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The Future of Public and Nonprofit Strategic Planning in the United States

Part VI: The Past as Prelude: Were the Predictions of Classic Scholars Correct?

Strategic planning is now a ubiquitous practice in U.S. governments and nonprofit organizations. The practice has become widespread for many reasons, but the chief one is the evidence that strategic planning typically "works," and often works extremely well. Improvements in strategic planning practice are likely to come as it is seen and researched in its full richness as a practice, or set of practices. Several predictions are offered about the future of strategic planning practice and research.

Guest editors' note: In 1942, the University of Chicago Press published a book edited by Leonard D. White titled *The Future of Government in the United States*. Each chapter in the book presents predictions concerning the future of U.S. public administration. In this article, John M. Bryson examines John Vieg's predictions on the future of government planning published in that book, comments on whether Vieg's predictions were correct, and then looks to the future to examine public administration in 2020.

Over the last 25 years, strategic planning has become a ubiquitous practice in U.S. governments and nonprofit organizations (e.g., Berman and West 1998; Berry and Wechsler 1995; Brudney, Hebert, and White 1999; Poister and Streib 2005; Stone, Bigelow, and Crittenden 1999). While there is a dearth of large-sample studies demonstrating its effectiveness one way or the other (Poister, Pitt, and Edwards 2010), there are numerous in-depth case studies indicating its usefulness at different levels of government, in nonprofit organizations, and for collaborations. Experience demonstrates that strategic planning can be used successfully by

- Public agencies, departments, or major organizational divisions (e.g., Barzelay and Campbell 2003; Bryson 2004a)
- General purpose governments, such as city, county, state, or tribal governments (e.g., Hendrick 2003; Kissler et al. 1998)
- Nonprofit organizations providing what are essentially public services (e.g., Stone, Bigelow, and Crittenden 1999; Vilà and Canales 2008)

- Purpose-driven interorganizational networks (such as partnerships, collaborations, or alliances) in the public and nonprofit sectors designed to fulfill specific functions, such as transportation, health, education, or emergency services (e.g., Burby 2003; Innes and Booher 2010; Nelson and French 2002)
- Entire communities, urban or metropolitan areas, regions, or states (e.g., Chrislip 2002; Wheeland 2004)

The benefits can be of many kinds, including,

- *Promotion of strategic thinking, acting, and learning* (e.g., understanding context, clarifying mission, figuring out what strategies are best, negotiating performance measures and standards, building needed coalitions of support)
- *Improved decision making* (e.g., making decisions tied to organizational purposes and in light of future strategic consequences)
- *Enhanced organizational effectiveness, responsiveness, and resilience* (e.g., meeting mandates, fulfilling mission, improved overall coordination and integration, better performance control, satisfying stakeholders according to their criteria, adapting to environmental changes)
- *Enhanced effectiveness of broader societal systems* (e.g., collaborating with others, often across sector boundaries, to address broad public problems)
- *Improved organizational legitimacy* (e.g., based on satisfying key stakeholders and creating real public value at reasonable cost)
- *Direct benefits for the people involved* (e.g., human and social capital building, improved morale, fulfillment of job responsibilities, improved competency, enhanced job prospects, reduced anxiety)

Of course, there is absolutely *no* guarantee that *any* of these potential benefits will accrue to individual organizations or collaborations, but there is certainly considerable evidence that many organizations have

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garnered some significant fraction of the benefits of strategic planning—and continue to do so as they gain more experience with it.

The remainder of this essay is in five parts: First, I offer definitions for strategic planning and the broader concept of strategic management, as well as discuss their functions and approaches to their fulfillment. Second, I describe how and why I think strategic planning has become standard practice for most governments and nonprofit organizations. Third, I argue that in order to improve strategic planning in both practice and theory, it is important to view it as a practice. Fourth, I make some predictions about how strategic planning practice may change in the next decade. Finally, I offer concluding thoughts.

Strategic Planning and Strategic Management: Definitions, Functions, and Approaches

As strategic planning became more widespread, the world of practice began to focus on effective strategic management, which embraces strategic planning and implementation. Strategic management may be viewed as the appropriate and reasonable *integration* of strategic planning and implementation across an organization (or other entity) in an ongoing way to enhance the fulfillment of mission, meeting of mandates, continuous learning, and sustained creation of public value (see table 1). I define strategic planning as a deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization (or other entity) is (its identity), what it *does* (its strategies

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Table 1 Strategic Management, Strategic Planning, and Implementation: Definitions, Functions, and Approaches

Strategic Management	
	The appropriate and reasonable integration of strategic planning and implementation across an organization (or other entity) in an ongoing way to enhance the fulfillment of mission, meeting of mandates, continuous learning, and sustained creation of public value.
	Strategic planning: "a deliberative, disciplined effort to produce fundamental decisions and actions that shape and guide what an organization (or other entity) is, what it does, and why it does it" (Bryson, forthcoming).
	Implementation: the ongoing effort to realize in practice an organization's mission, goals and strategies, the meeting of its mandates, continuous organizational learning, and creation of public value.
Functions	<p>Designing and integrating kinds of work that have to be done in an a reasonably formalized way, for the sake of clarifying organizational purposes, mandates, goals, issues, strategies, and requirements for success; the work includes design and use of deliberative settings to foster collective strategic thinking, acting, and learning around key issues</p> <p>Addressing the kinds of work that should be done in a reasonably formalized way, for the sake of building the enterprise's capacity for, and delivery of, success over time; the work includes designing a strategic management system linking purposes, people, structures, processes, resources, political support, and learning in productive ways</p> <p>Clarifying the purpose and placement of the strategic planning function within a governmental or nonprofit organizational design</p>
Approaches to Fulfilling the Functions	<p>A strategic planning approach is a kind of response to circumstances recognized as challenges that people judge to require a considered, collective, and often novel strategic response.</p> <p>Such responses are part of complex social problem solving, inseparable—and in many ways indistinguishable from—other parts of the same thing. Still, for purposes of discussing enterprises in which planning plays a role, it is advantageous to use <i>strategic planning</i> to characterize this "part" of response scenarios to challenges.</p> <p>A widely used approach is the strategy change cycle (Bryson 2004a), which includes attending to context and developing and linking purposes, strategies, participation, and the coalitions of support needed to adopt desirable changes and protect them during implementation, as well as building capacity for ongoing implementation, learning, and change</p>
	<p>Developing an appropriate formal <i>strategic management system</i> in practice and the placement and role of strategic and operational planning within it</p> <p>Linking budgeting, performance measurement, and performance management to meet mandates; achieve agreed mission, goals, strategies, and requirements for success; allow for desirable changes in ends and means to emerge over time; and achieve significant public value</p> <p>Making use of forums and formative evaluations to tailor and adjust strategies during implementation to increase chances of success</p> <p>Making use of forums and evaluations to help judge the degree to which success has been achieved, and whether new ends and means should be pursued</p> <p>There are several approaches to, or kinds of, <i>strategic management systems</i> (Bryson, 2004a):</p> <ul style="list-style-type: none"> • Layered or stacked units of management, including use of cascaded balanced scorecards to help with alignment • Strategic issues management, including PerformanceStat systems (Behn 2008) • Guided incrementalism (Barzelay and Campbell 2003) • Contract models • Value chain management • Portfolio approaches • Collaboration models (Provan and Kenis, 2005): <ul style="list-style-type: none"> ○ Lead organization ○ Shared governance ○ Partnership administrative organization • Goals or benchmark approaches • Hybrid models (i.e., combinations of two or more of the above)

