Strategic Planning in University Sports Organizations (members of F.I.S.U.)

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DEDICATION

To countries such as Haiti which, despite facing natural and national disasters, participated in this research as a sign of its determination to move forward.

To those who inspire learning and progress.

ABSTRACT
Emmanouela Skoula: Strategic Planning in University Sports Organizations
(members of F.I.S.U.)
(With the supervision of Dr. Thanos Kriemadis, Associate Professor)

The core problem of strategic planning is understanding its multi-faceted character and interrelating different aspects of the strategic planning development. The study's primary purposes were to (a) determine the extent to which University Sports Organizations, members of International Sports Federation (F.I.S.U.), use strategic planning, (b) identify key factors discouraging strategic planning, c) determine the level of satisfaction in relation to predetermine performance indicators, d) develop a strategic planning process model for implementation by those Organizations, and e) examine relationships between the use of strategic planning and the variables: (1) organizations' model of governance; (2) percentage of students participating in competitions of the university sports organizations to the total number of students engaged in sport activities in higher education; and (3) the percentage of the organizations' self-generated revenues raised by University Sport Organizations as opposed to state funds. A questionnaire designed by Kriemadis (1992) has undergone some modification for this study. Factor analysis followed by Cronbach's reliability analysis, were employed in a pilot attempt to ascertain the multidimensionality of each construct and the internal consistency of the extracted factors. The repeated measures Anova, the chi-square test, the paired sample t-test and the t-test independent samples were used for the data analysis. The level of significance was set at 0.05. All 153 University Sports Organizations were surveyed. The response rate was 53.6%, of which 36.7% were classified as strategic planners and statistical significant differences arose between strategic and non-strategic planners regarding the planning processes. The major factor discouraging planning was insufficient financial resources (71.6%), while the level of satisfaction "to a great extent" did not exceed 70% of the organizations for any factor. A generic strategic planning process model has been developed to overcome the difficulties in formulating and implementing plans. This study may constitute the basis for further research in this area.

Keywords: planning, sports organizations, strategy, university athletic departments.

ΠΕΡΙΛΗΨΗ

Εμμανουέλα Σκουλά: Στρατηγικός Σχεδιασμός των Οργανισμών Πανεπιστημιακού

Αθλητισμού (μέλη της F.I.S.U.)

(Με την επίβλεψη του κ. Αθανάσιου Κριεμάδη, Αναπλ. Καθηγητή)

Σκοπός της έρευνας ήταν να: α) καθοριστεί το εύρος στο οποίο τα μέλη της Παγκόσμιας Ομοσπονδίας Πανεπιστημιακού Αθλητισμού (F.I.S.U.), χρησιμοποιούν στρατηγικό σχεδιασμό, β) αναγνωριστούν οι παράγοντες που αποθαρρύνουν τη χρήση του στρατηγικού σχεδιασμού, γ) καθοριστεί ο βαθμός ικανοποίησης των ανωτέρω Οργανισμών όσον αφορά στην αποτελεσματικότητα τους, δ) αναπτυχθεί ένα μοντέλο στρατηγικού σχεδιασμού και ε) να εξεταστεί η σχέση ανάμεσα στη χρήση του στρατηγικού σχεδιασμού και των μεταβλητών: (1) μοντέλο διακυβέρνησης των οργανισμών, (2) ποσοστό των φοιτητών που συμμετέχουν σε διοργανώσεις των Οργανισμών σε σχέση με τους απασχολούμενους φοιτητές σε αθλητικές δραστηριότητες της τριτοβάθμιας εκπαίδευσης και (3) ποσοστό των εσόδων αυτοχρηματοδότησης των Οργανισμών σε σχέση με την κρατική χρηματοδότηση. Το ερωτηματολόγιο που δημιουργήθηκε από τον Αθανάσιο Κριεμάδη (1992) επιδέχθηκε τις απαραίτητες τροποποιήσεις για τις ανάγκες της έρευνας. Παραγοντική ανάλυση χρησιμοποιήθηκε με σκοπό την εξαγωγή λανθανουσών μεταβλητών που εξηγούν τις υπάρχουσες συσχετίσεις των παρατηρούμενων μεταβλητών (παραγόντων). Ως δείκτης εσωτερικής συνέπειας χρησιμοποιήθηκε ο συντελεστής άλφα του Cronbach. Για την ανάλυση των δεδομένων χρησιμοποιήθηκαν το chi-square test, repeated measures Anova, t-test independent samples και το paired sample t-test. Το επίπεδο σημαντικότητας τέθηκε στο 0.05. Το ποσοστό ανταπόκρισης στην έρευνα ήταν 53.6%. Στατιστικά σημαντικές διαφορές βρέθηκαν, όσον αφορά τις διαδικασίες σχεδιασμού, ανάμεσα στους "strategic planners" (36.7%) και "non-strategic planners" (63.3%). Οι ανεπαρκείς οικονομικοί πόροι ήταν ο σημαντικότερος παράγοντας που αποθαρρύνει το στρατηγικό σχεδιασμό (71.6%), ενώ για κανέναν παράγοντα δεν ήταν ικανοποιημένοι οι οργανισμοί σε ποσοστό μεγαλύτερο του 70%. Ένα μοντέλο στρατηγικού σχεδιασμού δημιουργήθηκε και παρουσιάζεται αναλυτικά. Η παρούσα έρευνα είναι δυνατό να αποτελέσει τη βάση για περαιτέρω έρευνα στον τομέα αυτό.

ACKNOWLEDGEMENTS

TABLE OF CONTENTS

LIST OF TABLES

LIST OF FIGURES

I. STRATEGIC PLANNING IN UNIVERSITY SPORTS ORGANIZATIONS (MEMBERS OF F.I.S.U.)

Strategic planning embodies concepts from *competitive strategy*, *history*, *business practices*, and *organizational theory* (Alison & Kaye, 2005, pp.11). According to J.M.Bryson and Alston (2005), an organization engaged in strategic planning may both specify where it wants to be and manage the changes. J.M.Bryson and Alston (2005), support that strategic planning:

- Is a way of thinking, acting, and learning;
- It usually takes a comprehensive view by focusing on the "big picture", but it also leads to specific, targeted actions;
- It is often visionary and usually proactive rather than reactive;
- It is flexible and practical; and
- It is a guide for decision making and resource allocation. (pp.3).

