

Strategic Planning Revisited: A Futures Perspective

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Brief Biography

Maree Conway has worked in Australian universities and colleges for over 20 years, and has recently taken up the position of General Manager, Planning, Quality and Information at Victoria University in Melbourne, Australia. Before that Maree was Director, Foresight, Planning and Review and Director, External Submissions at Swinburne University of Technology, also in Melbourne. Maree holds a Bachelor of Arts in Media Studies, a Masters in Educational Administration (Honours) and is currently enrolled in the Masters in Strategic Foresight at Swinburne. Her expertise is in organisational planning and review and, in particular, in reframing organisational and individual paradigms to enable improved performance.

Abstract

Traditional strategic planning processes involve a large amount of money, time and effort, yet often fail to live up to expectations. Recent literature emphasising implementation as the crucial element of successful strategy suggests that 'bad' implementation can be a cause of failure, rather than the process of developing strategy itself. A futures perspective on planning suggests that the process for developing strategy and associated plans is a success factor which is overlooked. Many organisations lack a systematic approach to developing an understanding of future options to underpin strategy development. Instead, strategy is based primarily on information about the past and present. By re-conceptualising the strategic planning process as a broader, three stage model of thinking, decision making and implementation, it is possible to find a 'home' for thinking about the future in strategy development. This paper explores how futures approaches might be used routinely in traditional strategy development and planning processes in order to better prepare organisations for the uncertainty of the future.

Caveat

This paper emerges from the experience of the author as a planning practitioner in Australian universities. As such, it is based on a predominantly western approach to planning, and may not be inclusive of all practices and approaches in all countries. Similarly, for simplicity, the paper refers to a generic strategic planning model. It is recognised that there are many models and variations in organisations, but all generally include similar elements which can be grouped together under the headings of strategy development, decision making and implementation.

Introduction

Strategic planning is about developing a plan to implement strategy. It is not about planning strategically. As Mintzberg suggest, ‘strategic planning’ might well be an oxymoron (Mintzberg, 1994:5). The need for organisations to plan and monitor their activities in order to focus resources and efforts to ensure future survival has spawned an industry of practitioners, consultants and education programs. Planning practitioners have their own professional associations and have assumed a critical information role in organisations. Consultants sell a wide range of strategic planning approaches and tools, and strategic planning is a core component in university business courses.

Strategic planning is now a routine part of business, with an accompanying set of beliefs and protocols that underpin day-to-day practice. Yet, as Mintzberg (1994:5) indicates, ‘planning lacks a clear definition of its own place in organizations’. While the need to plan is accepted, the resulting plans are often not successful in driving implementation of organisational strategy. Indeed, ‘while the need for planning has never been greater, the relevance of most of today’s planning systems and tools is increasingly marginal’ (Fuller, 2003:2).

Traditional strategic planning models are increasingly viewed as not producing strategy that can deal with complexity, uncertainty and rapid change in the external environment. The apparent failure of corporate strategy even after extensive planning, and the inability of many organisations to read signals of change in the external environment, suggests that there is something missing from existing planning models. ‘It may well be that the typical strategic planning exercise now conducted on a regular and formal basis and infused with quantitative data misses the essence of the concept of strategy and what is involved in thinking strategically’ (Sidorowicz, 2000).

There is now some recognition that this missing element is the capacity of an organisation to systematically develop and maintain a shared view of the future – a foresight capacity. Scenario planning is often promoted as the way to incorporate a futures view into planning, and has been used by organisations and governments with varying degrees of success since the 1960s. While using a methodology such as scenario planning introduces organisations to the value of exploring the future, it does little to embed a more comprehensive futures approach into strategy development, decision making and implementation – that is, to develop and sustain an organisational capacity for foresight.

The development of strategy involves three stages: strategic thinking, decision making and planning - that is, *thinking* about future strategy options, *deciding* on options, and *implementing* those options. But, current definitions generally regard ‘strategic planning’ as subsuming all three stages. The line between the three stages is therefore blurred, as Mintzberg (1994: 32) indicates:

A major assumption of the strategic planning literature ... is that all of these terms necessarily go together. Strategy development is a planning process, designed or supported by planners, to plan in order to produce plans.