Source: Adapted in part from Barzelay and Bryson (2010).

and actions), and *why* it does it (mandates, mission, goals, and the creation of public value) (Bryson, forthcoming). Strategic planning is not any one *thing*, but is instead an adaptable *set* of concepts, procedures, tools, and practices intended to help people and organizations figure out what they should be doing, how, and why (Bryson 2004a, xii).

Implementation, on the other hand, encompasses the ongoing effort to realize in practice an organization's mission, goals, and strategies; continuous organizational learning; and creation of public value. Both strategic planning and implementation are action oriented and mutually influence each other. The difference between the two is a matter of emphasis. In strategic planning, frame setting and guidance for subsequent decision making prevail; in implementation, the focus is on sustained action within the constraints of mandates, mission, goals, and strategies, while being open to new learning that may affect the framework for action. In practice, there should be feed-forward and feedback loops between the two (Crossan, White, and Lane 1999; Poister and Streib 1999).

The functions served by strategic planning and implementation are also complementary. Strategic planning at its best involves reasonably deliberative and disciplined work around clarifying organizational purposes and the requirements and likely strategies for success. The process, therefore, is meant to foster strategic thinking, acting, and learning.¹ Strategic planning also should focus on the work of figuring out how to build organizational capacity for, and delivery of, success over time. This includes deliberating on how to link purposes, people, structures, processes, political support, and learning in productive ways—in other words, how to pursue effective strategic management.

Finally, a key function of strategic planning efforts is to figure out where and how best to lodge the function within an enterprise. The functions of implementation also encompass strategic thinking, acting, and learning, but with more of a pronounced emphasis on ongoing learning-by-doing in a very pragmatic way within the constraints (which may be questioned) of established mandates, mission, goals, and strategies (Dewey 1954; Hoch 2002, 2007; Simons 1995). Action learning (Eden and Huxham 2006) and organization development (Cummings and Worley 2008) are thus important parts of both strategic planning and implementation, including learning focused on developing the strategic management system so real public value is created and sustained over time. Utilization-focused evaluation to facilitate implementation and assess overall performance should be seen as a complementary and necessary part of effective strategic management (Patton 2008).

Several practice-oriented academics and practitioners have developed distinctive approaches to strategic planning and implementation (e.g., Barry 1997; Bryson 2004a; Cohen, Eimicke, and Heikkila 2008; Mulgan 2009; Niven 2008; Nutt and Backoff 1992; Poister and Streib 1999). All agree, however, that there are no-one-size-fits-all approaches. Strategic planning and implementation must be adapted carefully to context, even though their purposes typically include changing significant parts of the context. The starting point, in other words, must be things as they are (Mulgan 2009; Scharmer 2009).

Strategic planning is also just one among many responses to important challenges; in practice, the boundaries between “it” (as an adaptable set of concepts, procedures, tools, and practices) and other approaches (e.g., muddling through, chief executive decision making with little consultation, acting on intuition, crystallizing emergent ideas, prototyping and experimentation) are often quite blurred. Nonetheless, strategic planning as a reasonably deliberative, disciplined, yet flexible practice has characteristics and advantages that distinguish it from other kinds of responses to challenges. (Unfortunately, those advantages can be easily undermined if the practice involves rigid adherence to an inflexible process that drives out strategic thinking, acting, and learning.) Strategic management systems in practice also often blur with other approaches to ongoing implementation and learning.

How and Why Strategic Planning Has Become Standard Practice

Strategic planning is typically pursued by senior elected officials and/or general managers and focuses on an organization, collaboration, or community. At its best, it may be distinguished from other kinds of planning by its intense attention to purpose, stakeholders, internal and external environmental assessment, major issues requiring resolution, viable strategies for doing so, political savvy and necessary coalition formation, focused action, the many aspects of implementation (e.g., budgeting, performance measurement, and evaluation), and ongoing learning (e.g., Bryson 2004a; Nutt and Backoff 1992).² Said differently, strategic planners at their best are likely to think of organizations in relation to their environments as flows of various kinds through time and across space, for example, of people, resources, activities, decisions, attention, services, and so forth. What strategic planning tries to do is inform and foster decisions and actions meant to affect something important about those flows—for example, their direction, content, shape, size, volume, speed, and/or integration—in order to improve their effectiveness, along with ongoing organizational capability, viability, and/or legitimacy in the eyes of key stakeholders. Strategic planning of this sort bears little resemblance to the characterizations of it by critics as rigid, formulaic, excessively analytic, and divorced from implementation (e.g., Mintzberg, Ahlstrand, and Lampel 1998, 49–84). The criticisms seem to be based primarily on an exegesis and critique of historical texts and outdated private sector practice.

