following questions:

(1) What is our business?

(2) Who is the customer?

(3) What is our value to the customer?

(4) What will our business be?

(5) What should our business be?

Answering such questions may appear simple and obvious, yet school administrators often find them to be among the toughest questions they

have to face. Successful administrators are those who continuously ask and answer these questions thoughtfully and thoroughly (Murphy, 1981).

Responses to such questions result in a statement of mission for the organization, which identifies the design and purpose of that organization. The statement of mission also determines how resources will be allocated to different and changing demands. In this sense, the mission statement is the "glue" of the organization as it keeps organization members from floundering--searching for a common and binding theme.

It's important to note that statements of mission are not designed to "express concrete ends, but rather, to provide motivation, general direction, an image, a tone, or a philosophy to guide the enterprise" (Steiner, 1979). In all cases, developing statements of mission must include the direct involvement of top management.

Many statements of mission developed by organizations are somewhat vague in nature. However, this can be seen as a virtue as vagueness allows for flexibility in a changing environment. Most important, all statements of mission must be written and communicated widely to individuals and groups in the community.

Finally, statements of mission help to crystallize a school or district's focus; they contribute to the overall effectiveness of an educational organization by leading to the next element in the strategic planning process--the development of goals.

Element No. 5: Goal Formulation

The environment and resource analyses provide school administrators with necessary background and stimulus to develop basic organizational goals and objectives. Though the goals may be clear during the formative years of the organization, they will need to be reassessed and reviewed as environmental conditions change. A review of organizational goals can satisfy school leaders that the goals are still clear, relevant, and effective (Murphy, 1981).

The importance of goals to an organization is that they help create a clear and realistic picture about the nature and function of that organization and its future. Goals also help school leaders set priorities and directions; develop appropriate plans; set standards for performance; and develop procedures for evaluating the results. Therefore, goals set the standard whereby school leaders are able to plan, control, and monitor activities.

Murphy (1981) notes that the issue of organizational goals breaks into two distinct steps: (1) determining what the current goals are; and (2) determining what the goals should be. Individuals and groups within an organization will bring diverse perspectives to the formulation of goals, based primarily on their roles and responsibilities. For instance, a curriculum director may see as a major goal the upgrading of curriculum scope and sequence; the principal may see as a major goal the addition of more science and math teachers; and a district superintendent may see as a major goal decreased costs of education. Therefore, continuous review and revision of goals requires the involvement of many individuals and groups to determine their unique perceptions. Such insights are not only

valuable, but the goals are more likely to be embraced and supported because of group involvement in the process (Murphy, 1981).

After organizational goals have been determined and agreed upon, the next steps in the planning process are the establishment of objectives and the development of action plans. These stages are direct outgrowths of long-range planning rather than unique to strategic planning. However, the elements identified in the preceding discussion are those which are key to the strategic planning process, and give shape to the proactive and continuous nature of planning.

A major difference between the long-range planning process and the strategic planning process is that strategic planning is more flexible and adaptive and allows for the testing of ideas. Strategic planning allows for the continuous adaptation to changes in the environment. Strategic planning is a highly interactive process. It includes routine scanning of the literature, practices, and trends; continuous surveying of a variety of groups for information and attitudes; and frequent analyzing of the organization's level of fitness to be relevant and responsive. In short, strategic planning goes a step further than long-range planning by allowing the organization to become active in shaping its future.

Figure 3 on the next page displays one strategic planning model for school systems taking technical and human dimensions into account.

Figure 3
A Strategic Planning Model for School Systems

	Technical Dimension	Human Dimension
Key Steps	**Key Questions**	
Determining the Functions and Scope of Schools	Who are our clients? What are their needs, wants? What business are we in? (To what do we allocate resources?)	Catalytic force for change Leadership
Situation Analysis	Who is competing for resources? Who is the educational competition?	Group processes
Planning Assumptions	What economic, social, and technological trends are likely to prevail over the next five to ten years? What trends in education are likely to affect the public schools?	Collaborative problem solving and decision making
Planning Contingencies	What resources are likely to be available to schools? What positive forces are likely to exist? What constraints or negative forces are likely to exist?	Maintenance of momentum, direction, climate
Planning Objectives	How can schools respond more effectively to the needs of clients within the context of environmental factors, assumptions, and contingencies? How can productivity be improved?	Mechanisms for management of relationships, conflict
Strategies	What steps should be taken now, or later, to respond to the questions in the above section?	Personal and organizational understanding of, and commitment to, the strategic plan
Resources Required	What resources are needed now? Later? In what amounts? How allocaced	
Monitoring and Evaluation	Do assumptions remain operant? Contingencies? Are objectives still relevant? Are strategies still productive? Is resource allocation adequate and/or appropriately distributed?	

