SUSTAINABLE STRATEGY [A]

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SUSTAINABLE STRATEGY

GREAT START
What *are* we doing now?

1. Get Set

> It's amazing what ordinary people can do
> if they set out without preconceived notions.
> Charles F. Kettering

First Who

Choosing who will participate in strategic management decisions is a critical matter. Half of all decisions in organizations fail primarily because people "impose solutions, limit the search for alternatives, and use power to implement their plans."[1] Paul Nutt suggests that the leader "make the need for action clear at the outset, set objectives, carry out an unrestricted search for solutions, and get key people to participate."[2] **But which key people?**

Some boards, like smaller all-volunteer agencies, will obviously be very involved. Other boards with full-time staff may participate less. Some experts say "those who carry out strategy must also make it."[3] If the staff who will implement the strategy are missing from the room, you are doomed for failure. So, should the marketing director be in the room, the development officer? Or should you use a small, behind-the-scenes group of executive leadership to take the role?

The degree of involvement is fluid and depends upon a host of variables including the experience of the executive, the amount and depth of staff, and resources available. A grassroots organization with a budget of less than $100,000 and no full-time professional staff will answer the five questions differently than a $10 million foundation.

Some people use the need for acceptance and quality of decision as key factors in deciding who should be involved. Gary Yukl's modification of Victor Vroom and Phillip Yetton's model[4] has two variables – the decision quality and subordinate acceptance – and three decision making styles – directive, consultative, and group.

Generally simplified, if subordinates' acceptance is not important or everyone will agree with whatever you decide, you make the decision. If you need acceptance and the decision quality isn't quite as important, delegate the decision to the group. If you need acceptance and the decision quality is important, consult the group, but make the decision yourself.[5]

When it comes to directive versus participative, some people argue that the latter is the only way to go. Indeed, many nonprofit leaders avoid directive (also called autocratic) decision making on principal.[6] Wilfred Drath for example condemns the lone hero directive style, but he recognizes the difficulties of participative approaches, including

the limitations of too many chefs in the kitchen and diffused accountability.[7] As the Chinese proverb goes, "A courtyard common to all will be swept by no one."

Not everyone thinks that participative approach is best in all situations. Gary Yukl, for example, warns that the lack of "consistent results about the effectiveness of participative leadership probably means that various forms of participation are effective in some situations but not in others."[8] Recognizing this explicitly is Henry Mintzberg who says that in times of crisis, people not only expect directive leadership, but demand it. Because the organization "must respond quickly and in an integrated fashion, it turns to its leader for direction."[9]

John Kotter and Leonard Schlesinger also use time as the key variable when offering their continuum that goes from "a very rapid implementation, a clear plan of action, and little involvement of others [to] a much slower change process, a less clear plan, and involvement on the part of many people other than the change initiators."[10] The bottom line is that **if you need lots of acceptance, go slower, if you don't need it, go as fast as you want.**

Equally important to the steps are the conditions for a successful planning process that Allison and Kaye advocate. These factors are affinity grouped in the table below:

Allison and Kaye's Specific Conditions[11]	Affinity Groups
• Commitment, support, and involvement of top leadership, especially the executive director and board president. • Commitment of organizational resources to complete the planning process as designed (including time of staff and board members, money for consultants, and needed research). • Commitment to tying the strategic planning process to the organization's annual planning and budgeting process.	Commitment
• Commitment to clarifying the roles of all participants in the planning process, including clarity about who will have input into the plan and who will be the decision makers. • Balanced mix of individuals on the planning committee, from big-picture visionaries to a detail-oriented thinkers group that is committed to full participation and is likely to be able to work well together (including the ability to disagree with each other). • Willingness to encourage participation of board, staff, and as appropriate, external stakeholders. • Board and staff who understand the purpose of planning and are clear about the desired process outcomes and issues to be addressed. • No serious conflict exists between key players with the organization.	Team

Allison and Kaye's Specific Conditions[11]	Affinity Groups
• A willingness to question the status quo and look at new ways of doing things, along with a willingness to ask the hard questions and face difficult choices. • Board and top management are willing to articulate constraints and non-negotiable issues up front.	Trust
• No high-impact decision (e.g. a major funding or policy decision is about to be made by an external source) that would dramatically change the course of the organization. • Organization is not in the middle of merger discussions.	Timing

2. Purpose

> He who has a why to live for
> can bear almost any how.
> – Nietzsche

Purpose is who you are. It has two elements: values and mission.