Planning in general has been part of public and nonprofit management for a long time (Friedmann 1987; Graham 1976; Hall 2002). After all, it is the “P” in Luther Gulick’s (1937) famous acronym POSDCORB, which stands for planning, organizing, staffing, directing, coordinating, reporting, and budgeting. *Strategic planning*, of the sort described earlier, got a boost in 1942 from political scientist, public servant, and political activist John Vieg, who argued at the end of the Great Depression and the beginning of World War II that the country had seen enough of *negative planning* (italics in original), by which he meant “deliberately refraining from public control over more than a few fields of social action in the confident belief that all would then go well in the vast areas left ‘free.’” He believed that the American people were “prepared to move toward *positive planning*,” (italics in original), by which he meant “the foreshaping of things to come” and “the experiment of a conscious design of living that, at least in the essentials of existence, will leave less to the play of chance” (Vieg 1942, 63).

Vieg saw planning as an executive function related to advising decision makers and intended “to protect and promote the public interest and the general welfare” (65). In order to give decision makers a broader view, he thought that planning should be more concerned with synthesis than analysis. In his strategic view, planning was needed at all levels. At the national level, the recent experience of the Great Depression and the New Deal convinced policy makers of the necessity for economic and social planning. Moreover, the need for massive war planning was painfully obvious and pressing. The only real prior precedents for national planning had occurred during World War I (Graham 1976) and the Civil War (Faust 2008). Vieg clearly recognized the limits of national planning and saw strong arguments for subnational planning at the regional and state levels. He also saw a crying need for broader and more effective municipal-level planning and planning for rural areas. Drawing on arguments in Robert Walker’s influential book *The Planning Function in Urban Government* (1941), Vieg asserted that municipal planning needed to embrace *all* of the functions of city governments, not just the physical functions of transportation, water, sewer, public facilities, and parks.

Unfortunately, more strategic municipal planning of the sort Vieg wished to see did not take hold until the 1980s. Until then, municipal planning primarily involved capital budgeting and so-called comprehensive city planning—which was not comprehensive at all, but limited to physical functions (Hall 2002). Strategic planning instead had become a primarily private sector phenomenon (Bryson and Einsweiler 1988) and did not show up on the public sector screen until Olsen and Eadie’s (1982) and Sorkin, Ferris, and Hudak’s (1984) pathbreaking books. Mayors and city managers realized that strategic planning could help them gain intellectual and practical control over their cities in a way that their city planners could not or would not. In contrast to comprehensive planning, strategic planning considered the full range of city functions and stakeholders; the array of city strengths, weakness, opportunities, and threats; strategic issues and what might be done about them, and was very action oriented. At a time of resource shortages and rising citizen activism, strategic planning helped senior managers make substantively, procedurally, politically, and administratively rational decisions (Bryson and Einsweiler 1988). Vieg summarizes his predictions for the future by saying that “planning will be far more firmly established in government than it is today” (1942, 86). He clearly was prophetic—though several decades premature.

Vieg also asserted that the “planners” should vary by organizational level: “At the top, where planning means choosing among ends, the planners are political leaders and philosophers; below this level planning is concerned with choices among means, and there is a place and need for persons who make public planning a profession—for specialists who prefer to specialize in generality” (1942, 67). Because of his belief in representative government and democratic accountability, Vieg clearly thought that professional planning should always be advisory, but just as clearly, he thought that the advice needed to be imaginative, thoughtful, practical, and linked to decision making. The practice of strategic planning has evolved differently than Vieg imagined. Clearly, the “planners” at the top are political decision makers and managers, and the rise of strategic planning in the last 25 years may be explained in part by its usefulness to them (Barzelay and Campbell 2003; Bryson, Crosby, and

Bryson 2009; Bryson and Einsweiler 1988; Wheeland 2004). But strategic planning’s increasingly direct links to decision making and implementation sound less advisory than intimately entwined with ongoing organizational leadership and management.

Successes of strategic planning at the municipal level, as well as the desire to appear more “business-like,” helped trigger the use of strategic planning by nonprofit organizations, states, and the federal government. Osborne and Gaebler’s best-selling 1992 book *Reinventing Government* was also an important catalyst. The Government Performance and Results Act of 1993 requires strategic planning by all federal agencies, and many states have similar laws. At present, there are many possible explanations for why strategic planning is so widespread, including coercion (many governments are required to do it; many nonprofits are also required to do it by funders), normative pressures (strategic planning is seen as a sign of good professional practice and necessary to create legitimacy), and mimesis (meaning faddishness or copying what everyone else is doing) (DiMaggio and Powell 1983). I find more persuasive, however, the argument that strategic planning is popular because in many circumstances it seems “to work”—in the sense of helping decision makers figure out what their organizations should be doing, how, and why.

A growing number of studies indicate that it works—and often strikingly well—in a variety of situations (e.g., Barzelay and Campbell 2003; Borins 1998; Boyne and Gould-Williams 2003; Bryson and Bromiley 1993; Bryson, Crosby, and Bryson 2009; Bryson and Einsweiler 1988; Eden and Ackermann 1998; Frenzel, Bryson, and Crosby 2000; Hendrick 2003; Wheeland 2004). Assuming that strategic planning is a key management function, these findings complement a growing body of evidence in large-*N* studies about the positive effect of management, and especially high-quality management, on performance (e.g., Meier and O’Toole 2002, 2009). The effects typically are not huge, but they are statically significant and clearly support the argument that management (including planning) is an important component of creating enduring public value.

In sum, strategic planning has now become a conventional feature of most governments and nonprofit organizations. A growing body of evidence indicates that, in general, across substantial populations of organizations, both public and nonprofit, strategic planning does produce positive benefits on a modest scale, and in some instances produces quite outstanding positive results. My guess is that the production of positive results will continue and that the magnitude of the effects across populations of governments and nonprofits likely will increase incrementally over the next 10 years as experience with strategic planning grows, and as pertinent useful research also increases. I also predict that strategic planning use and effectiveness will increase in multiorganizational and cross-sector collaborations. The process may not be called strategic planning, but, in effect, that is what it will be, given the necessary focus on using deliberative and reasonably disciplined processes for figuring out purposes, attending to stakeholder needs and expectations, finding practical strategies, and producing public value (e.g., Agranoff 2007; Huxham and Vangen 2005; Innes and Booher 2010).