Traditional planning models tend to focus on processes run by planners to develop and implement plans. Such processes often include words about the future, with an underlying assumption that the existence of a plan will be proof that the future has indeed been considered. While there is much information about the past and the present, however, there is little information about the future – that is, there are no future ‘facts’. What usually happens, then, is that consideration of the future in current planning models is based on extrapolations of the past and the present, without any systematic exploration by the whole organisation of what *might* happen.

With such a focus on documentation and implementation, consideration of future options as an input into formulating strategy does not occur in any systematic way over time.

Understanding the future is therefore the least understood or analysed element of strategy development, even though strategy is being developed to allow the organisation to survive and grow into that future.

Futures approaches naturally 'belong' to the *thinking* stage of strategy development and implementation, but this only becomes apparent when strategic thinking, strategic decision making and strategic planning are defined as separate, but interrelated and overlapping domains. Creating this separation also addresses Mintzberg's (1994:2) concern about the place of strategic planning in organisations by placing some boundaries around the elements of the process, and further clarifies the role and purpose of 'planning' as a distinct and valuable activity.

Integrating a futures approach into traditional strategic planning models in order to develop an organisational foresight capacity requires not only a understanding of what a futures approach is – as opposed to only using a methodology such as scenario planning – but also a fundamental re-conceptualisation of the strategic planning model itself. This paper explores that re-conceptualisation in order to develop a planning model that includes thinking about the future as an integral element.

Planning and Strategy

The relationship between strategy and planning is complex and interdependent, but few works on strategic planning explore this relationship in any depth. Most strategic planning models assume that strategy making is just one step in a well understood planning process, which results in the production of written plans that are then implemented by staff across an organisation. The purpose and role of each stage in the strategy development process is, however, not clear.

Understanding strategy development is important because organisations are at risk if strategy fails or does not take into account signals about changes in the external environment.

Mintzberg (1994:2) describes how strategy is defined in a number of ways by different planning schools: as a plan; a pattern; position; perspective; or ploy. Hodgson defines strategy for an organisation as ‘the way the leaders of that organisation fulfil its mission in the environment in which they find themselves’. He goes on to say that ‘the environment includes all kinds of factors that need to be taken into account – technical, social, political and ecological – as well as the future, since missions have to be carried out over long periods of time’ (Hodgson, 2004). Van der Heijden states that ‘strategy is about the future, and therefore involves uncertainty’ (Van der Heijden, 1994:8).

Strategy emerging from traditional planning processes is often vulnerable to rapid and unforeseen changes in the external environment, with organisations unprepared to deal with those changes. The resulting crisis management approach suggests that there is, in reality, little scrutiny of the future and its potential impacts on those organisations, and little consideration of how the organisation might need to respond to future challenges before those challenges eventuate.

Hodgson (2004) suggests that without such explorations of the future to deal with uncertainties, strategic planning creates a default scenario: ‘a future that validates the plan and this view of the future dominates ... decision making’. This is generally a satisfactory state of affairs until discontinuities and unexpected events in the external environment undermine the plan. Hodgson (2004) writes that ‘we have to give new meaning to strategy’ which, this paper argues, needs to start with re-conceptualising the current strategic planning model to better understand how strategy development occurs, and how the future can be taken into account in that process.

Why the Future?

Organisations today exist in environments that are changing rapidly and increasing in complexity. Traditional methods of interpreting and understanding those environments work well when the world is relatively stable, since futures can be extrapolated with relative certainty. The plan built around a default scenario is the result of those processes. When the default scenario fails, however, an organisation tends to enter crisis mode and becomes reactive. Thinking more systematically about the future, and planning to deal with possible changes in the external environment means that an organisation will be better prepared to adapt to change as it occurs, because it will have already have considered and agreed on alternative strategies to use.