There are many top managers and leaders in organizations who honestly believe that the key motivator in the workplace is pay. You may know some of these people. They say, "I remember when a person got a dollar for a dollar's work" or "My paycheck is enough motivation." However, while money is a consideration, it is not as important for many. Daniel Pink, for example, says that it takes three things to motivate people in the workplace: "(1) *Autonomy* – the desire to direct our own lives; (2) *Mastery*: the urge to get better and better at something that matters; and (3) *Purpose* – the yearning to do what we do in service of something larger than ourselves."[12]

What we may miss in all this is the obvious fact that purpose-driven people need a purpose. They need to have it reinforced on a regular basis. Most certainly, when you recruit new employees to the agency, you need to be clear about the agency's purpose.

Purpose contains two distinct elements. The first is the values and seeable behaviors that guide conduct. The second is the mission that addresses customers, the difference they experience in their lives, and how the organization is different from its rivals.

Values

Values guide your conduct. They are the talk that you walk, they are how you do the work.

Walking your talk – living your values – is akin to authenticity, which means "owning one's personal experiences, be they thoughts, emotions, needs, wants, preferences, or beliefs."[13] Other descriptions of authenticity include "genuine, reliable, trustworthy, real, and veritable"[14] and "to know, accept, and be true to one's self . . . they know who they are, what they believe and value, and they act upon those values and beliefs while transparently interacting with others."[15]

Fred Luthans and Bruce Avolio observe that authentic managers "lead from the front, going in advance of others when there is risk for doing so . . . Such 'walking the talk' has been shown to be much more effective in influencing others than coercing or persuading."[16] Indeed, trust and performance are significantly related[17] and an important source of competitive advantage.[18] James Kouzes and Barry Posner make use of the phrase *model the way* and state, "Exemplary leaders go first. They go first by setting the example through daily actions that demonstrate they are deeply committed to their beliefs."[19]

Your talk ultimately refers to your values, which are like your car in that no matter where you are, what road you're on, where you're heading, or who's in the car with you, the car stays the same. Jim Collins and Jerry Porras define values in their best-selling *Built to Last* as the "organization's essential and enduring tenets, not to be compromised for financial gain or short-term expediency."[20]

Why should you care about having a clear set of values?

First, how can you test your actions against your values or those of your organization when you don't know what they are in the first place? How can you "walk your talk" if you don't know what the talk should be? How can you "lead by example" if you don't know the example you are trying to set?

Many conflicts between people occur because of value clashes. These differences not only happen with customers and clients, but also with employees and family members. It is all about the assumptions we make. I assume that my seventeen-year-old son has the very same perspective I have when it comes to taking responsibility. I assume that our marketing director shares my dedication to serving school audiences when, in fact, she may be dedicated to the customer who pays big bucks for a seat to the latest blockbuster, not the kids who come for free.

In reality, most of us have "values defaults" just like the word processing programs we use. I use margins set at one inch, Ariel font set at 12 point with page numbers at the top right. Anyone that uses my computer will get this document format because it is set as my default. Just like my monitor settings, I have particular values that govern my behavior. These values are mine and mine alone, not yours, not my organization. In the absence of direction from the organization, employees, volunteers, and board members will default to their particular values. Explicitly outlining values gives rise to the possibility that these people will adapt them, especially if leaders at the top model these beliefs.