Strategic Planning as a Practice³

Looking ahead to the next decade, what can be done to get the most out of strategic planning? As an academic with considerable

practical experience, I see a real need for better practice-oriented theory to help guide and learn from improvements in strategic planning. Specifically, I believe that significant improvements in strategic planning practice will come when “it” is widely understood in its full richness as a managerial *practice* or *set of practices*—and *not* as some kind of fairly rigid recipe for producing standardized objects called strategic plans that somehow are meant to implement themselves. Viewing strategic planning as a practice fits with what has been called the “practice turn” in the social sciences generally (Reckwitz 2002; Schatzki, Cetina, and Savigny 2001), and in strategic management research (e.g., Jarzabkowski 2005; Johnson et al. 2007) and urban planning research specifically (Healey 2006; Innes and Booher 2010). It also fits with the “pragmatic turn” in philosophy, in which actors’ practical wisdom is accorded new respect (Egginton and Sandbothe 2004; Hoch 2007; Innes and Booher 2010; Menand, 2001).

While practice has become a prominent research focus in the social sciences recently, its intellectual roots are deep (Johnson et al. 2007; Latour 2005; Nicolini, Gherardi, and Yanow 2003; Senneff 2008). “Practice theory” is the term typically used to indicate important commonalities across a range of theoretical approaches to the study of practice. Schatzki (1996) and Reckwitz (2002) are the most frequently cited authors, with the latter identifying Bourdieu, Foucault, Giddens, Butler, Garfinkel, Charles Taylor, and Schatzki himself as significant contributors. Put differently, until now, social science has not had much to offer to improve strategic planning practice. In the future, I think it can, as long as strategic planning is properly understood as a practice.

Jointly, Schatzki and Reckwitz provide the outlines of a coherent approach to studying practices. As summarized by Shove et al. (2007, 12–14), the premises are as follows: *First*, according to Reckwitz, a practice may be defined as “a routinized type of behavior which consists of several elements, interconnected to one another: forms of bodily activities, forms of mental activities, ‘things’ and their use, [and] a background knowledge in the form of understanding, know-how, states of emotion and motivational knowledge” (2002, 249). The definition clearly entails a caution to practitioners and researchers not to overly reify “things” such as strategic planning or strategic management, that is, not to take strategic planning and management as standardized “things” or “objects” that can simply be adopted—mechanically installed, as it were—and then be up and running on their own. Instead, strategic planning and management should be understood as partially routinized behaviors intended to promote strategic thinking, acting, and learning, involving typically complex assemblies of actors and objects held together by ordering and sense-making principles, that are maintained and changed over time through the way they are performed (Bryson, Crosby, and Bryson 2009; Giddens 1984; Latour 2005). Strategic planning in practice, while it may be represented or described simply, is thus a very complex *process*—as “reflective practitioners” (Schön 1987) all know.

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Second, practice is a fundamental component of social existence, as both individuality and social order result from practices (Schatzki, 1996). Strategic planning as practice involves ideas, behaviors, and collective actions that are determined by both individual human agency and structural and institutional forces. Strategic choices are made by individuals and groups who are embedded in social structures that are reproduced and shaped by individual and group actions. Practice theory, in Shove et al.’s words, “emphasizes tacit and unconscious forms of knowledge and experience through which shared ways of understanding and being in the world are established, through which purposes emerge as desirable, and norms [are seen] as legitimate” (2007, 12). Thus, there is typically more going on than meets the eye.

Third, it is simplistic to view a practice as just what people do. Schatzki (1996) helps clarify how much more is involved than “just doing” by distinguishing between practice as a coordinated entity and practice as a performance. As an *entity*, practice has a relatively enduring existence across both actual and potential performances, although its existence depends on its recurring enactment by practitioners. When people have discussions about strategic planning *in the abstract*, they are talking about it as an *entity*. In contrast, *practice as performance* refers to the active doing through which a practice-as-entity is maintained, reproduced, and possibly changed. This distinction leads to the assertion that practices cannot be reduced just to what people do. Instead, as Shove et al. note, “doings are performances, shaped by and constitutive of the complex relations—of materials, knowledges, norms, meanings and so on—which comprise the practice-as-entity” (2007, 13).⁴ Strategic planning thus should not be viewed simply as a “thing” that people “do” with the help of artifacts (process diagrams, flow charts, strategy maps, plans, forms, etc.), but as a *generative system* that can produce patterns of strategic action through specific performances based on context-specific, situated local judgment and improvisation.

Fourth, practice theory expands the central foci of dominant social theories—minds, conversations, texts, and/or specific behaviors and interactions—as Reckwitz notes, by “simultaneously [shifting] bodily movements, things, practical knowledge and routine to the center of the vocabulary” (2002, 259). Practice theories thus “contend with and seek to account for the integration and reproduction of the diverse elements of social existence” (Shove et al. 2007, 13). Viewing strategic planning as a practice thus requires that it be seen as quite richly constituted when done well, and not as easily reduced to the scaled variables of variance studies (e.g., Bryson, Crosby, and Bryson, 2009; Forester 1999; Jarzabkowski 2005).

A *final* point comes from Wenger, who emphasizes the importance of “communities of practice” (1998, 4–9). Practices are sustained or changed in communities (which themselves may be sustained or changed). More to the point, collective strategic thinking, acting, and learning occur in communities of practice that vary in permanence. Indeed, temporary cross-boundary communities such as strategic planning coordinating committees, task forces, or teams

are often intentionally created to shake up people's thinking, acting, and learning. The knowledge that is brought to bear or produced (learned) should relate to understanding and/or achieving the purposes of an enterprise or its parts (4). Knowing and learning, however partial, are a matter of actively engaging in the pursuits of such enterprises and working to make the engagement meaningful (4). Learning is thus an ongoing issue of sustaining the interconnected communities of practice that make up any organization and through which it knows what it knows and thus becomes effective and valuable as an organization (8). Of necessity, because communities are involved, issues of personal and collective identity are also involved, which means that changes in practices and organizations also necessarily involve at least marginal changes in personal and collective identity (Fiol 2001), or organizational culture more broadly (Schein 2004). From a practice perspective, it is a serious error to view strategic planning as any kind of technocratic, mechanistic, strictly linear process. Instead, at least at its best, it should be viewed as a much richer, fuller bodied, more fully human (physical, social, emotional, even spiritual) endeavor engaged in by communities of practice presumably intent on strategic thinking, acting, learning, and meaning making on behalf of their enterprises, and their individual and collective identities. In sum, I assert that an important future direction for strategic planning practice and theory is to focus on strategic planning as a practice, or set of interrelated practices, and not as an entity abstracted far from practice.