Profit and non-profit organizations almost face the same challenges in recent years. Allison and Kaye (2005) argue that despite the fact that typically, nonprofit organizations represent public interest and for-profit organizations focus on customer satisfaction, quality improvement, and investments in market research; these diverse perspectives have almost converged. Strategic planning may have the same results in both sectors, helping organizations to clarify and settle the most vital issues they confront; to exploit the opportunities and transform the weaknesses and threats to challenges; and therefore to be effective as a whole (J.M.Bryson, 2004).

The higher education sector has already adopted systems from the business sector towards sustainability and efficiency (Martinez, 2007). Contemporary literature has recognized that strategic planning has not only offered great benefits to higher education institutions, but it is also an imperative requirement spawned from emergent new situations (i.e. Drew, 2006; Taylor & Machado, 2006; Earle, 2009; T.S. Williams, 2009; Nguyen & Frazee, 2009). Consequently, the management of higher education institutions has changed its perception about the aspects of a strategic planning process (Dooris, Kelley, & Trainer, 2004). Higher education institutions need to plan and

employ activities, in order to anticipate the financial constraints, the increased demand of both student and society as a whole, as well as to cope with the necessity for accountability, and quality delivered. The responsibility of academic institutions to provide knowledge and enable the student's to grow and develop, is becoming greater in a world moving extremely fast. This involves responsible leadership, continual progress, and sophisticated initiatives.

Higher education institutions' athletic departments face the same challenges as do universities. Demands are higher than ever, and responsibilities are greater than previously (Wickstrom, 2006). Constantly changing legislation, rules and regulations; financial concerns; human resources issues; recruitment of student – athletes are some of the challenges that prevail in the twenty-first century (Wickstrom, 2006).

National university sports organizations, being the authority representing the respective athletic departments of academic institutions, reflect the core principles of sports and development. Above all, a university sport organization is a multifaceted interdependent network which comprises several key players such as institutional bodies, authorities, stakeholders and shareholders, and interacts with society. Social progress and economic prosperity are an integral part of the actions and interactions of existing and future organizations. If university sports organizations are to be effective and viable, they must plan their actions, analyze the environment they compete in, develop strategies to meet their mission and objectives, and periodically evaluate their progress and performance. Strategic planning may be a visual path that illustrates the means, the motive, and the knowledge needed to reach organizational excellence.

1.1. Purpose of the Study

The primary purpose of the study is: a) to determine the extent to which the strategic planning process is being used in University Sports Organizations (members of F.I.S.U).; b) to identify the key factors that discourage University Sport Organizations (members of F.I.S.U.) from engaging in strategic planning activities; c) to determine the level of satisfaction of University Sports Organizations (members of F.I.S.U) in relation to predetermine performance indicators; d) to develop and recommend a generic strategic planning process model, which can be implemented by University Sports Organizations (members of F.I.S.U.); and e) to examine the relationship between the extent of strategic planning used by University Sports

Organizations (members of F.I.S.U) and these selected variables: (a) the organizations' model of governance (public vs. private vs. cooperative); (b) the percentage of students participating in competitions of the university sports organizations to the total number of students engaged in sport activities in higher education; and (c) the percentage of the university sports organizations self-generated revenues as opposed to state funds.

1.2. *Research Questions*

The research questions to be examined for the purpose of this study were as follows:

1.   What is the extent to which the strategic planning process is being used in University Sports Organizations (members of F.I.S.U.)?

2.   What are the key factors that discourage University Sports Organizations (members of F.I.S.U.) from engaging in strategic planning activities?

3.   What is the level of satisfaction of University Sports Organizations (members of F.I.S.U.) in relation to predetermine performance indicators?

4.   Is it possible to develop a generic strategic planning process model, which can be implemented by University Sports Organizations (members of F.I.S.U.)?

1.3. *Hypotheses Tested*

1.   The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the organizations' model of governance (public vs. private vs. cooperative).

2.   The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of students participating in competitions of the university sports organizations to the total number of students engaged in sport activities in higher education.

3.   The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of self-generated revenues as opposed to state funds.

1.4. *Delimitations*

The study was delimited to the University Sports Organizations members of International University Sports Federation (FISU). Data for this study were only collected from University Sports Organizations as defined by the International University Sports Federation (FISU).

The study was also delimited to a questionnaire appropriate for identifying the following functions of the strategic planning process in a university sports organization: a) vision, mission, goals and objectives of the university sports organization; b) external environmental analysis; c) internal environmental assessment; d) long-rang planning; e) short-range planning; and f) evaluation of the strategic planning process.

1.5. *Limitations*

The limitations of the study were recognized as follows:

1.   The respondents' honesty, accuracy, and objectivity when completing the questionnaire.
2.   The respondents' degree of knowledge on planning terminology.

1.6. *Basic Assumptions*

1.   Strategic planning is a necessary function of every organization in university sports sector.
2.   The questionnaire will be suitable for identifying the functions of the strategic planning process in University Sports Organizations.
3.   The respondents will be the most qualified executives in their respective university sports organization to complete the questionnaire.

1.7. *Definition of Terms*

Strategic Planning: Allison and Kaye (2005) defined strategic planning as "a systemic process through which an organization agrees on – and builds commitment among key stakeholders to – priorities that are essential to its mission and are responsive to the

environment" (pp.1). Strategic planning may assist in determining the acquisition and allocation of resources to achieve the organizations' objectives and priorities (Allison & Kaye, 2005).