rce: Duckworth, Alice and Robert Kranyik. "What Business Are We In?" The School Administrator. August 1984, pp. 6-8.

II. PROACTIVE PLANNING

Once the educational leader has a clear understanding of what strategic planning is, and is not, it becomes apparent that an important dimension is missing. As professionals, educational leaders bring to their roles additional complexities. The traditional description of strategic planning, as an overlap of long-range planning and environmental scanning, falls short of describing the activities that must occur if educational leaders are to make use of that model. When educational management activities are overlaid on the strategic planning model, the result is a more relevant and encompassing model which can more appropriately be called **PROACTIVE PLANNING.**

While strategic plans might be described in terms of roadmaps with fixed pathways to specific destinations, a sailing metaphor better describes proactive planning:

The educational leader, as captain of the sailing vessel, chooses a destination and plots a course on the ship's charts. Once under sail, however, the captain must constantly make adjustments to sea currents, changing winds, the ebb and flow of the tides, and other conditions that may affect the course of the ship. The captain is at once reactive and proactive. The captain realizes the present set of conditions, and is aware of the anticipated conditions; therefore, the captain makes adjustments in the rigging of the sails and the angle of the tiller in response to existing requirements, but never loses sight of the ultimate

destination and the projected conditions to which adjustments are made. The actual path of the sailing vessel may have only a general resemblance to the charted course. However, the destination is reached.

It is because of the proactive nature of the planning, with its concomitant allowance for continuous adjustments according to existing and projected conditions, that the captain is able to finally arrive at the chosen destination. Without belaboring the metaphor, suffice it to say that many is the day that educational leaders may find themselves in turbulent waters, unable to rely on their charted courses, but able to make necessary adjustments to keep their organizations moving toward their destinations only because proactive planning has allowed them to do so.

Strategic planning is not new to the educational leader. In the military, sports, and business the concept has been applied for years. What makes it important for educational leaders to consider at this time is the acknowledgement that our society is changing from an industrial base to an information base, and that we cannot continue to ignore existing conditions, nor anticipated conditions. Through proactive planning, educational leaders can address the future with confidence and a sense of professionalism as illustrated on the next page (Figure 4).

Figure 4

PROACTIVE PLANNING IS . . .

- Action plans based on professional judgments of educational leaders
- Planning before necessity requires it
- Plans of action built on positive responses to anticipated requirements
- Plans designed to support the education of students for the future
- An ongoing process by which educational leaders adjust "proactive management" to changing conditions
- A projection of future external and internal influences on the educational system
- A forward-looking planning system which allows the future to happen for the institution, not to the institution

Strategic planning is like trying to walk on water to reach the destination on the other side of the river; proactive planning, in contrast, is knowing where the stepping stones are. For the educational leader, proactive planning requires bringing the science and art of proactive educational management to bear upon the strategic plans of the school district. It requires the judicious use of intuition, professional judgment, understanding of the humanness of the enterprise, and idealism. Strategic planning requires the simultaneous application of the principles of proactive management in the planning and operation of the schools. Through proactive planning and management, educational leadership becomes holistic.

STRATEGIC PLANNING IN THE PRIVATE SECTOR

Some valuable lessons can be learned by educational leaders from the private sector experiences with strategic planning and related activities.

The military metaphor implied in strategic planning limits our ability to think about management sensibly, according to Peters and Waterman (1982) in citing Karl Weik's conclusions:

> First, the use of the military metaphor assumes that someone clearly wins and someone else clearly loses. In business, this is usually not the case. Second, Weik argues that the military metaphor is a bad choice because people solve problems by analogy, and as long as they use the military analogue, "It forces people to entertain a very limited set of solutions to solve any problem and a very limited set of ways to organize themselves."