That said, I also note a serious problem with most practice theory, which is that while it does attend to processes, the typical findings do not lead easily to design principles or rules (Rommes 2003) that might be used to guide future action, nor does it attend to the social mechanisms (Mayntz 2004) that are the likely causal connections between elements of context, a process, and desired outcomes.⁵ As a result, the study of practice—usually in the form of case studies—typically offers little vicarious learning that is helpful for discerning “how outstanding performance characteristics or effects have arisen in undertakings, either by design or epiphenomenally” (Barzelay 2007, 525). When studies do not identify causal mechanisms, one does not know what actually explains the outcomes of specific practices. For practice theory to really help improve strategic planning practice, it will need to attend to what Bardach (2004) calls “the extrapolation problem” by using methodologies, such as that proposed by Barzelay (2007) to better “learn from second-hand experience.”

Predictions about the Future of Strategic Planning Practice and Research

In this section, I offer eight predictions about the future of strategic planning practice and research in the next 10 years. The predictions grow as much out of my experience as a strategic planning consultant and academic administrator as they do from my reading of the literature.

First, the need for strategic thinking, acting, and learning is only going to increase in the next decade.⁶ Just consider the changes of the first decade of the twenty-first century: it began with so much

promise—and then came 9/11, the spectacular collapse of once admired but actually corrupt corporations, Hurricanes Katrina and Rita, two quite lengthy wars in the Middle East, the financial crisis of 2007–2009 with its massive public debt hangover, and equally massive subsequent budget cuts at the state and local levels. Meanwhile, Brazil, Russia, India, and China (the so-called BRIC countries), as well as others, are rapidly emerging powers, and the U.S. economy is in the midst of major, not wholly understood, restructuring.

Information, communication, and social networking technologies are drastically changing our lives—Amazon, eBay, and Google all took off in the late 1990s; Facebook, YouTube, and Twitter are post-2000 inventions. The effects of nanotechnology, biotechnology, and moves away from a carbon-based economy will be huge. At the same time, confidence in

elected politicians, our governments, and most other institutions is in decline. Serious observers conclude that fundamental weaknesses in the American state presage a slow decline of the United States (Jacobs and King 2009). Public and nonprofit organizations are clearly stressed. What are their leaders and managers to do? The smart ones will emphasize strategic thinking, acting, and learning—and see strategic planning as a practice meant to help them do those things—that is, as a way of helping them “navigate between the twin dangers and enemies: mindless action and the actionless mind” (Scharmer 2009, 214).

Second, approaches or designs for strategic planning will continue to proliferate—although they may be called by other names (e.g., Holman, Devane, and Cady 2007). At the same time, practitioners and academics increasingly will demand greater evidence-based clarity about which approaches work best, for which purposes, in which circumstances, and why. In other words, there will be increasing demand for strategic planning to become a kind of “design science” (Simon 1996, 111–38; Barzelay 2007; Rommes 2003). As Herbert Simon noted, “Everyone designs who devises courses of action aimed at changing existing situations into preferred ones” (1996, 111).

For strategic planning approaches to become more practically and reliably useful, practitioners and academics will need to work together to figure out how learning from one situation may be used in the next when exact replication is not possible. What is needed is a catalog of challenges for which strategic planning approaches might be an effective response, clarity about which approaches are likely to work best for which challenges, a listing of the likely requirements for success, and detail concerning the specific design features or principles that should be employed to guide the actions needed to trigger (or suppress) the social mechanisms that are expected to produce desired outcomes (Michael Barzelay, personal communication). At the moment, much of this knowledge is stored as tacit craft knowledge in the heads of skilled and reflective practitioners (Schön 1987; Sennett 2008). Social scientists can help improve practice by engaging with these practitioners to clarify, codify, further test, and publicize this knowledge. Said differently, the best strategic planning practice is ahead of social science, but the best practice is unlikely to be spread quickly and be of most use without the help of the skills

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and publicity available to engaged scholars (Patton 2008; Posner 2009; Van de Ven 2007).

Having an available catalog of demonstrably useful designs for strategic planning, however, will not lead automatically to improved strategic planning practice. As Wenger notes, “Practice itself is not amenable to design . . . meaning learning cannot be designed: it can only be designed *for*—that is, facilitated or frustrated” (1998, 228). A significant challenge to improving strategic planning practice, therefore, is how to create process designs that specifically facilitate strategic thinking, acting, and learning rather than frustrate them. In other words, the last thing we should want is strategic planning processes that drive them out. A strategic planning process design (or approach)—for example, Nutt and Backoff’s (1992) strategic management process, Bryson’s (2004a) strategy change cycle, Eden and Ackermann’s (1998) journey-making process, or Rughase’s (2007) identity-based strategy-making process—should not be viewed as a simple recipe or specification, but instead should be seen as a “boundary object that functions as a communication-facilitating artifact around which communities of practice can negotiate their contributions, their positions, and their alignment” (Wenger 1998, 235).

Each of the designs mentioned includes concepts, process design guidelines, activities, tools, techniques, and advice regarding phases and potential mechanisms of engagement, imagination, and alignment. But the designs are not the process as brought to life by a community of practice; they are not the practice itself.⁷ Theoretically and descriptively rich case studies—and especially comparative case studies—will be needed, along with explicit attention to drawing the lessons to be learned from these cases for the design of future efforts (Bardach 2004; Barzelay 2007). Beyond that, standard teaching methods are unlikely to produce the kind of craft knowledge needed to improve the craft. Education in keeping with Schön’s *Educating the Reflective Practitioner* (1987) or Sennett’s *The Craftsman* (2008) will be needed.