Strategy: Papadakis (2007), claims that strategy may be defined as the coordinated actions and collective decision-making that set long-term direction, define the range of actions, minimize uncertainty, satisfy market demands and stakeholders' expectations, position an organization against competition, achieve a balance between the external environment and the internal capabilities, and hence create sustainable competitive advantage. According to J.M.Bryson and Alston (2005), strategy may be defined as "a pattern of purposes, policies, programs, projects, actions, decisions, and resource allocations that defines what an organization is, what it does, and why it does it. Strategies can vary by level, function, and time frame" (pp.97).

Stakeholders: A stakeholder may be defined as any individual or group "who cares or should care, about organization", "has a stake in the success of its mission", "could contribute unique and valuable perspectives", and in general, anyone that "must implement the strategic plan", "benefit from its implementation", and may influence its implementation (Allison & Kaye, 2005, pp.39-40). A stakeholder is "any person, group, or organization that can place a claim on the organization's resources, attention, or output or is affected by its output (J.M.Bryson & Alston, 2005, pp.53).

Strategic plan: A strategic plan is a broadly acceptable statement, which comprises organizations' vision, mission, and values statements. It also outlines goals, objectives, and desired outcomes; strategies and their purpose. Moreover, it is a detailed guide of the course of actions decided on for the accomplishment of all strategic issues (J.M.Bryson & Alston, 2005).

Vision: Vision is about organizations' future direction and aspiration, an image about how the organization will be in the future that guides the mission and strategy (Papadakis, 2007; Dervitsiotis, 2005). A vision statement allocates "what is the organization's aspiration about the future" (Papadakis, 2007, pp.162).

Mission: The mission states the general goal an organization aims to achieve, defining the relationship among other enterprises and organizations (Papadakis, 2007); as well as translating the general philosophy into clearly defined and tangible goals (Oakland, 2001). A mission statement is a powerful expression of "what and where our business is now; as well as what and where it will be in the future" (Papadakis, 2007, pp.162).

Environmental assessment: Is the analysis of an organization's internal strengths and weaknesses; and external opportunities and challenges or threats (J.M.Bryson & Alston, 2005).

Strengths: This refers to the internal factors that reflects an organization's abilities, and responds to the question "What do we do well?" (Allison & Kaye, 2005, pp.136). Additionally, strengths can be viewed as resources and capabilities that enable the accomplishment of an organization's mission, goals and objectives, and create public value (J.M.Bryson & Alston, 2005).

Weaknesses: This is the insufficiency in resources or capabilities that obstruct an organization's ability to achieve its goals and objectives, accomplish its mission, and create public value (J.M.Bryson & Alston, 2005). Defining an organization's internal weaknesses may answer the question "Where can we improve?" (Allison & Kaye, 2005, pp.136).

Opportunities: External trends that an organization may take into account to better achieve its mission (Allison & Kaye, 2005), opportunities are external factors or situations that an organization can take advantage of in order to improve mission results, achieve its goals and objectives, or create public value (J.M.Bryson & Alston, 2005).

Threats: These are negative external factors or situations that may hinder an organization to accomplish its mission, meet its goals and objectives, and create public value (J.M.Bryson &b Alston, 2005). Threats may provide an answer to the question "What changes in the environment do we need to guard against or prepare for in doing our work?" (Allison & Kaye, 2005, pp.136).

Capabilities: Papadakis (2007), defines capabilities as an organization's tangible and intangible resources, which reflect its ability to act directly to existing situations and unforeseen circumstances.

Competencies: That is, "capabilities, set of actions, or strategies at which the organization is particularly good, or the resources (broadly conceived) on which it can draw to perform well against its critical success factors" (J.M.Bryson & Alston, 2005, pp.83).

Critical Success Factors: Critical success factors may be viewed as the most important sub-goals or minimum key factors that an organization must have or needs, to be capable of achieving its mission (Oakland, 2001). J.M.Bryson and Alston (2005), state that critical success factors are "things the organization must do or the criteria it

must meet in order to be successful in the eyes of its stakeholders, especially those in the external environment" (pp.83).

Key Performance Indicators: They are indicators that measure progress toward the achievement of certain goals, with respect to the characteristics of an organization (Shahin & Mahbod, 2007)., Key performance indicators may be viewed as being quantifiable indicators of success in terms of the mission and critical success factors, based on the appropriate data collection (Oakland, 2001).

Strategy Formulation: The process of developing the organization's culture, policies, values, vision, mission, and long-term objectives; conducting external environmental assessment and evaluating internal weaknesses and strengths; and establishing long-term strategies; while periodically revising / reconsidering the values, vision, mission, and long-term objectives (Kriemadis, 1997).

Strategy Implementation: Strategy implementation is the execution stage of a strategic planning process. It is the process of establishing short-term objectives and strategies in order to accomplish long-term objectives and strategies (Kriemadis, 1997).

Strategy Evaluation: This is the process of reviewing internal and external factors, measuring performance, and taking corrective actions; to ensure that the short and long term objectives are being achieved (Kriemadis, 1997).

Self-assessment: A framework or a methodology for continuous monitoring and improvement of an organization as a whole (i.e. Oakland, 2001; Tari, 2008).

N.U.S.F.: This stands for the National University Sports Federation. It is the national governing body of university sports of each country.

F.I.S.U.: This stands for the Federation International du Sports Universitaire (International University Sports Federation). F.I.S.U's main responsibility is supervising both Summer and Winter "Universiades" in addition to the World University Championships. Furthermore, F.I.S.U. undertakes the organization of Forums and Conferences. It comprises a General Assembly (F.I.S.U.'s main governing body), representing the members (153 National University Sports Federations). The Executive Committee is elected by the General Assembly for a four year period, and is responsible for the successful operation of the FISU. The Executive Committee is advised by ten permanent commissions in their respective fields. (www.fisu.net).

Universiades: The "Universiade" is an international sports and cultural festival which is held every two years in a different city. (www.fisu.net).

World University Championships (WUC): These championships are a series of meetings and competitions that complete the program of the Universiades. (www.fisu.net).