While planning is important, care must be taken not to overdo it. A frequent sign of planning abuse is "paralysis by analysis". Some chief executive officers of major corporations suggest that once the plan is

developed, that plan should be put on the shelf, not to be used for decision making purposes, but to recognize change as it takes place. However, these same CEOs recognize that it is essential to at least commit the plan to paper.

One of the most striking observations of excellent companies is that they appear to "do their way into strategies, not vice versa." According to James Brian Quinn, a leading researcher of the strategic process, this means the role of a leader is one of labeler and orchestrator, of shaping actions, usually after the fact, into lasting commitment to a new strategic direction. In other words, excellent companies act, <u>then</u> develop their goals and targets.

Peters and Waterman (1982) believe that the major reason big companies stop innovating is due to their dependence on a number of mismanagements like rigid strategic direction setting. Thus, some of the big companies forget how to learn and quit tolerating mistakes:

> The experimenting process is almost revolutionary. It values action above planning, doing above thinking, the concrete above the abstract. It suggests, in a very Zen-like fashion, going with the flow: doable [<u>sic</u>] tasks, starting with the easiest and most ready targets, looking for malleable champions rather than recalcitrant naysayers.

"Strategic" is an overused word that has become an automatic modifier to planning. However, it does convey an important idea in the change process--deliberate and conscious articulation of a direction. Strong leaders articulate direction, and create a vision of a possible future that allows them and others to know which actions will lead to the goals (Kanter, 1983).

SHARED VALUES

A few key values can drive an organization to excellence, especially when employees are given the autonomy to take initiatives in support of those values. Autonomy is a product of discipline. The discipline (a few shared values) provides the framework. Discipline gives people confidence (to experiment, for instance) stemming from stable expectations about what really counts (Peters and Waterman, 1982).

Companies that do focus on a few key business values have less need for daily instructions. Their values are clear, and they are acted out at all levels of the organization. It is not merely the articulation of those values, but their content which makes it clear what the company stands for. This is the role of the leader: clarifying the value system and breathing life into it.

In successful companies there is a balance between individual effort on the one hand and teamwork on the other. A large company cannot succeed if each division goes off entirely on its own; there must be some teamwork among divisions (Ouchi, 1984). It is obvious that excellent companies seem to have developed cultures that have incorporated the values and practices of the great leaders. Those shared values have survived long after the passing of the original leader. Therefore, it appears that the real role of the chief executive is to manage the values of the organization.

CREATING A VISION

Creating a vision for the organization is the leader's first role, followed by attracting people who can help realize that vision by

adopting the vision as their own and sharing responsibility for achieving it.

The following list characterizes the concept of vision as Naisbitt and Aburdene (1985) allude to it in Re-inventing the Corporation:

- The leader who would create a vision sufficiently compelling to motivate associates to superior performances must draw on the intuitive mind.
- Successful leaders are concerned not with "doing things right" but with "doing the right thing."
- Alignment transforms a leader's vision into a shared corporate vision.
- The only way to translate vision and alignment into people's day-to-day behavior is by grounding these lofty concepts in the company's day-to-day environment.
- Alignment exists when there is a fit, a meshing between the company's goals and the individual's.
- When you identify with your company's purpose, when you experience ownership in a shared vision, you find yourself doing your life's work instead of just doing time.
- When there is a synergistic relationship between your goals and the company's, your power to achieve personal goals is amplified by the corporation.
- Vision is the link between dream and action.

USING CLUES FROM EXTERNAL ENVIRONMENTS

While long-range planning is basically responsive to the conditions within the organization, the addition of environmental scanning of external conditions which effect the organization produces strategic planning.

In excellent companies, customers have input into every aspect of the business. The excellent companies really are close to their customers. Other companies talk about it, but excellent companies do it (Peters and

Waterman, 1982). This external focus makes these companies extremely sensitive to the environment and more able to adapt than the competition. In other words, innovative companies are adroit at making continuous responses to changes of any sort in their environments.

By listening to their customers and responding to the external environments, the excellent companies are inviting the customers into the company--a mutual partnership is the result.