Third, pressures for more inclusive approaches will increase, both for intra- and interorganizational change efforts, along with greater knowledge of effective practices for doing so. The pressures for greater inclusion are a consequence of (1) reframing many problems at a system level encompassing more than one organization, so that challenges around education, health care, economic development, disaster management, terrorism, and so on, require multiorganizational and often cross-sector responses (Crosby and Bryson 2005); (2) recognition that relevant expertise, perspectives, and local knowledge are distributed unevenly among many different kinds of people (Innes and Booher 2010); (3) recognition that if suitable designs are pursued, large, diverse groups of people can produce better judgments, coordination, and collaboration than small groups (Ball 2005; Surowiecki 2004); and (4) recognition that building needed coalitions for successful adoption and implementation of changes typically requires engagement of those responsible for making the changes happen (Crosby and Bryson, 2005, 2010; Epstein et al. 2005; Innes and Booher, 2010). The array of approaches to inclusion will continue to increase (e.g., Holman, Devane, and Cady 2007)—including ones making greater use of information, communication, and social networking technologies—and practitioners will become increasingly adept at tailoring participation approaches

differently for different stakeholders at different stages in the process (Bryson 2004b).

Fourth, pressures will increase for the use of methods that integrate analysis and synthesis into strategic planning processes. The need is particularly acute in situations in which marked feedback effects result in unpredictable consequences of action (Ball 2005). In these situations, some sort of dynamic system modeling is necessary in order to grasp the situation in a more holistic way and understand better what the first-, second-, and third-order consequences of actions might be (Eden et al. 2009). The use of scenarios to understand future drivers, possibilities, and constraints is likely to increase (e.g., Marcus 2009; Van der Heijden 2005). Approaches to visually mapping strategies will be more widely used (e.g., Bryson et al. 2004; Eden and Ackermann 1998; Niven 2008). So will geographic information technology in order to understand the spatial distribution of issues and consequences of decisions (e.g., Bryson, Crosby, and Bryson 2009). Information and communication technology-rich “decision theaters” will proliferate that can help managers do more real-time analysis, scenario construction, strategy development, decision making, and evaluation.⁸ Thoughtfully managed deliberation processes are even more important than advanced technology for good analysis, synthesis, and committed action (Garsten 2006). Innes and Booher (2010) offer a particularly good account of a practice-based approach to fostering dialogue in complex, ambiguous, and equivocal situations in which joint agreement and action across boundaries of various sorts are required to address the problem at hand and advance the common good (see also Scharmer 2009).

Fifth, the changes predicted here sit uneasily with increased expectations of, or requirements for, speedy responses to serious challenges. The desire for greater inclusion, appropriate analysis and synthesis, and speed is typically *not* possible to fulfill—because while a combination of any two is possible, achieving all three is extremely difficult (Eden et al. 2009). For example, in collaborative, cross-organizational strategic planning, the advantages of inclusion, analysis, and synthesis are typically gained at the expense of speed (Huxham and Vangen 2005; Innes and Booher 2010). Organizations that are able to act quickly in the face of strategic challenges are typically characterized by having long-standing prior good working relationships internally and externally, and by having done considerable collaborative prior analysis of challenges, synthesis of effective responses, and rehearsing of a range of responses (Weick and Sutcliffe 2007). A particular challenge for strategic planning practice, therefore, will be figuring out what “surprises” are predictable, or even inevitable, and then developing strategies consisting of necessary competencies and possible response repertoires that can be rehearsed and drawn on quickly to address the surprises when needed (Schwartz 2004; Weick and Sutcliffe 2007).

Sixth, greater clarity will develop about what strategies actually work in which circumstances, and why. Several public sector strategy typologies exist (e.g., Boyne and Walker 2004; Niven 2008; Nutt 2004; Nutt and Backoff 1992; Osborne and Plastrik 1997; Wechsler and Backoff 1987). In addition, one might argue that Salamon’s (2002) assembly of public sector “tools,” or policy instruments, constitutes a typology of strategies. Each of these typologies is premised on viewing strategy as an entity, not as a practice, and none clearly specifies the social mechanisms that are presumed to provide

the causal explanations for the effectiveness of different strategies. In the next 10 years, practice and research will help fill in the gaps, and strategic planners will gain a greater understanding of and confidence in knowing when and how to use particular strategies for particular purposes. As practices and performances, strategies will be seen as reasonably coherent and aligned assemblies of design features, communities of practice, and actions incorporated into specific situations in an intentional process of situated learning, and in which strategy is seen as some combination of what is intended, emergent, and ultimately realized (Mintzberg, Ahlstrand, and Lampel 1998). Any strategy in practice is unlikely to be a pure version of a particular strategy category, but instead will be a hybrid.

Seventh, a major category of strategic issues will revolve around strategic alignment. As strategic planning becomes increasingly integrated with other elements of strategic management, major attention will be focused on highlighting and resolving issues of alignment so that coherent, consistent, persuasive, and effective patterns are established across mission, policies, budgets, strategies, competencies, actions, and results (Barry 1997; Light 2008; Niven 2008). Concerns for alignments will arise as pressures increase for efficiency, effectiveness, and accountability (Moynihan 2008). Balanced scorecards and strategy maps are quite useful for clarifying and resolving issues of alignment (Kaplan and Norton 2006), although in my experience, they are not very good for formulating strategies in the first place, because the scorecard categories are essentially predefined and the working out of causal linkages is difficult given the rigidities. Other, more flexible approaches to strategy mapping, such as Eden and Ackermann's (1998) and Bryson et al.'s (2004) causal mapping processes, are better at formulating strategies, which then may be programmed effectively using balanced scorecards and strategy maps.