As already discussed, the term ‘future’ often appears in definitions and planning manuals. There is, however, little commensurate discussion of how the future can be systematically explored, or what tools or methods to use, so that the output can inform the development of a range of future options or choices, rather than a default scenario. Existing approaches describe the need for plans to be flexible to deal with future change, but that flexibility seems to be defined only as ensuring the plan can be re-written quickly to deal with unexpected external events. The idea that a plan could include an assessment of what such unexpected events might be, what information the organisation needs to be able to judge when those events might be appearing on the horizon, how the organisation might respond strategically, and incorporating alternative strategies into the plan from the beginning, is not part of the traditional strategic planning worldview.

Mintzberg (1994:7), however, indicated that describing planning as thinking about the future is a problem because ‘it cannot be bounded. What organisational activity, no matter how short-term or reactive, does not take the future into account?’ But, he then attributes the same argument to understanding planning itself: ‘one problem ... has been the unwillingness by the proponents of planning to bound the concept at all’ (Mintzberg, 1994:2). His boundary issue

reflects the need to better understand the strategy development process, and acknowledging that strategy development does not equal planning.

Current Planning Models

Most organisational planning models are remarkably similar, involving stages such as:

- planning – researching and analysing strategy and plans,
- documenting – documenting plans,
- implementing and monitoring – taking action to achieve the agreed goals, and monitoring progress or non-achievement in order to adapt strategy.

Many guidelines talk about developing a long term view (eg HEFCE, 2000; FIU 2000) but there is usually no indication about how that view should be developed, or just how long a ‘long term’ view is.

HEFCE (2000:17) point out the need for frequent review of a university’s direction because ‘unforeseen changes in the internal and external environment are inevitable and may require the objectives to be revised’, advising institutions that ‘there is no virtue in sticking doggedly to a plan which has been overtaken by events. It is essential for all institutions to retain the flexibility to adjust as circumstances change, so that they can exploit unexpected opportunities and respond to unforeseen threats’. *That is, be prepared to change your plan if something unexpected happens, not prepare for the unexpected during your planning process.*

Even when an organisation states that it is identifying a desired future, there is no systematic exploration of that future:

‘We are starting by building on the University goals, philosophies, themes and challenges identified during the **past decade**. This approach maximises our ability to collect and analyze data, generate insights concerning the **current environment** of the University, and identify issues facing the University of the 21st century ... these

insights will provide the basis for decisions concerning the **future goals** of the University' (FIU, 2000) (emphasis added).

This process is data driven, but the data is about the past and present, not the future. Issues identified as likely to affect the university in the 21st century are derived not from an exploration of what might happen in the future, but from data about what has happened and what is happening. Decisions about the future of this university are therefore being made on analysis of the past and present.

Such approaches are understandable, given current mindsets and the focus on evidence- or data-based decision making. Since there are no future facts – that is, facts that can be reduced to data - there can be no *data* collection about the future, so the authority of the past and the present is dominant. The emphasis on *quantitative data* to make strategy decisions assumes that, following analysis, a single interpretation and a single future is possible. The result is the desired, preferred, or default future on which the organisation is effectively 'betting the farm'.

It is possible for strategy to be based on a more integrated view of the past, present and future, but current definitions of what constitutes valuable 'data' will first need to change. Valuing primarily quantitative data negates, for example, knowledge held by staff about the organisation and its internal and external environments. Staff are generally *consulted* about draft plans, but they do not generally *participate* in the development of those plans by providing formal input about their views of possible organisational futures. Given that staff ultimately implement plans – and can obstruct that implementation - this omission is notable.

Additionally, even though external environmental scanning is often part of the planning process, and is documented, that scanning is usually limited to mainstream trends and what is already known. A fundamental knowledge management tenet suggests that we do not know what we do not know, so scanning needs to also look to the periphery, at emerging trends, at the sometimes weird and wacky. Environment scanning therefore needs to incorporate

scanning past, present and future environments, and tools and methods to facilitate that scanning need to be identified. Maintaining a scanning function over time – rather than as a once-off activity when strategy is being developed – allows the relevance of such emerging trends to be confirmed or discounted. The combination of peripheral and mainstream scanning strengthens decision making about strategy.