Together with the need to scan the external environments which affect the corporation, effective managers are recognizing that they must trust their guts more often in making key business decisions. Intuition is becoming increasingly valuable in the new information society because so many data are available.

James MacGregor Burns (1978) has posited another, less frequently occurring form of leadership, something which he calls "transforming leadership"--leadership that builds on a person's need for meaning; leadership that creates institutional purpose. Burns sees the transforming leader as someone who is also the mentor, the linguist, the value shaper, the exemplar, and the maker of meanings. The transformational leader, according to Burns, has a tougher job than the transactional leader, as the transformational leader is the true artist and the true pathfinder.

PROACTIVE PLANNING FOR EDUCATIONAL LEADERS

Why do educational leaders need to be proactive planners? Naisbitt and Aburdene, in Re-Inventing the Corporation (1985), discuss the trends that

are influencing the future of American education. They suggest that today's educational system was never meant to serve the needs of today's information society, but rather, was explicitly designed to fit the industrial society, a time when "it made sense to treat everyone the same" (Naisbitt and Aburdene, 1985). Further, Naisbitt and Aburdene warn that to continue the type of education developed during the Industrial Age is to ill-equip young people to function in the Information Age. These authors note that the most creative educators and schools are those who are "experimenting with new models, grouping for the new ways and new arrangements that make sense now." They go on to say, "Once we accept the challenge of re-inventing education, we are free to stop justifying our failures and move ahead to the creative part, which asks, 'Where do I go from here?'" (Naisbitt and Aburdene, 1985).

PROACTIVE PLANNING FOR THE SCHOOLS

Proactive planning is not a prescription or formula, it is a management style. As Ingram (1985) says, "It [strategic planning] is a process for being proactive and not allowing the people in an organization to view themselves as victims. It is what good coaches do in devising a system and building a team that can win; what outstanding musical conductors do in building and training a great orchestra; what reliable admirals and generals do in figuring out how to win a war; what scientists do in order to put a man or woman on the moon; and what successful business people do in making a profit."

Proactive planning is what educational leaders must do to develop a system of education for the future that is responsive to the needs of the new students of the information age. It begins not where we are, but

with a vision of where we want to be; a vision of what education should be like.

School districts must visualize where they want to be, what they want to look like, set out to identify the social, political, economic and educational forces in their environments, and establish a plan to control and manage those factors in terms of achieving their goals (Ingram, 1985).

Public sector institutions such as schools face unique problems that make strategic planning efforts more challenging than in the private sector. According to Duckworth and Kranyik (1984), major problems schools must face include politics, lack of leadership continuity, and constantly changing public demands for services based on special interests. Other problems as discussed by Duckworth and Kranyik (1984) include those that stem from the nature of teaching and learning as well as difficulties in defining priority learning outcomes and their subsequent evaluation.

The case for proactive planning is strengthened by all these factors. Without proactive planning, external forces that affect school systems are dealt with randomly, rather than in an interconnected, holistic way.

III. SUCCESSFUL PRACTICES IN STRATEGIC PLANNING

Strategic planning approaches are increasingly found in educational organizations. In this section, we briefly present some of these approaches, including two school districts, a community college in Albany, Oregon, and a group of colleges in the state of California.

Jefferson County Public Schools in Lakewood, Colorado, has been actively using strategic planning processes for over a year and a half. One assistant superintendent described the strategic planning process as a way of thinking; that is, he noted that it is imbedded in the processes of problem solving. Strategic planning in the Jefferson County school system has helped the district clarify its mission and goals and become more skilled in the processes of ongoing change. The goal is to assist members of the school system to think more strategically, thereby making the organization more responsive to changing conditions.

A similar pioneering effort is underway in Detroit Public Schools where a shift has been made from decentralization to recentralization. An underlying motive for the shift, according to one assistant superintendent, is to move Detroit from a reactive position into a more proactive position. District staff began their work by searching the literature for models of strategic planning currently found in other organizations; however, few models were found that directly related to long-range planning in a large urban school district. Therefore, for the most part, Detroit had to devise its own system.