F.I.S.U. Forum: These forums are held every two years in different locations, promoting subjects involving education, culture and sport, through Forum seminars. (www.fisu.net).

F.I.S.U. Conference: Taking place at the same time as the Universiade, the Conference combines the sporting aspect with sociological study and scientific research. (www.fisu.net).

1.8. *Significance of the Study*

Public and private sector organizations collaborate and compete in an ever dynamic and turbulent environment. As in the for-profit sector, the changes occurring in the non-profit highlight the necessity to shift towards issues of accountability, building capacity, and organizational performance (Allison & Kaye, 2005). Globalization, technological innovations, continuing increased demands, rapidly changing competitive environments, and knowledge transformation are some of the aspects contemporary organizations are facing. "Changes anywhere typically result in changes elsewhere" (J.M. Bryson, 2004, pp.4). Berry (2007), argues that "demands for accountability have never been higher" (p.331); and that managers need to focus on improving systems and strategies. Leaders, managers, and planners need to be precise in the way they modify the processes to certain situations (J.M.Bryson, 2004). Strategic thinking and decision-making should be placed in a systemic framework in order to outline the journey for achievement. Planning is mainly concerned with goal setting and finding the means to achieve these goals (VanWoerkum, Aarts, & De Grip., 2007). The core problem of strategic planning is the difficulty in realizing its multi-faceted character, and the need to interrelate different aspects of strategic planning development (Vila & Canales, 2008).

Strategic planning is a way of knowing (J.M.Bryson, Crosby, & J.K Bryson, 2009); that provides a systemic process to gather information about the big picture (Poister & Streib, 2005); creates a forum of discussion (Allison & Kaye, 2005), delivers integration within an organization (Jarzabkowski & Balogun, 2009), enables futuristic thinking (Poister & Streib, 2005), and challenges the mind (Lake, 2004), to create

effective strategies (Gunn & Williams, 2007), as well as to anticipate and respond effectively to new circumstances (Kriemadis, 1992, 1997).

Despite the contribution of current strategic planning literature to both for-profit and non-profit sectors, a gap still exists in the sports sector and above all, in the university sports sector. This highlights the need for such a study, which may constitute the basis for further research in this area.

This study will contribute to heightening the university sports organizations' awareness of the extent to which the strategic planning process is used in this sector, as well as the key factors that may discourage university sports organizations from engaging in a strategic planning process. By providing information and feedback the study will determine the degree of satisfaction concerning the university sports organizations outputs. The study will identify probable pathways to overcome the difficulties encountered during the formulation and implementation of plans. A generic strategic planning process model may be developed, to be implemented by University Sports Organizations (members of FISU). Finally, this study may be useful to University Sports Organizations, and to the sport sector as a whole.

1.9. *Organization of the Study*

The statement of the problem, research questions, delimitations, limitations, basic assumptions, definition of terms, significance of the study, and organization of the study are defined in Chapter I. The review of literature is presented in Chapter II. Chapter III presents the methods and procedures utilized in the collection and analysis of data collected. Chapter IV presents an analysis of data collected, and the findings. Finally, Chapter V summarizes the study, and presents the discussion and recommendations based on the findings of the study.

II. REVIEW OF RELATED LITERATURE

This chapter presents a review of literature related to the field of strategic planning. The first section presents an overview of the framework and value of strategic planning. The second section describes and analyzes the strategic planning process. The third section focuses on strategic planning in higher education and the fourth section presents strategic planning in intercollegiate and university sports.

2.1. *The Framework and Significance of Strategic Planning*

The notion of strategy is not clearly defined, because of the differing points of view on most of the key issues of the term (De Wit & Meyer, 2004). The origin of the term strategy comes from the Greek word "strategia" meaning "the art and science of being general" (Kriemadis, 1992, p.15), formed from the words "stratos" meaning army and "-ag" meaning "to lead" (Evered, 1983, as cited in Grant, 2002, p.16; Papadakis, 2007, pp.30). The concept of strategy has its roots in military strategy, underlining the importance of both planning and acting in an effective way (Kriemadis, 1992). Many principles of military strategy have been applied to business situations, such as the capability to respond effectively to threatening and unpredictable situations of the external environment. Through the assessment of the offensive and defensive strategies undertaken, the element of surprise is gained (eg. Evered, 1983, as cited in Grant, 2002). When comparing war and businesses planning several similarities emerged (Keller, 2008). Keller (2008) identifies the main similarities between war and businesses planning: *a) understanding the nature of conflict; b) comprehension of the opponent's intentions; c) knowledge of one's capabilities and deficits as well as the challenger's; d) awareness of the battle ground; e) ability to shape a coherent and executable strategy; f) mastery of logistics; g) belief in the righteousness of one's cause; h) intimate connection with one's suppliers, customers and staff and i) conviction to win the battle* (p.133). However, unlike war, business operation benefits the employees, stakeholders, society and the economy in general (Keller, 2008).

A brief overview on the evolution and meaning of strategy will provide a better understanding about the complexity and comprehensiveness of the concept. Bowman, Singh, and Thomas (2002) argues that after the trend of emphasizing the insight and the decision-making capabilities of management executives, an in depth analysis of the elements of strategy and the strategy process, may provide essential feedback enabling the development of a "processual" approach to strategy and the establishment of planning systems. Today, strategy involves a full range of planning systems (Katsioloudes, 2002). Systems need to be regarded as a part of continual improvement (Oakland, 2001). In the previous decades, economists emphasized the impact of structural characteristics, such as profitability rates, investment choices, economies of scale and scope, barriers to entry, growth patterns, on the development of strategies of competing organizations (Bowman et al., 2002). The globalization and the transformation of a static environment to a more dynamic one, as well as the continuously changing technology (Porter, 2008; Kipley & Lewis, 2009), render the need of being different to confront competition, absolutely necessary (Porter, 2008). Grant (1991) argues that business strategy should be viewed more as an ongoing process of gaining competitive advantage. It should not be regarded only as a relation between planning activities and cost-effect. An effective business strategy should be based on the interaction among resources, capabilities, sustainable competitive advantage and profitability (Grant, 1991). Nevertheless, Porter (2008) underlines that globalization has already changed the business environment. Firm's inadequacy to achieve comparative advantages (i.e. lower-cost) may lead to a competitive disadvantage. New advancing technology has enabled firms to reduce or overcome the weaknesses of comparative advantage (Porter 2008). Consequently, the development of competencies strengthens the organization's competitiveness (Grant, 1991, 2002; Keller, 2008), and allows the organization to survive in its environment, as an open system that includes the kind of necessary interaction to create quality (Black, Hinrichs, & Fabian 2007). Keller (2008) asserts that an organization's core competencies may be classified in three major categories, such as superior technological capability, reliable processes, and close relationships with external shareholders. However, Madu (2005), emphasizes that an organization should effectively link all the part of the supply chain with the processes related to the product and the services to be delivered. An effective strategy can not be achieved if the organization's systems are unavailable and unreliable.