Wilson's premise that 'all our decisions are about the future, but all our knowledge is about the past' (Wilson, 2000) demonstrates that the strong focus on the past and present to determine future strategy is tenuous. It seems obvious that consideration of the future, as well as the past and present, is an essential part of the planning process. Slaughter (2004:183-4) suggests, however, that even when organisations do open up their processes to include futures approaches and methods, "it remains the case that corporate approaches to futures tend to be epistemologically and ideologically naïve, take, for example, a particular corporate or cultural ideology as 'given' and missing altogether the many options for critical analysis and re-conceptualization upon which lasting innovations may depend'.

Recognising the need to consider the future has only really become apparent as the external environment during the last quarter of the 20th century has become more volatile and uncertain. Traditional strategic planning processes are already equipped to analyse and understand the past and the present, which is essential since such understanding provides the foundation for understanding the future. As Bell (2000) points out, "the action that takes place in the present is what shapes the future" and, 'understanding the present allows people to attain an orienting perspective to provide a basis for moving forward'. While understanding the present requires knowledge of the past, however, it must also be connected with the future:

'There are two processes that are centrally involved in constructing the present: one is the interpretation of past experience; the other is the anticipation of possible futures. The two processes are not in opposition ... They are mutually reinforcing.' (Slaughter, 2000).

Exploring what *might* happen is critical when faced with the uncertainty of the future, is then as critical as exploring what has happened and what is happening. Current processes, however, are focused around only the past and present and do not provide approaches, tools or methods required to understand the future. The challenge for planners today, then, is not only to maintain this focus on past and present, but also to integrate a distinct futures stage into existing planning processes. This challenge is being addressed in some organisations but, at least in universities, Slaughter's statement that "late 20th century strategic planning has given way to what is now more commonly termed strategic foresight" (Slaughter, 2004:19) is somewhat optimistic.

The Emergence of Strategic Foresight

Strategic foresight is 'the ability to create and maintain a high quality, coherent and functional forward view, and to use the insights arising in organisationally useful ways' (Slaughter, 1999:287), with such a shared forward view enabling an organisation to detect adverse conditions, guide policy, shape strategy, and explore new markets, products and services. As already discussed, the traditional strategic planning model often includes words about the future in its process, but the development of strategic foresight as an integral and critical step in that process in order to develop a better understanding of the future has not yet been achieved. That is, the need to develop strategic foresight as a core organisational capacity and to build that capacity over time has not been recognised.

One way to move strategic planning towards strategic foresight is to re-conceptualise the traditional planning model as a process consisting of three stages:

- strategic thinking
- strategic decision making
- strategic planning

The basic differences among strategic thinking, decision making and planning are at the heart of this model. Mintzberg (1994a) indicates that *strategic planning* is about taking an articulated goal and turning it into formal, documented action steps that can be implemented to achieve agreed results. This sort of activity requires thinking which is analytical, logical, pragmatic and deductive to make sure that actions are implemented, monitored and reported.

By contrast, Mintzberg (1994a) indicates that strategic thinking is about synthesis. Liedtka (1998) suggests that such thinking is intuitive, experimental and necessarily disruptive, and attempts to explore areas beyond logical thinking, in order to develop a vision of an organisation's future. Because information about potential futures is always incomplete, the thinking required for success in this activity needs to be 'synthetical' and inductive, rather than analytical and deductive:

Foresight in an organisational context is best conceived and positioned as an aspect of strategic thinking, which is meant to open up an expanded range of perceptions of the strategic options available, so that strategy making is potential wiser. Strategic thinking is concerned with exploration, often based on limited and patchy information and options, not the steps needed for implementation of actions, which is the realm of strategic planning (Conway and Voros, 2002).