The district is currently midway in their efforts to develop a general direction, broad goal statements, and a workable plan. To date, the district has completed the following (Dronka, 1985): (1) scanned external factors on national, state, and local levels; (2) analyzed the school system's internal status (finances, personnel, student profiles, and so on); (3) produced a key stakeholder's report from surveys, meetings, and interviews with parents, community groups, students, school staff members, board members, and the business community; and (4) formed a 12-member planning team comprised of the superintendent and top advisers. At a November, 1984, retreat, the planning team sifted through the data, drafted a mission statement, and set five district goals.

The next step in the strategic planning process is another retreat planned with the board of education to solicit their feedback on accomplishments to date. This retreat will be followed by another at which time district goals will be finalized and measurable objectives will be developed. The plan is scheduled for completion during the summer of 1986.

At Linn-Benton Community College (LBCC) in Albany, Oregon, a strategic planning process has been incorporated as part of overall managerial functions of that institution. The LBCC approach differs somewhat from the traditional long-range planning models typically used in educational organizations.

Educational leaders at LBCC recognized that planning was a necessary part of management and therefore divided it into special areas such as facilities, construction, financial, and instruction and curriculum,

which includes staffing and management staffing with prescribed functions. LBCC chose to avoid the pitfall of developing a long-range plan as the culmination of the work of a committee (or full-time planner) which is then not used because the plan becomes outdated as conditions change. LBCC officials decided that it was imperative to use planning techniques which would stabilize a quality community college in a highly unstable environment. They chose strategic planning as a process for management to consider when faced with planning for the future. Strategic planning or decision making at LBCC incorporates an analysis of the external environment and focuses on keeping the institution in step with the changing environment. It requires a careful inward review of the campus and a review of the outside world.

LBCC management developed a strategic plan using a set of planning assumptions which formed the basis for future refinement and review by a Blue Ribbon Citizen Committee and the Institution Advisory Council. In addition to this plan, information compiled by a market research consultant and additional statistical information was used to assist in formulating strategic decisions with respect to the future of LBCC. A comprehensive review of the role and mission of LBCC was accomplished and a review of the instructional program was completed.

The LBCC strategic planning process used input and information from a variety of sources both internal and external to the college. According to Gonzales and Thomas (1984), the advisory planning team has the following primary responsibilities:

- To develop a strategic plan using community and internal assessment which translates into an action plan for campus programs

- To develop ongoing mechanisms for community involvement in planning
- To develop a financial plan that follows the strategic planning process

This planning is a collaborative process of four groups: (1) administrative staff; (2) community advisory council (Blue Ribbon Committee); (3) institutional advisory council; and (4) board planning committee. The planning process and the work of these committees take place simultaneously and it is viewed from that perspective. It is not a step-by-step linear process. The strategic planning process requires open communication and consensus toward the end result of strengthening LBCC and providing for its future.

Another approach to strategic planning is found in a group of colleges in California--San Francisco Community College District, Long Beach City College, Riverside City College, and the Yosemite Community College District.

In 1982, the Educational Master Plan Project was launched in San Francisco Community College District (SFCCD). Now, at the beginning of 1986, this large-scale, complex project in comprehensive strategic planning is in full operation. The emphasis is on the process of planning and stemmed from a need by district staff to thoroughly understand themselves so they could anticipate change and "respond flexibly and effectively in order to maintain institutional vitality, quality, and a competitive edge" (Models of Strategic Planning in Community Colleges, 1983). The focus of the plan was to demonstrate accountability and document the quality and productivity of college

programs as well as to develop a plan for resource allocation in a changing and uncertain environment.

The plan has led to extensive statements of mission and goals and the implementation of a "comprehensive strategic planning process that flexibly and responsibly connects program review, budgeting, and accreditation processes" (Models of Strategic Planning in Community Colleges, 1983).

The key assumptions underlying the plan included:

(1) The process of planning would be continuous, systematic, and cyclic.

(2) The process would be flexible and open to change.

(3) The process would encourage broad-based participation by all relevant constituencies in the district to maximize "ownership."

(4) The process would model strategic, comprehensive planning, using data gathered from the district's external environment and from internal organizational operations.

(5) The process would include future orientation, a stipulated time frame, allocation of resources, and top-level support.

(6) The process would have as an outcome the foundation for making decisions related to resource/budget allocations, staff, facilities, educational programs and services, and the future directions of the district.

(7) The process would include information gathering and dissemination, program review, budgeting and planning and be integrally interwoven into the organizational life of the district.