Recent literature in the field of services analyzes strategies, and methods of developing a systemic model of decision making in order to provide new services and innovative products, necessary for effectiveness and efficiency (Stevens & Dimitriadis, 2005;

Larsen, Tonge, & Lewis 2007). In addition, it is indicated that in order to achieve corporate strategy, functional strategies should be established and above all, both strategic and marketing analysis should be undertaken for an organization to be proactive rather than reactive (Wilson & Gilligan, 2005). The organization's performance is influenced by the consistency and interaction of all the functional strategies established (Rhee & Mehra, 2006). Furthermore, in present literature there is a shift in the way the aspects of strategic planning are perceived. More specifically, current trends i.e. intelligence marketing (Al-Hawari & Ward, 2006), human resources management, quality service technologies and service design (Al-Marri, Ahmed, & Zairi 2007), add more value to the functional level strategies. New directions of strategy making have been developed, taking into consideration factors that can significantly affect the organization's output. Service loyalty (Han, Kwortnik, & Wang, 2008) and customer satisfaction in terms of reliability, effectiveness and assurance (Arasli, Mehtap-Smadi, & Katircioglu, 2005; Glaveli, Petridou, Liassides, & Spathis, 2006; Petridou, Spathis, & Glaveli, 2007) are among the factors that mostly concern organizations in the field of services.

Many authors outline the term "strategic flexibility" as the way to rapidly adapt to changing situations, to set new rules in the business environment, and to obtain better results in dynamic and competitive environments (e.g. Harrigan, 1985; 2001; Hitt et al., 1998; Aaker & Mascarnhas, 1984; as cited in Tamayo-Torres, Ruiz-Moreno, & Verdu, 2009). However, Nadkarni and Narayanan (2007) assert that strategic flexibility is effective in industries where a high rate of changes occurs. Moreover, Rudd, Beatson, and Lings (2008) argue that flexibility is both imperative and beneficial for an organization when changes in operational, financial, structural and technological issues are needed.

Several research studies have been conducted in order to analyze the relationship between strategic planning and strategic flexibility. Especially, Rudd et al. (2008) analyzing a structural equation model found that operational and financial flexibility mediate the influence of strategic planning on financial performance, while structural and technological flexibility mediate the influence on non-financial performance. Porter (2008) supports that strategic flexibility may help organizations effectively respond to the competitive and market changes.

Porter (2008) argues that an analysis of the organization's internal and external environment should precede decision-making and actions. Benchmarking may lead to best practices and core competencies' exploitation may enable to circumvent the competition. However, the more the competitors incorporate similar improvements in quality, cycle times,

or supplier partnerships, the more difficult it is for each to stand out. In addition, the effort to overcome the competition based solely on the operational effectiveness may be detrimental. Superior performance can be achieved only with the appreciation of both strategy and operational effectiveness (Porter, 2008).

In recent years many organizations have failed to establish a balance between efficiency, i.e the relationship between input and output usually with a short-term horizon, and effectiveness, i.e. the organization's accomplishment of goals regarding the desired competitive position (Wilson & Gilligan, 2005). Moreover, firms have been burdened by their inadequacy to utilize management tools, such as quality management, partnering, time-based competition, change management, reengineering, in order to gain sustainable profitability (Porter, 2008).

Strategies represent the transformation from strict plans towards more comprehensive and flexible strategic processes (Steurer, 2007). Five dimensions related to the concept of strategy have been identified, indicating that strategy is a plan, a ploy, a pattern, a position, a perspective (Mintzberg, 2000; Mintzberg, Lampel, Quinn, & Ghoshal, 2003; also cited in Papadakis, 2007). The Mintzberg's "5 ps", suggest that strategy is not only a specific and documented statement that guides an organization towards the future, but it is also a way of developing both a competitive advantage and emerging actions. This can be accomplished through consistency in behavior over time, through a more sophisticated process of defining the way an organization operates and through the determination of the key issues that an organization needs to confront (Mintzberg, 2000; Mintzberg et al. 2003; Papadakis, 2007). Through a different perspective, Grant (2002) underlines that strategy is should not be viewed as a detailed plan of guidance, but on the contrary, it should be viewed as a comprehensive link between goals and values, resources and capabilities, along with structures and systems.

Furthermore, strategy should not be only viewed as individual tasks efficiently performed, but as concept which involves significant policies, major actions and "true" goals that determine the whole organization's effectiveness. Strategy is unpredictable and its results are unidentified in advance. Effective strategies depend on the ability to be coordinated, to control actions and to assess the components that fulfill the main values of a well-formed strategy (Mintzberg et al., 2003).