Strategic decision making is the interface between strategic thinking and planning, where directions are set. At this stage, options are assessed, choices examined, decisions made and a destination selected. *Strategic thinking* is about exploring possibilities and options, *strategic decision making* is about setting directions, and *strategic planning* is about implementing actions. Successful strategy needs all three stages. As Wilson (2004) writes, 'there is little to be gained from developing a plan per se. There is everything to be gained from the thinking that lies behind the plan--and the action that follows it'.

This three level model developed provides as a framework for implementing strategic foresight in organisations, as shown in Figure 1. This framework includes all elements of

current planning models and integrates futures approaches at the strategic thinking stage.

Strategic planning then becomes the implementation stage of strategic foresight.

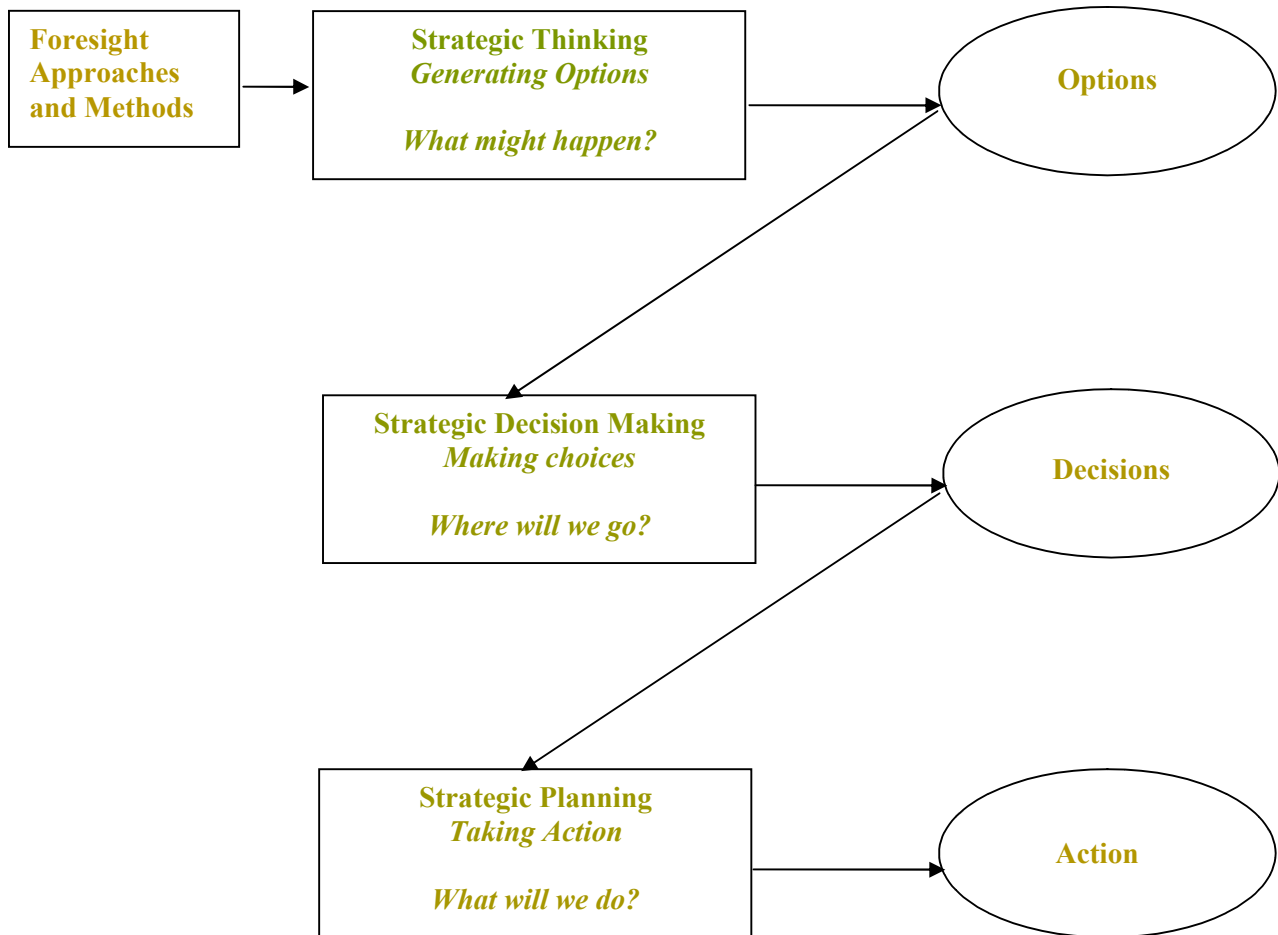


Figure 1: Three Level 'Strategic Foresight' Framework

A fairly simplistic interpretation of strategic foresight in organisations, this framework makes it clear that strategic planning is not the whole, but a critical element in a process that allows the future to be considered as an integral element in strategy development. Strategic foresight can be positioned in an organisation as 'an element of strategic thinking which informs strategy making, which directs strategic planning and action. Care [should be] taken to stress that it does not replace strategic planning but rather enriches the context within which strategy is developed, planned and executed' (Conway and Voros, 2002).

So, how might a strategic foresight process be developed in an organisation? Or, more appropriately for this paper, how might strategy development be re-conceptualised to include systematic thinking about the future?

Slaughter (1996) describes a five stage process for the development of social foresight which includes the development of foresight as a core competence across organisations. Those five levels of development are:

Level 1: recognition of foresight as an innate human capacity: every individual has the capacity for foresight,

Level 2: immersion in foresight concepts: using foresight concepts and ideas to generate a futures discourse,

Level 3: using foresight methodologies: use of key methods to make foresight “real,

Level 4: creating organisational niches: permanent, purpose built areas to focus foresight, and

Level 5: foresight at the social level: where long-term thinking becomes the norm.