The Long Beach City College (LBCC) approach to strategic planning was geared to opening up communication among several constituencies on campus, as it was believed that without strong administrative support, planning cannot work. Rather than appointing one person as a planner,

the approach was to involve a large number of staff in as many roles and activities as possible. The aim was to develop a continuous system that would operate smoothly through the five-year review of the Accrediting Commission and would, therefore, be an ongoing, functioning process.

The key assumptions underlying the plan included:

(1) The process would be ongoing.

(2) The process would encourage open communication.

(3) The process would include a strong commitment from all segments of the college.

(4) The process would involve planning facilitators working directly with the various constituencies who would make up nine committees (organized around the nine accreditation standards).

(5) The process would involve the formation of committees with both horizontal balance (sex, college area, campus division, ethnicity) and vertical balance (faculty, classified personnel, managers and students).

(6) The process would involve five environmental scan teams that would produce futures assumptions in such areas as lifestyle, demography, employment, public policy, and education.

The result of the LBCC strategic planning process has been a "consensus on perspective" among the leadership of all college constituencies. Specifically, this leadership basically agrees on the following (Models of Strategic Planning in Community Colleges, 1983):

(1) The college is facing a serious fiscal problem.

(2) The world has changed significantly; therefore, colleges cannot do "business as usual."

(3) A clear direction is necessary for colleges to survive and preserve their autonomy.

(4) Strong administrative leadership is necessary in the formulation of a future direction.

At Riverside City College (RCC), a strategic planning process is underway that focuses on excellence, pride, and innovation in a climate that helps create cohesion. At an annual retreat, college achievements, based on established outcomes, are noted as they relate to creating a positive climate. The outcomes approach establishes targets, gets results, and keeps RCC on the move (Models of Strategic Planning in Community Colleges, 1983). The outcomes approach also introduces the concept of change to the faculty and sets the stage for planning. The attitude at RCC is one of being "on the move," taking risks, and committing resources to bring these changes about. A document has been developed to assess the strengths and weaknesses of RCC and to help the college face future problems. This document is a result of three separate efforts: (1) strategic planning which includes the institution and its social environment; (2) procedural planning which is within the institution, and defines what needs to be done to get to where the college wants to be; and (3) operational planning which includes immediate steps with the locus primarily in programs.

Key assumptions underlying the RCC planning document include:

(1) The future will be different from the present.

(2) Strategic planning is coherently dynamic, loose, and flexible; it is not static and must allow an institution to be able to shift and respond to changing trends.

(3) An institution must take risks.

Strategic planning helped the administrative staff of RCC to determine what direction the college should take to allow for future circumstances and to weigh the various alternative courses open to them. Through strategic planning, administrators were also helped to determine resource

allocation and to establish consensus among the faculty in terms of college directions and activities.

RCC's successful approach offers several key concepts which can be useful to other community college planners, regardless of demographic, employment, or environmental differences (Models of Strategic Planning in Community Colleges, 1983):

(1) The development of a college theme fosters more universal sentiment and cooperation among the various constituencies in the college. The idea of sharing a vision of college ideals also brings about a greater sense of cohesion and mutuality.

(2) Strategic planning is inherently dynamic. It changes with the changing face of the college's and community's needs. It must be flexible and respond to unexpected as well as predictable trends and events.

(3) In order to grow, a college must be willing to take risks--the right and desired risks that can enhance the college and promote change both internally and externally.

(4) The college climate is important so that an atmosphere for change and planning is created and sensed. The college should be guided by considering "where it is" and "where it wants to go" in the decades ahead.

The planning process at Yosemite Community College District (YCCD) is now a way of life. It is an information based budgeting system and begins at the basic organizational units such as college departments. Strategic planning at YCCD is participatory and "bottom-up;" it links both planning and budgetary processes. Crucial to the planning process is an assessment system which gathers, processes, stores, and reports essential information. Because it builds on the foundations of the basic organizational units, the process has potential for involving a broad range of college and district personnel (Models of Strategic Planning in Community Colleges, 1983).