Expecting people to know your values without espousing them is values by clairvoyance. This assumes that you know what my values are, that you respect my values, and that you care about them. Leadership frequently falls into this trap. They seem to believe that others can read their minds when it comes to their beliefs and preferences; that others should know that lending a hand without asking is important

and you should do it. It just doesn't work this way. Employees are not mind readers. If the leaders of the nonprofit organization want certain values embraced in the workplace, they need to spell it out explicitly, promote it throughout the organization, model it themselves, and take action if people are not observing them.

The challenge to values is that people frequently give them lip service as a fad of the day. You'll come into the office one day and find that a manager has put up a framed picture of an eagle soaring in the mountains with a pithy saying about teams. That's not the same as clear and concretely articulated values.

Second, organizational values often contain your competitive advantage, which is what makes you different from your rivals. The important things to people in organizations likely are matters of the heart and these often give you the edge in an increasingly competitive nonprofit environment. If making your clients healthy is the hill you will die on, as the saying goes, consider it a value; it is an enduring tenet of how you do business and "not to be compromised for financial gain or short-term expediency."[21]

Third, because organizational values are so important to people, they offer you an immediate tool to judge the appropriateness of everything you do. A faith-based organization that believes in the sanctity of their house of worship may want to reconsider teen-night films with R ratings in the church basement.

Most organizations will have a good idea of the values that should govern behavior. But many do not specify the "seeable in action" behaviors that bring those values to life. This is a shame because most people have different things in mind when hearing a value like "trustworthy". For one person, trustworthy means keeping your promises; another will say telling the truth.

Clarifying values at the organization level is the first step in building the purpose. Making values even stronger is the addition of behaviors, which is uncommon in most planning protocols. By doing this, you have the chance to make expectations about behavior clear when recruiting new staff members, onboarding them effectively, and then managing performance. The table below lists organizational values and behaviors in action for an agency. The team generating these ideas and results did so in about 30 minutes using the BAM process (brainstorming, affinity grouping, and multi-voting) shown in Appendix A:

Ideas	Results

• collaboration, team players
• optimistic, excited, well-intentioned, positive, enthusiastic, energetic
• cooperative
• good communicators, open, effective communication, shared goals, share information, diverse, flexible
	1. Collaborative
	  a. Optimistic
	
	  b. Cooperative
	  c. Effective communicators

Ideas	Results
• Customer-centered, service-oriented, user-friendly, community-oriented, concern for community, customer focused, asset to nonprofits	2. Customer-centered
• respectful, show you care, truthful	a. Respectful
• responsive to needs, attentive, listen to customer, timely	b. Responsive
• above and beyond, solution-driven, asking, solve problems, value adding, provide quality, provide added quality	c. Solution-driven
• professional, quality, competent, excellence	3. Professional
• results-driven, execute effectively, have standards, results-oriented, provide value	a. Results-driven
• thorough, dedicated, committed, hard work, loyal to mission	b. Dedicated
• knowledge-based and experienced, resourceful, works with knowledge, committed to evidence-based practice, knowledgeable, know the business	c. Fact-based
• accountable for actions, integrity, trustworthy	4. Trustworthy
• fair, consistent, objective	a. Fair
• transparency, sharing information, positive, negative feedback, make problems known, honest	b. Transparent
• keep confidences, straightforward, keep commitments, above board, keep word	c. Promise keepers

GREAT IDEAS
What *could* we do next?

4. Vision Statement

> Vision is the art of seeing the invisible.
> Jonathan Swift

Many writers in popular literature have long argued that vision is essential for effective leadership.[22] Says Peter Senge, it is "a force in people's hearts, a force of impressive power."[23] Scholars also give an equally strong vote of confidence to its importance.[24] As such it is now generally accepted that the "single defining quality of leaders is the capacity to create and realize a vision."[25] In other words, "leadership behavior that is not infused with vision is not truly leadership."[26]

The news that vision is the "essential *leadership* act"[27] would be cause for celebration if there were agreement on what it actually is. Gary Yukl says that vision is "a term used with many different meanings, and there is widespread confusion about it."[28] Multiple studies show that leaders have visions that vary widely from vague to concrete.[29]