Slaughter indicates that foresight is an innate capacity of the human brain, and that everyone holds the capacity to think about the future. Once there is this recognition, individuals can immerse themselves in futures concepts, methods and approaches, before they begin to use futures or foresight methodologies in their work. Organisational niches need to be created to foster foresight in the organisation so that it becomes the norm internally and, finally, social foresight will be achieved when there are enough organisations in society using foresight.

Recognising that foresight is an innate human capacity of all staff in an organisation – that all staff think about the future on a daily basis - means that in the planning context, all staff are capable of strategic thinking, not just the executive of an organisation. This is different from a traditional perspective that ‘strategic thinking is a process that takes place in the mind of the leader of an organisation’ (Sidorowicz, 2000), with the strategy taken to staff for consultation to secure ‘buy-in’, followed by documenting the strategy in plans which is then implemented by staff and tracked through the use of performance measures, both for the organisation and

for staff. There is an assumption here that including specific actions and measures in staff performance plans will ensure successful implementation, which is not necessarily the case.

But, for organisations and staff to think about the future in their routine planning requires overt processes to be put in place to surface individual thoughts about the future, and then allow a collective consideration of those views. As Voros (2002) indicates, organisational foresight requires thinking to move from thinking within individual brains to thinking shared among many, from implicit to explicit, from individual to collective, and from unconscious to conscious before an organisation can begin to systematically think about its future and use subsequent insights in its strategy development.

At this point, it is also important to recognise that all staff in organisations have their own particular worldviews, conditioned and developed over time. Unless staff are aware of these worldviews, and are open to having them challenged, moving foresight to an explicit activity in organisations is problematic. Following Snowden (2003:1), the influence of human agency in strategy development is often, despite appearances and an abundance of data, not rational:

“Humans do not make rational, logical decisions based on information input, instead they pattern match with either their own experience, or collective experience expressed as stories. It isn’t even a best fit pattern match, but a first fit pattern match ... The human brain is also subject to habituation, things that we do frequently create habitual patterns which both enable rapid decision making, but also entrain behaviour in such a manner that we literally do not see things that fail to match the patterns of our expectations”.