Finally, and by way of summary, there will be a heightened emphasis on strategic planning as a way of knowing and learning (e.g., Bryson, Crosby, and Bryson 2009).⁹ The move toward strategic management in public and nonprofit organizations has already been noted. The move includes integrating strategic planning, budgeting, human resource management, and performance measurement and management. An important next phase for strategic planning and strategic management will be incorporating more directly ideas and practices for fostering organizational learning and knowledge management (e.g., Cummings and Worley 2008; Moynihan and Landuyt 2009). This move will take seriously, from a practice and a research standpoint, the assertion by many strategic planning advocates that a major benefit of strategic planning is the learning that occurs during the planning process (e.g., Barzelay and Campbell 2003; Bryson 2004a; Nutt and Backoff 1992). Learning occurs, for example, about what the mandates are and mission should be; the outside environment and concomitant opportunities and threats; the way things are currently done inside the organization and their attendant strengths and weaknesses; the major strategic issues; alternative strategies for addressing the issues; and, quite significantly, the politics surrounding any change effort. Further, this emphasis on learning underscores the importance of who is involved in the planning process, and how the design and evolution of planning processes can promote iterations of dialogue, deliberation, and change. This learning occurs within a community of practice and involves many different kinds of knowledge, including storytelling (Innes and Boher, 2010).

Work on organizational learning (e.g., Crossan, Lane, and White 1999) and organizational development (e.g., Cummings and Worley 2008), along with recent work on elements of strategic management, helps point the way to deeper and more pervasive inclusion of learning into strategic planning practice. For example, Moynihan (2008) develops important insights into how performance measurement information is used by organizations to promote learning. He develops what he calls an "interactive dialogue model" to explain how and why organizations use performance information internally and externally. In a complementary vein, Patton's (2008) work on utilization-focused evaluation provides practice-oriented guidelines for increasing utilization of evaluation findings. Similarly, Innes and Boher (2010) and Scharmer (2009) show how learning occurs in collaborations and offer many suggestions for promoting it.

In a related manner, because strategic planning is in large measure about designing mission- and goal-related alignment across organizational levels and functions, and between inside and outside, an explicit practice-based approach to improving strategic planning would pay particular attention to the role of bridging activities, roles, processes, and structures. Relevant research includes work on boundary-spanning roles and activities (Maguire, Hardy, and Lawrence 2004), the creation of boundary experiences and boundary groups and organizations (Feldman et al. 2006), boundary object creation and use (e.g., Carlile 2004; Kellogg, Orlikowski, and Yates 2006), and the development of nascent or proto-institutions (Lawrence, Hardy, and Phillips 2002).

Cross-boundary groups (boundary groups for short) are "collections of actors who are drawn together from different ways of knowing or bases of experience for the purpose of coproducing [cross-] boundary actions" (Feldman et al. 2006, 95). Typical examples would include strategic planning coordinating committees or task forces and strategic planning teams, as well as representative decision-making bodies. As some boundary groups become formalized, structured, and institutionalized, they become cross-boundary organizations or proto-institutions (Lawrence, Hardy, and Phillips 2002).

Adeptly designed boundary experiences are important for helping participants develop a shared perspective that they then can act on (Boland and Tenkasi 1995; Scharmer 2009). Boundary experiences are defined as "shared or joint activities that create a sense of community and an ability to transcend boundaries among participants" (Feldman et al. 2006, 94; Feldman and Khademian 2007). Many strategic planning activities, such as stakeholder analyses undertaken by a team, or strategy discussions by coordinating committees would be boundary experiences.

Boundary objects are typically important in helping people create shared meaning. Boundary objects are "physical objects that enable people to understand other perspectives" (Feldman et al. 2006, 95). Boundary objects can facilitate the transformation of diverse views into shared knowledge and understanding that can affect action (Carlile 2004). Of particular importance in strategic planning are discussion documents of various kinds and draft and final strategy maps and strategic plans.

The use of boundary groups, experiences, and objects is necessary to help communities of practice figure out what kind of strategic issues

the organization actually faces in relation to their environment, and what might be done about them. Really useful collective learning typically only occurs through careful design and use of settings for boundary experiences. These settings may be called, for example, “forums” or “learning forums” (Crosby and Bryson 2005; Moynihan and Landuyt 2009) or “holding environments” (Heifetz, Grashow, and Linsky 2009). The settings and experiences are needed to help groups figure out whether the issues involve simply reacting in an essentially pre-programmed way to changed circumstances, or require progressively more extensive reorientation, including, in order of deeper challenges, restructuring, redesigning, reframing, or even regenerating purpose (Khademian 2002; Scharmer 2009, 27–47). The deeper the required changes, the more necessary it is to have supportive leadership, skilled facilitation, and authentic engagement and dialogue among participants to discern the core of what is needed.

In addition, the deeper and more pervasive the needed changes, the more significant issues of individual and organizational identity become. The importance of identity in strategic planning has been recognized for a long time, but is probably seriously underappreciated in both practice and in the literature. For example, deeply shared articulations of *organizational* identity through action-oriented mission and vision statements are clear contributors to performance (Collins and Porras 1997; Weiss and Piderit 1999). Beyond that, practitioners and authors typically emphasize the importance of buy-in and commitment for strategic planning to be successful. However, the literature gives little attention to how to forge a shared identity out of *individual* identities other than to recommend participation and engagement. Eden and Ackermann (1998) and especially Rughase (2007) are among the few to develop both theoretical arguments and practical procedures for producing shared agreement on, and commitment to, a desired organizational identity and the strategies that flow from it. Tapping into individual identities is crucial, as Wenger notes: “because identification represents an investment of the self, it generates the social energy that sustains both our identities and our communities in their mutual constitution” (1998, 192). Identification also produces the extraordinarily powerful “feeling of knowing” that undergirds commitment, especially when faced with serious challenges (Burton 2008). In short, learning, meaning, and identity are at the heart of any practice. Indeed, Wenger argues that “[l]earning is the engine of practice, and practice is the history of that learning” (1998, 96).

Conclusions

Strategic planning is here to stay because the need for strategic thinking, acting, and learning will only increase, and strategic planning at its best helps foster them. I am much more *optimistic* regarding the future of strategic planning than I was 20-plus years ago, when Bill Roering and I argued that the normal expectation ought to be that strategic planning will fail, as typically its purpose is to change an organization, and so much has to go right for those

changes to happen (e.g., in terms of leadership, understanding the context, addressing the right issues, creating viable strategies, building an effective coalition, and so on) (Bryson and Roering 1988).¹⁰ Now I am *far* more sanguine—because there is so much widespread practical experience with managing effective organizational change in general, and with pursuing effective strategic planning in particular. Practitioners increasingly know what is involved in bringing about effective change and plan and act accordingly. In addition, there are now many skilled strategic planning consultants and facilitators whose talents may be drawn on when needed.