Impetus for strategic planning at YCCD can be traced to the uncertainties and problems resulting from Proposition 13 and collective bargaining. School administrators desired a planning process which would involve people at all levels and help the district respond more effectively to crisis situations. Three steps were laid out: (1) to find out what YCCD is doing and what it should be; (2) to find out what YCCD can, or should, or ought to do; and (3) to find out how to close the gap between what is and what should be. As a result, an assessment program was designed and implemented as well as a planning and budgetary system. Crucial to the plan were concurrent process goals which included building confidence in the system, winning support and participation, and alleviating adverse attitudes.

Underlying assumptions to the YCCD plan included:

(1) The process should grow slowly, be low key and low profile.

(2) The process should be developed by those who will be directly served or affected.

(3) The process would reflect the literature and data gathered, but would be invented "at home."

(4) The process would involve a number of committees "as small as possible but as representative as possible."

(5) The process would not have a time limit, hidden agendas, or blueprints drawn up in advance to predetermine the outcome.

(6) The process would have complete, unfaltering commitment from top management.

(7) The process will be continuous, set on a yearly review cycle and be staged in clear, sequential phases.

(8) The process will tie budget requests to operating unit needs, operations and plans.

(9) The process will collect and use information which is timely, accurate, comprehensive, and uniform and capable of helping administrators see what is going on in the district.

(10) The process will be an integral part of the overall college and district decision-making process.

At YCCD, improvement in the processes and their products is continued, as experience and data accumulate. The heavy investments of time, energy, and resources during the first years have begun to return numerous and varied pay-offs. The benefits include improved accuracy in data, holistic monitoring capabilities, greater openness and candor among staff, and improved employer and employee relations.

IV. PROACTIVE PLANNING: SURVIVAL SKILL FOR EDUCATIONAL LEADERS

The amount of time devoted to proactive planning is directly proportional to the level of responsibility an educational leader has within the organization. In other words, the higher a leader's position appears on the organizational chart, the more time the leader should spend in the proactive planning process.

Ingram (1985) notes, in referring to the strategic planning process, that it is a survival skill for educational leaders, and therefore, should dominate the time and attention of school board members, superintendents, and top managers in all school districts. Strategic planning is a powerful tool because it embodies an integrated set of actions that can improve an organization's well-being and strength, relative to its competitors.

The superintendent, as chief executive officer, must assume major responsibility for planning efforts. To be effective in this role, the superintendent must have a broad perspective of the external environment, an understanding of planning models and processes, and understanding and skill in human relations. Duckworth and Kranyik (1984) also see proactive planning as a survival skill:

> The public education community has an opportunity to create a bright, new future for the schools of this nation in the next decade. New technology, new ways of organizing schools and motivating teachers, and more favorable economic and social conditions will help make a quantum leap ahead possible in a social institution characterized by limited responsiveness to new conditions. Computer-based telecommunications will revolutionize teaching and learning in

> many aspects of the curriculum. The application of new human resources concepts concerned with such areas as reward systems, career opportunities, and job redefinition, greatly enhance the impact of teachers, as well as the teaching profession. The improving economy will provide a market for better educated youth, most of whom will be employed in some aspect of the "knowledge" industry.
>
> The greatest challenge facing the schools will be the need to move from existing curricula, structures, and societal relationships to new forms that will secure the role of public education in America in the decades to come. Clearly, a proactive stance toward the future is an essential ingredient in this effort.

A proactive leader who is responsible for districts and schools to flourish in the future is a master of change (Kanter, 1983). This leader must be adept at introducing new procedures and new possibilities as organizations become more responsible to external pressures. This person encourages and listens to new ideas from inside the organization, and tends to focus more on what is not known than on trying to control the known. The proactive leader is able to rearrange the known, remove barriers before an external crisis develops, and then steer the organization by a deliberate and conscious articulation of a direction, enhanced by the drive to continuously integrate and interconnect.

Strategic planning is a matter of spirit, energy, and vision that makes up the tool kit of the proactive educational leader. Therefore, the proactive leader is less interested in developing a step-by-step rational plan that focuses on the past and the present and is more interested in "[managing] a set of guiding principles that can help people understand not how it should be done but how to understand what might fit the situation they are in" (Kanter, 1983). In essence, the proactive leader

plans the organization's future now by creating larger visions and engaging people's imaginations in pursuit of those visions.

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