Some like John Kotter define vision quite broadly as "a picture of the future."[30] Others like Henry Mintzberg take the view that it is simply strategy expanded:

> Vision sets the broad outlines of a strategy, while leaving the specific details to be worked out. In other words, the broad perspective may be deliberate but the specific positions can emerge. So when the unexpected happens, assuming the vision is sufficiently robust, the organization can adapt.[31]

Making sense of the differences are Jill Strange and Michael Mumford who reviewed a host of definitions and found the commonality that "vision may be conceived of a set of beliefs about how people should act, and interact, to attain some idealized future."[32] As Burt Nanus eloquently puts it, "vision always deals with the future. Indeed, vision is where tomorrow begins."[33] Put in the context of sustainable strategy, **your purpose is present tense – who you are; your vision is future tense – this is where you're going.**

Just how important is vision? According to John Kotter, underestimating the power of vision is one of the top three reasons why transformation efforts fail.[34] For Henry Mintzberg, "vision – expressed even in imagery, or metaphorically – may prove a greater incentive to action than a plan that is formally detailed, simply because it may be more attractive and less constraining."[35]

Leaders of organizations are paying attention. In 1989, 1,500 leaders from 20 different counties including 860 CEOs agreed that vision was crucial to success.[36] Popular writers then amplified the importance of vision, and by the mid-1990s, all top executives had visions of one sort or another.[37] The position that vision is essential has not abated

in the new millennium.[38] In 2003, vision was the third most popular management tool used by 84 percent of the respondents from 708 companies on five continents. In 2011, vision remained a top three contender.[39]

Yet, not everyone is convinced of the power of vision. The venerable *Bass & Stogdill's Handbook of Leadership* barely makes note of vision in its 1,182 pages.[40] A study of 1,400 Australian public sector employees indicated, "articulating a vision does not always have a positive influence on followers."[41] Research on the Israeli Defense Forces show that a leader's vision is "not positively related to subordinate identification and trust, self-efficacy, and motivation and willingness to sacrifice."[42]

Even so, for many highly regarded practitioners, vision is specific enough to have a direct impact on the day-to-day efforts in the workplace:

> "A vision gives you a focal point . . . It tells people what's expected of them." Frederick Smith, Founder, Chairman, President, and CEO, FedEx

> "A vision provides a framework through which you view everything that goes on in the company and in the external environment." Raymond Gilmartin, former CEO, Merck & Co[43]

The vision referred to by these deans of corporate America is valuable "because an organization needs to know where it wants to be in order to act in a reasonably efficient manner to get there."[44] Experts define organizational aspirations by the drive to yield specific results.[45] This includes Ronald Heifetz's adaptive work where "a vision must track the contours of reality; it has to have accuracy, and not simply imagination and appeal."[46]

One common type of vision elevates the organization to someplace new.[47] It is "a new story, one not known to most individuals before."[48] Defined by idealism, these visions are "transcendent in the sense that they are ideological rather than pragmatic, and are laden with moral overtones."[49] These are the kind of visions that Walt Disney refers to in his often-quoted mantra, "If you can dream it, you can do it".[50]

Another common type of vision has an operational texture similar to formal planning, which "seems better suited to the tranquilities of peacetime than the disruptiveness of war, especially unforeseen war."[51] The visions that yield practical results are the type that Paul Valery referred to when he said, "The best way to make your dreams come true is to wake up."[52]

In all of this confusion, however, patterns develop. Scholar Gary Yukl developed a list of desirable characteristics from well-known experts. By grouping these characteristics around common themes, two major types of vision emerge:

Characteristics	Types
simple and idealistic; simple enough to be communicated clearly in five minutes or less; a picture of a desirable future; not a complex plan with quantitative objectives and detailed action steps; appeals to values, hopes, and ideals; emphasizes distant ideological objectives	Idealistic
challenging, but realistic; not wishful fantasy; an attainable future grounded in the present reality, addresses basic assumptions about what is important for the organization; focused enough to guide decisions and actions; general enough to allow initiative and creativity	Pragmatic