I also believe that academics are increasingly providing more useful guidance for improving strategic planning practice. This is attributable in large part to academics’ taking practice seriously as a topic for research and in developing methods for learning from secondhand experience. When strategic planning is viewed and researched as a *practice* engaged in by communities of practice, the result is a conception of strategic planning far broader than that on which most past research and writing on the subject is based, and much closer to how strategic planning actually is used. The knowledge to be gained from a focus on practice will always be situational and circumscribed, but nonetheless

is likely to be quite practically useful. The knowledge will take the form of “reason-based advice” to inform approaches or designs for strategic planning (e.g., Barzelay and Campbell 2003; Barzelay and Thompson 2009; Bryson 2004a; Campbell 2000).

Professional public affairs education also has an important role to play. The rise of strategic planning has been driven in part by the increase in coursework, workshops, and internships on the subject offered by schools of public affairs and administration. Here, too, an increased focus on the actual practice of strategic planning will help improve the field, particularly as academic knowledge is brought to bear explicitly on issues of how to learn from and improve practice (Posner 2009).

Finally, James Q. Wilson famously defined public management as “a world of settled institutions designed to allow imperfect people to use flawed procedures to cope with insoluble problems” (1989, 375). I think the evidence indicates that when strategic planning is seen as a practice that is improved by reason-based advice, it is one of the very useful ways in which imperfect people can cope pretty well with some of those “insoluble”

problems. I now believe that the future of strategic planning practice at its best is very bright indeed!

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Shindl. Carissa Schively Slotterback, Melissa Middleton Stone, Maarten van der Kamp, David Van Slyke, Ted Poister, Kaifeng Yang, and two extremely critical and helpful anonymous reviewers. The result is a completely rewritten and much improved essay, although I certainly remain responsible for its contents and any errors.

Notes

1. Strategic thinking, acting, and learning may be defined as follows: *Strategic thinking* is defined as thinking in context about how to pursue purposes or achieve goals. This also includes thinking about what the context is and how it might or should be changed; what the purposes are or should be; and what capabilities or competencies will or might be needed, and how they might be used, to achieve the purposes. *Strategic acting* is acting in context in light of future consequences to achieve purposes and/or to facilitate learning. *Strategic learning* is any change in a system (which could be an individual) that by adapting it better to its environment produces a more or less permanent change in its capacity to pursue its purposes (Bryson, forthcoming).
2. When most public and nonprofit officials say their organizations do strategic planning, it is not clear what their statements mean in practice, nor is it obvious that their practices mirror the defining characteristics of good strategic planning just mentioned.
3. This section draws on Bryson, Berry, and Yang (2010).
4. In the management literature, Feldman and Pentland have developed this idea in relation to a particular kind of practice, routines. They refer to the *ostensive* aspects of a routine-as-entity as the abstract patterns formed out of many performances. They refer to the *performative* aspects as what we observe: "real actions, by real people, in specific times and places." Of course, the ostensive and performative aspects are linked: The ostensive parts "are the embodied understandings of the routine that we act out in specific instances . . . [T]hey guide performances, and are used to account for and refer to performances." The performative parts "create, maintain, and modify the ostensive aspects of the routine"; in other words, actual performances can change what we think of as the "routine in principle" (2008, 302–3; see also Feldman and Pentland 2003, 2005).
5. Note that "a social mechanism is a fairly general, but only sometimes true, partial theorization of complex temporal phenomena in the social world" (Barzelay 2007, 527). Or in the words of Mayntz, in a widely cited article, "Mechanisms . . . 'are' sequences that occur repeatedly in the real world if certain conditions are given. . . . Mechanisms state *how*, by what intermediate steps, a certain outcome follows from a set of initial conditions. . . . The specification of causal chains is what distinguishes propositions about mechanisms from propositions about correlations" (2004, 214). Processes then may be viewed as "combinations and sequences of mechanisms that produce some specified outcome" (Tilly and Tarrow 2007, 203). Well-known mechanisms include competition, co-optation, the creation of us/them distinctions, diffusion processes, escalation of commitment, groupthink, and so on. See, for example, Barzelay (2003) and Tilly and Tarrow (2007).
6. The first edition of my strategic planning book (Bryson 1988) was written while I was on sabbatical at the London Business School during the 1986–87 academic year. Colleagues there insisted I speak with a senior leader of the British Civil Service College (now the National School of Government), because they thought she would want to hear about how strategic planning might help government departments. That 1987 conversation was very short, as she opened by saying, "There is no need for strategic planning in the Civil Service." As it turned out, there was no need for her continued services. The next year, the college became the first of the "executive agencies" created by the Margaret Thatcher government, meaning it now had to compete for students who previously had nowhere else to go. Because the funding followed the students, the college clearly had to pay attention to its newly empowered customers and get its strategies and offerings right. The leader who thought little of strategic planning was replaced,

and I began a 10-year run teaching strategic planning to the most senior civil servants, many of whom are now chief executives of agencies.

7. As Wenger notes, "The relation of design to practice is always indirect. It takes place through the ongoing definition of an enterprise by a community pursuing it. In other words, practice cannot be the result of design, but instead contributes a response to design" (1998, 233).
8. Some of these theaters will be modeled after Baltimore's CitiStat system (Schachtel 2001), in which key decision makers and analysts rely on prior analyses and graphic displays to make real-time assessments of issues and decisions about how to respond, followed by regular, disciplined follow-up and reassessments and redirections, as needed. The general form and nature of CitiStat-type practices are referred to as PerformanceStat systems by Behn (2008). More advanced theaters may resemble the decision theater at Arizona State University, which uses an interactive 3-D immersive environment built with cutting-edge graphics technologies to enable up to 25 decision makers to better "see" and understand the past and present, as well as predict the future of an issue (see http://www.decisiontheater.org/page/about_us/facility).
9. This last point also draws on Bryson, Berry, and Yang (2010).
10. We also asserted the existence of what we called "the paradox of strategic planning": it is most needed where it is least likely to succeed, and least needed where it is most likely to succeed (Bryson and Roering 1989). The paradox still exists.

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