Exploring the concept of worldview and its influence on strategic decision making is beyond the scope of this paper. The interrelationships among worldviews, organisational power, personal ego and organisational rewards on such decision making can have both positive and negative impacts on foresight work, however, and cannot be underestimated.

Thinking about the future requires an understanding of futures concepts and an understanding of the level of depth of futures work – pragmatic, progressive or civilisational – and the type of methods to be used – input, paradigmatic, analytical or interpretative (Slaughter, 1999). Only when such an understanding is present should explicit futures methodologies, such as scenario planning, be introduced in an organisation. Slaughter (1999) discusses in some detail the depth of futures work, and the current dominance of superficial ‘pop’ futures in much western work. Most organisations work at the pragmatic level, focusing on current issues. Choice of methodologies will depend on how effectively the organisation has engaged in a futures discourse, and which methods are most appropriate to analyse the organisation and its environments at any given time. Those methods will change over time as a strategic foresight capacity is embedded in the organisation.

It is worth noting at this point that a generic foresight process, depicted in Figure 2, has been developed by Voros (2003) to provide a framework for understanding how foresight ‘fits’ into existing strategy development and planning processes.

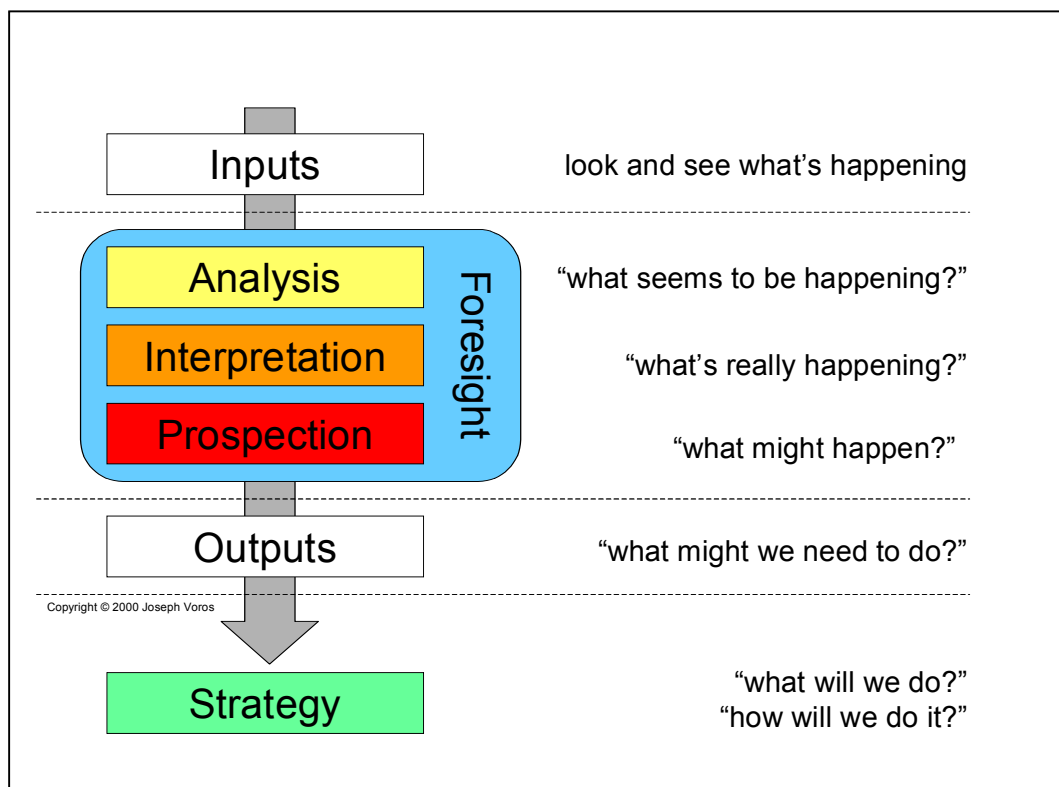


Figure 2: Generic Foresight Process

Analysis and interpretation of data is an accepted step in current planning models, but the prospection stage is either not attempted or not done in enough depth. It is adding the prospection stage – consideration of what *might* happen - and maintaining it over time that develops and embeds a strategic foresight capability in organisations.