The belief that there are two primary types of vision is widespread among practitioners. Alan Guskin, former Chancellor of Antioch University, takes this point of view:

I believe that one must be both idealistic and pragmatic. For, to be idealistic without being pragmatic leads to frustrated aspirations and unfulfilled promise; to be pragmatic without being idealistic leads one to be a hack and a bureaucrat. Being both idealistic and pragmatic leads to hope and optimism along with being realistic and focused.[53]

This paradoxical blend is also prevalent in strategic literature. For example, Glenn Rowe argues that strategic leaders show a "synergistic combination of managerial [pragmatic] and visionary leadership [idealistic]."[54] This is also consistent with Jim Collins and Jerry Porras' view that vision "consists of two parts: a 10-to-30 audacious goal plus vivid descriptions of what it will be like to achieve the goal."[55]

In summary, the vision statement is an overarching picture of the future while the vision strategies articulate how you're going make that future happen.

Sustainable strategy splits the vision into three elements:

1. The vision statement that is a clear picture of the future and is typically idealistic in texture. The vision statement usually has a three to five year timeframe give or take.
2. The vision strategies bring the picture to life and are typically pragmatic. Vision strategies usually have a shorter timeframe of one to two years.
3. The vision goals for each strategy have a timeframe of no more than a year. These goals become part of the operating plan.

In sum, the vision statement tells you what direction you're heading in; the vision strategies provide specific directions, and the vision goals tell how you will make progress towards achieving the strategies in the shorter term.

Like it or not, making a vision statement requires that you "*see* and *feel* . . . it requires a mental capacity for synthesis."[56] It is not so much a deductive process as it is an art. Sometimes you will find the vision statement in just one idea out of the dozens you generated. Sometimes you will step back and see a theme emerge from all of the ideas – the "**shared picture of the future**."[57]

Thinking back to the types of visions, you will recall that visions are often idealistic or pragmatic. Here are four **idealistic** vision statements:

- Be the best practice nationally that delivers comprehensive solutions
- To the next level of excellence through creativity and leadership
- The best of all
- Iconographic

Here are four **pragmatic** ones:

- Stabilize the core with diversified funding sources
- Consolidate operations to prepare for the next level
- Make effectiveness count
- More funding – more advocates

The **first step is to gather together all of your information** from the six tools: Stakeholders, Contexts, BOBs, Great Questions, Stop Fix, and BAM. Usually you do this immediately following the BAM using post-it notes.

Second, look for dominant themes by reviewing what you learned from the ideation tools. As you review the work, are there any prevailing ideas that arise? Perhaps you see a pattern of fixing things to ready your agency for the next level? Maybe you're actually at a point of going to that level?

A particularly good place to look for themes is the affinity-grouped BAM ideas. It could be that one or two of your affinity groups form the vision statement, or that there is a wild card within all of the ideas that adds up to the vision. For example, out of more than 60 ideas to the question of "what takes us forward," a housing agency focused on just one idea for its vision statement: *to be the model for fair housing*.

Third, ideate specifically for the vision statement. Come up with ideas to fill in the blanks for the following:

- In three years, our agency will be _____.
- We want to become _____ in three years.
- The difference between our agency today and three years from now will be _____.

Fourth, polish your best candidates and put them into statements of *no more than five words* give or take and make sure each has a definite *future tense*.

Fifth, test each statement against the following checklist from Jim Collins and Jerry Porras:

- Does it stimulate forward progress?
- Does it create momentum?
- Does it get people going?
- Does it get people's juices flowing?
- Do they find it stimulating, exciting, adventurous?
- Are they willing to throw their creative talents and human energies into it?[58]

Finally, if you're not satisfied with your choices, start over. If you are satisfied, choose the best one and move forward to your vision ideas. By no means should you discard any of the information you've collected – you will use it all shortly.