However, Courtney, Marnoch, and Williamson (2009) assert that many organizations tend to consider strategic planning more as a data presentation rather than as an important process involving major goals needed to be achieved. Courtney's et al. (2009) results in a research conducted in the non-profit sector indicate the difficulty to identify both a single

score of associations' effectiveness and what constitutes high performance achievement. Mintzberg et al. (2003), underline the necessity of being "at least intellectually tested against the proper criteria", i.e. *clarity, motivational impact, internal consistency, compatibility with the environment, appropriateness in light of resources, degree of risk, match to the personal values of key figures, time horizon, workability*. Moreover, a need is stressed to accomplish the following fundamental issues: a) "clear and decisive objectives, b) concentration and superiority in power, c) flexibility (reserved capabilities and maneuverability to use the minimum resources required), d) coordinated and committed leadership for each of major goals, e) secrecy and intelligence to face properly the unexpected times, and f) secure resources bases and vital operation points to develop effective and sufficient systems" (pp. 15-16).

Strategy can be viewed as a process leading to winning, through consistency in decisions which can help both establish a long-term direction and set up the culture that can create the motivation for outstanding performance (Grant, 2002). Besides, strategy refers to the "method of achievement; a planned operation in the execution of a project" (Katsioloudes, 2002, p. 14). Plans have to be implemented in order to produce desired results, define the direction and activities of an organization and focus on important priorities regarding the organization's long-term success. It is imperative for an organization to seek the opportunities to better accomplish the organization's mission (Allison & Kaye, 2005) and to achieve mission priorities and to manage the change (Berry, 2007). However Wilson and Gilligan (2005), assert that conflicting forces such as day-to-day pressures and an indefinite organizational culture may constrain the changes required. An effective strategic planning process that includes "the planning of a mission, the setting of objectives, and the implementation of strategies and control systems to ensure the objectives are achieved, may lead to indirect improvements in performance by enhancing the effectiveness of management throughout the organization" (Dincer, Tatoglu, & Glaister, 2006, p.208). Following the same direction, J.M.Bryson and Alston, (2005) assert that the increase in both effectiveness and efficiency (i.e. achieving the same or better results with fewer resources) enables the performance to be enhanced, mission to be furthered, mandates to be met, real public value to be created and rapidly changing circumstances to be effectively confronted.

Gavetti, Levinthal, and Rivkin, (2005) indicate that choices may affect the economic success of the firm, and therefore reposition a firm to a higher level or position a firm to a novel business environment. Considering an organization's business status, Porter and Millar

(2008) underline that the revolution in information technology affects both competition and competitive positioning of a firm in three vital ways:

- It changes industry structure and, in so doing, alters the rules of competition;
- It creates competitive advantage by giving companies new ways to outperform their rivals; and
- It spawns whole new businesses often from within a company's existing operations. (pp.74).

Hence, Porter and Millar (2008) suggest not underestimating information technology as a key issue to develop strategy.

Plant (2009) asserts that an indispensable part of a positioning effort is the influence of trade-offs and choices which will define what an organization can cope with. Specifically, Mintzberg et al. (2003) argue that strategic positioning reflects the trade-off rules that affect the way that individual activities should be planed and be integrated in the planning process. A single planning cycle is inadequate and a decade horizon is necessary. Crompton (2009) identifies four complementary repositioning strategies for an organization to be effective: a) *real repositioning*, meaning the development of new services and the restructuring of existing services; b) *associative repositioning*, meaning to align other organizations that already possess the desired position; c) *psychological repositioning*, meaning to change stakeholders' beliefs about the outcomes that come from the services offered; and d) *competitive repositioning*, meaning to alter stakeholders' beliefs about what a competitor does (p.92). Stakeholders seams to be catalytic for a great range of decision making. Enticott and Walker (2008) recognize stakeholders to range from individual service users to local community groups, including local authority staff, local businesses and other publicly funded agencies. Furthermore, Akingbola (2006) argues that non-profit organizations have external stakeholders such as other funders, client volunteers, community groups and citizens. Dervitsiotis (2005) underlines that both a necessary created value for the stakeholders and an organization's commitment to a long-term direction, are vital for effective strategy making.

From a different perspective, the origins of superior competitive positioning may lie in the key players' cognitive skills and leading presence in the world of business. Educational background has also been identified as a main factor in understanding how decisions are made. Moreover, existing knowledge should be viewed with a critical eye (Gunn & Williams, 2007). Gavetti et al. (2005) highlight the value of taking into account management experience in combination with a valid system for categorizing and classifying past and present

knowledge. The heart of a strategic planning process is people. Gibbons and O'Connor (2005), assert that inadequate knowledge and insufficient managerial expertise may discourage formal strategic planning. J.M. Bryson et al. (2009) basing their findings on the related literature, conclude that strategic planning is best viewed as a *way of knowing*, meaning to "promote strategic thinking, acting and learning; improve decision making; and improve organizational performance" (p.201). Strategic thinking identifies the possibilities and opportunities rather than the problems and barriers, as well as the important characteristics rather than urgent tasks (Lake, 2004). This therefore creates effective strategies (Gunn & Williams, 2007). Lake (2004) also referred to the term "strategic thinking" as a way of challenging the mind which leads to mastering the "real art" of strategic planning. The task of management or key players is to make analytical choices that will result in the firm's high performance (Gavetti et al., 2005; Vila & Canales, 2008).

Jarzabkowski and Balogun (2009) argue that communication and participation within planning processes are unlikely to arise simply from bringing people together. Top management has to focus on seeing through the aspirations of people within an organization, and integrate them into a united organizational purpose (Vila & Canales, 2008). Furthermore, world-class leadership and commitment (Oakland & Tanner, 2007), along with perseverance in engaging in strategic planning, can be identified as key factors for the effectiveness and creation of public value (Berry, 2007). J.M.Bryson and Alston (2005) argue that a firm should assign a key leadership position before engaging in a strategic planning process. Leadership ability is needed to guide and direct the firm. It also plays a significant role in both planning and policy (Delaney, 2009). "Effective leadership starts with the chief executive's vision" (Oakland, 2001, pp.5).