Building Strategic Foresight

Building a strategic foresight capacity takes time. In the lives of busy executives, a commitment needs to be made to spend time to think systematically about the future. Simplistically, this means ensuring that meeting times are included in diaries, but it also means finding ways to capture the commitment of individuals to the process. How to ‘craft the foresight message’ so that executives accept the need to consider the future in strategy development is not yet clear.

Some other implementation issues to be considered, derived from both the literature and personal practice, are provided below.

- Work should be with staff across the organisation, as well as executive managers. If all staff are able to think strategically, organisations which tap into this ability by generating a futures discourse will, over time, develop a level of awareness or consciousness *as an organisation* about how to think about the future. Without this consciousness, an organisational strategic foresight capacity is unlikely to develop.
- Understanding its role in sustainability generally – that is, acknowledging a degree of responsibility for the planet and for future generations – can be a useful way of introducing the rationale for thinking about the future to the organisation. Many organisations are already committed to triple bottom line reporting which, while expedient, is the first step in broadening thinking beyond solely financial and organisational imperatives.

- Building an understanding of the realm in which the organisation's strategy is to be developed - pragmatic, progressive or civilisational - is an important step. Is the organisation going to attempt to address a global issue, or will it be pragmatic and focus on an organisational or industry issue? Realistically, most planning occurs in the pragmatic arena but, over time, an organisation could set its vision on a broader, more global agenda.
- The organisation will need to focus its foresight work – is it about helping the organisation develop its preferred future and documenting that in a plan, or is it about embedding a more general foresight capacity in order to continually consider all potential futures, whether possible, plausible or probable?
- The use of a range of methodologies needs to encompass both qualitative and quantitative approaches. As the organisation becomes more 'futures aware', more complex and challenging methodologies can be used. Starting with scenario planning, for example, can be valuable as long as it is not the only methodology ever used. All methods have flaws, and a range of methods will help ensure outputs are well-founded.

Hines (2002:339-340) points out that evidence suggests that 'using futures thinking and tools improves our decision-making and our lives, on a personal, organization, and community/social and global level', but that changing an entire organisation and building the future into strategy development, requires 'an enlightened CEO and upper management that sees the need for this thinking. This, unfortunately, remains the small minority of situations'. Tackling the worldviews of organisational executives remains a significant challenge for planners wishing to integrate a futures approach into their planning processes.

Concluding Comments

This paper has discussed the need to re-conceptualise the traditional strategic planning model in order to identify strategic thinking both as a separate realm of activity and as the organisational ‘home’ of foresight. Integrating futures approaches into planning means that a foresight capacity can develop over time, so that strategy will be considered and decided using knowledge about the past, present *and future*, and implemented through the use of strategic planning processes.

Making better and wiser decisions about future directions and strategy today is a fundamental aim of strategic foresight. Increasing the depth of knowledge available to underpin decision making about strategy options by analysing a combination of past, present and future information can only strengthen the foundation upon which an organisation’s strategy is built. The evidence suggests that those organisations embracing foresight will have successful strategy, while hindsight will indicate that a lack of strategic foresight was a major contributor to organisational failure.

Slaughter (2004) provides the final words on the rationale for strategic foresight in organisations:

The near term future can be clearly understood by developing the right capacities, asking the right questions and nurturing the right people. The careful use of such resources provides organisational access to an evolving structural overview of the next couple of decades ... Organisations that participate effectively in this process will find a range of valuable outcomes: they will seldom be overtaken by change, they will not succumb to crisis management, they will find it easy to avoid problems and seize opportunities, they will develop long term vision and a kind of forward looking prescience ... strategic foresight can supply a coherent forward view that will be a cornerstone of organisational success in the 21st century.

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