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ENDNOTES

[1] (Nutt, 1999, p. 75)

[2] (Nutt, 1999, p. 75)

[3] (Beinhocker & Kaplan, 2002, p. 53 bolded as written)

[4] (Vroom & Yetton, 1973)

[5] (Yukl, 2010, p. 98)

[6] (Meehan & Arrick, 2004; Reinelt, Foster, & Sullivan, 2002)

[7] (Drath, 1996)

[8] (Yukl, 2010, p. 116)

[9] (Mintzberg, 1983, p. 141)

[10] (Kotter, 1999, p. 45)

[11] (Allison & Kaye, 2015, pp. 32-33)

[12] (Pink, 2009, p. 204)

[13] (Harter, 2002, p. 382)

[14] (Luthans & Avolio, 2003, p. 242 italics removed)

[15] (Avolio, Gardner, Walumbwa, Luthans, & May, 2004, p. 802)

[16] (Luthans & Avolio, 2003, pp. 248-249)

[17] (Davis, Schoorman, Mayer, & Tan, 2000)

[18] (Huff & Kelley, 2003)

[19] (Kouzes & Posner, 2002, p. 14)

[20] (J. C. Collins & Porras, 1994, p. 73)

[21] (J. C. Collins & Porras, 1994, p. 73)

[22] (Bennis & Nanus, 1997, p. 17; J. Collins & Porras, 1991, p. 30; Covey, 1989, p. 101; De Pree, 1989, p. 9; Kotter, 1990, p. 5; Kouzes & Posner, 1995, p. 95; Senge, 1990, p. 206)

[23] (Senge, 2006, p. 192)

[24] (Berson, Shamir, Avolio, & Popper, 2001, p. 54; Conger, 1989, p. 29; J. W. Gardner, 1990, p. 130; Sashkin, 1995, p. 403; Tichy & Devanna, 1986, p. 28)

[25] (Bennis, 1989, p. 194)

[26] (Vaill, 2002, p. 18)

[27] (Vaill, 2002, p. 28)

[28] (Yukl, 2002, p. 283)

[29] (Bennis & Nanus, 1997; Larwood, Falbe, Miesing, & Kriger, 1995)

[30] (Kotter, 1990, p. 68)

[31] (Mintzberg, 1994, pp. 209-210)

[32] (Strange & Mumford, 2002, p. 344)

[33] (Nanus, 1992, pp. 8-9)

[34] (Kotter, 1990)

[35] (Mintzberg, 1994, p. 293)

[36] (Korn, 1989, p. 157)

[37] (Kotter, 1996; Larwood et al., 1995; Nanus, 1992)

[38] (Bennis & Thomas, 2002)

[39] (Rigby & Bilodeau, 2011)

[40] (Bass & Stogdill, 1990)

[41] (Rafferty & Griffin, 2004, p. 348)

[42] (Shamir, Zakay, Breinin, & Popper, 1998, p. 400)

[43] ("All in a day's work," 2001, p. 58)

[44] (Tichy & Cohen, 1997, p. 173)

[45] (Bennis & Nanus, 1997; Crosby, 1979, p. 66; Kotter, 2000; Tichy & Cohen, 1997, p. 173; Wheatley, 1999, p. 95)

[46] (Heifetz, 1994, p. 24)

[47] (Conger, 1989, p. 38; Kouzes & Posner, 1995, p. 119; Senge, 1990, p. 208)

[48] (H. Gardner & Laskin, 1995, p. 11)

[49] (House & Shamir, 1993, p. 97)

[50] ("BrainyQuote," 2001-2014)

[51] (Mintzberg, 1994, p. 115)
[52] ("BrainyQuote," 2001-2014)
[53] (Guskin, 1997, bolding added)
[54] (Rowe, 2001, p. 82)
[55] (J. C. Collins & Porras, 1996, p. 73)
[56] (Mintzberg, 1994, pp. 270-272)
[57] (Senge, 1990, pp. 9, bolding added)
[58] (J. C. Collins & Porras, 1994, pp. 95-96)