The term organizational excellence emerged in the later literature, referring to how an organization can understand each activity and involve each individual at each level, and thus improve the competitiveness, effectiveness and flexibility through planning (Oakland, 2001). Oakland (2001) argues that achieving organizational excellence requires, among other things, commitment to continual improvements, to a policy and strategy, along with undertaking the necessary changes. Commitment and implementation of a policy, along with continuous monitoring and ongoing improvements, may result in better production or service operations (Oakland, 2001). In addition, Oakland (2001) points out the influence of organizational excellence on providing a framework consisting of the organization's vision, a guiding philosophy, core values and beliefs, a purpose and a mission, as well as the culture of an organization i.e. beliefs, behaviors, norms, dominant values, rules and the climate in the

organization. Katsioloudes (2002) underlines that a profound understanding of both national and organizational culture will enable the participants in the strategic planning process to handle the change on a more sophisticated level. Additionally, it is necessary that an organization's multiculturalism should be managed in such a way that *minds are opened, innovation is encouraged, flexibility is increased, and speed is maximized, so the social system becomes more efficient and more effective* (Katsioloudes, 2002, pp.34).

The vision driving the mission and strategy is the organizations' future direction and aspiration, an image about how the organization will be in the future (Dervitsiotis, 2005; Papadakis, 2007). The mission states the general goal an organization aims to achieve, defining the relationship among other enterprises and organizations (Papadakis, 2007), as well as translating the general philosophy into clearly defined and tangible goals (Oakland, 2001). Brews and Purohit (2007) argue that fulfilling a mission statement may be more destructive than effective because of the time needed to complete it. However, Green, Medlin, and Linn (2005) argue that a mission statement strengthens an organization in terms of quality, thereby likely to improve organizational performance. The findings of Dincer et al. (2006) indicate that about three-quarters of the firms in the sample have a mission statement. Strategic planning is "the set of processes undertaken in order to develop a range of strategies that will contribute to achieving the organizational direction" (Tapinos, Dyson, & Meadows, 2005, p 371). More specifically, Allison and Kaye (2005) argue that a successful strategic planning process generates understanding of the mission and values within an organization. It creates a discussion on the purpose of an organization's existence and prepares the whole organization for meaningful changes by both stimulating strategic thinking and bringing everyone's attention to the organization's long-term success.

Research conducted in the manufacturing and service sector found that over 75 per cent of the sample examined have a set of medium/long term objectives (Dincer et al., 2006). However, their research emphasizes that firms in the sample have a relatively short time horizon across most dimensions of planning. Nevertheless, effective strategic planning links long-range strategic goals with both mid-range and operational plans (Wilson & Gilligan, 2005; Dincer et al., 2006). Other research indicates that a significant number of those deploying formal strategic plans, are short-term oriented rather than long-term (less than three years), and have failed to specify goals and objectives. A very small proportion identified contingency plans and assessed the external environment. However the respondents have failed to recognize the resources necessary for the development of their strategic and functional plan (O'Regan & Ghobadian, 2007). Formal strategic planning may help

organizations to gather and analyze structured information and data, as well as to clearly define its goals and objectives.

Ghobadian, O'Regan, Thomas, and Liu (2008) identify several factors characterizing the formality of a strategic plan:

- It covers a number of years in the future;
- It specifies objectives and goals;
- It develops short-term plans for major functional areas of the firm;
- It identifies future resource requirements;
- It requires ongoing monitoring and modification;
- It attempts to scan environment;
- It is regular; and
- It has predefined flow of information. (p.5).

Consequently, recent literature indicates a distinction between the implementation and effectiveness of formal and non-formal planning. Mintzberg (2000) identifies planning as a "formalized procedure to produce articulated result, in the form of an integrated system of decisions" (pp. 31). Especially, according to Mintzberg (2000) formalization seems to mean "to decompose, to articulate and to rationalize the processes by which decisions are made and integrated in organizations" (pp.13). Additionally, Ghobadian et al. (2008) highlight that a "formal strategic planning process is analytical, systematic, and deliberate" (p.2). However it is essential to adopt the view that a strategic planning process should involve both formally collected data and innovative perception (Ghobadian et al., 2008). In contrast, Linn (2008) argues that it is not important to conduct a formal strategic planning process as the result may be financially imprudent. Ghobadian et al. (2008) conducted a research study within small-medium enterprises, in an effort to detect the relationship between formal strategic planning and performance, and the differences between "planners" and "non-planners". Findings of their research study indicate that despite the fact that differences between planners and non-planners were not statistically significant, firms performing a high level of formal strategic planning achieved better results than firms with a low or medium level. Firms deploying a written strategic plan, on average, performed better than firms not engaging in a written strategic plan. However, the relationship between formal strategic planning and performance was not statistically significant in general. Other external factors related to competitive pressure or the tendency of small-medium enterprises to focus on the "means" and not on the "ends" may have influenced this result. However, Wang, Walker, and Redmond (2007)

having a more practical point of view, assert that many businesses are not "entrepreneurial", and thus they are not growth-oriented. The findings of their research indicate that, by not pursuing profit and growth maximization, the levels of strategic planning are low or even non existent. Despite differing opinions about the influence of formality on the organization's effectiveness, most of the research indicates that formality is a highly significant factor. Specifically, a study by O'Regan and Ghobadian (2007) concluded that: a) in formal strategic planning, greater emphasis placed on the competitive position and trends than in non-formal planning firms, b) formal planning firms place greater emphasis on obtaining the relevant and adequate information available in comparison to non-formal planning firms, c) formal planning firms place greater emphasis on the use of analytical assessment techniques than non-formal planning firms, who base their assessment techniques more on instinct, d) formal strategic planning firms are more aware of the need for staff creativity for the achievement of greater competitive advantage, and e) formal planning firms stress the need for reviewing activities and using the monitoring processes to achieve this.

Using formal strategic planning, which is based on an evaluation of an organization's environment, leads firms to deal more successfully with barriers. Wang et al. (2007) indicate the need to identify and overcome barriers (i.e. lack of time, lack of experience, inadequate knowledge of planning processes, reluctance to share strategic ideas, employees and others, environmental turbulence, size of business, type of industry, internal implementation barriers, business life cycle) in order to understand the extent to which they have adopted a strategic plan. Several studies have been conducted for strategic planning concerning formality. The findings of research conducted in SMEs by Ghobdian et al. (2008) show that organizational size affected the use of a written strategic plan. However both the size and the sector of an enterprise wherever it operates did not influence the formality of the plan. Gibbons and O'Connor (2005) support that formal strategic planning may be limited because of both insufficient managerial expertise and knowledge of the process. This view is extended by Ghobadian et al. (2008) who identified the core processes of a strategic plan as inadequate. This can be rectified by establishing the factors which need to be appreciated by decision-makers and determining whether the planning which has been developed leads to better performance. Brews and Purohit (2007) state that strategic planning includes adaptive flexibility and innovation, which are considered necessary given the unstable environments an organization operates in. In this sense Brews and Purohit (2007) view strategic plan to be more forward thinking than strictly formal planning processes. Strategic planning provides a systematic process for assembling information about the "big picture" and provokes futuristic

thinking. Moreover, strategic plans are used to institute a long-term direction and then interpret that direction into specific goals, objective analysis, and actions that will ensure the organization's vitality and effectiveness in the long run (Poister & Streib, 2005). Kaplan and Norton (2008b) further state that an organization that has a system of formal strategy execution may result in a success rate three times greater. In general, "a higher degree of formalization is related to a higher degree of performance" (Kraus, Harms, & Schwarz, 2006, p.341).

Even many organizations which operate in common organizational fields, adopt heterogeneous management practices (Delmas & Toffel, 2008). Successful strategic planning relies on broad-based support and participation by organizational constituents (Welsh, Nunez, & Petrosko, 2006). Furthermore, Sandholm (2005) identifies some similarities between businesses with a different background, ownership, and work organization. Some of the similarities identified by Sandholm (2005) are that every business has a task, there is potential for improvement in every business and leadership is necessary to realize the potential for improvement. However, Jarzabkowski & Balogun (2009) highlight the role of strategic planning to deliver strategic integration within organizations. Their research findings show that different interests and experiences in communicative and participative activities seemed likely to lead to only a partial integration. The same authors assert that markets with more experience and intra-organizational power, considered that the planning process undermined their existing position as strategy formulators, as opposed to markets with lower experience and intra-organizational power where the planning process was perceived to have strengthened their position as strategy implementers. This can also apply to integration within an organization, although it is imperative the management promote a culture in line with strategic planning.

Consequently, O'Regan and Ghobadian (2007) define formal strategic planning as a written strategic plan unlike non-formal planning which is an unwritten strategic plan. These authors state that the "written and unwritten plans" are factors which can be used as measure indicators of formality. Their research findings reveal that firms developing formal strategic planning processes face almost the same amount of barriers as those developing non-formal strategic planning processes. The former is better prepared to meet any potential problems with greater confidence. Nevertheless, O'Regan and Ghobadian (2007) suggest that strategic planning formality could be a significant factor for comparative advantage and for concentrating on alternative factors, such as entrepreneurial style of management or personal characteristics of the key players. A written strategic plan should cover at least three years

into the future, specify objectives and goals and consider alternative strategies and action plans for the functional areas of a firm. It should also identify allocations and resources required to support selected strategies and develop procedures for anticipating the status of the firm on a continual basis as well as analyzing the immediate environment of the firm (O'Regan & Ghobadian, 2007)

Apart from the literature outlining the benefits of strategic planning, criticisms also exist. Aldehayyat and Anchor (2008) identify that the main criticism in the strategic planning literature have been that creativity may be negatively affected preventing strategic thinking, and that bureaucracy, financial mismanagement and control based on the results, eventually discourage organizations to seek new strategic directions. Van Woerkum et al. (2007) argue that planning should be part of an organization's daily activities. It should have an intellectual dimension; enhance openness to new ideas, actions and cognition. It should promote intrinsic motivation, while avoiding *localizing* and *privileging*. Consequently, the organization becomes more creative with all the members actively participating. Without planning, creativity is out of control and without creativity, planning is an "empty vessel" (Van Woerkum et al., p 862). Yet, Allison and Kaye (2005) argue that strategic planning is barely a predictable and conventional process, rather it is a creative process which needs to be flexible. Still, strategic planning should be translated into annual operating plans with assumptions made about the future and which are monitored to ensure their validity within a changeable environment (Allison & Kaye, 2005).

The need for planning in the business sector has become greater in the twenty-first century. However, Elbanna (2007) recognizes environmental uncertainty to be a significant obstacle to planning. New and complex business environments, as well as economic, technological, social and political influences (Cole, 1997), underline the necessity of expertise, knowledge, flexibility and continuous improvements. Deming (2000) argues that *substantial improvement must come from a change in the system* (pp.310), defining the system as "a network of interdependent components that work together to try to accomplish the aim of the system" (Deming, 1994, pp.95). However, Mason (2007) argues that to cope with changes in the system, a balance should be kept between chaos and structure. Furthermore, Mason (2007) argues that reliability and consistency of strategy making lie in a framework that include, "adaptive innovation", within certain limits ("the edge-of-chaos"). Strategy making should be undertaken according to the needs of an organization in a changing environment. An integral part of decision making is the degree of flexibility and adaptability an organization has in order to anticipate environmental change. Moreover,

Mason (2007) claims that an appropriate organizational structure aligned with the organization's vision or identity can encourage and enable change. In relation to this, Oakland and Tanner (2007) underline that change must be translated into operational issues, so people in the organization are able to cope with the challenge.

Each organization faces a different level of turbulence. The work of Kipley and Lewis (2009) validates Ansoff's typology of the five *distinct identifiable levels of environmental turbulence:*

1.   The first level is defined as "stable", where there is no change in the environment thus the future will be similar to the present; hence planning is extrapolative.

2.   The second level is defined as "expanding", where change is slow, incremental, visible and predictable, hence planning is also extrapolative.

3.   The third level is defined as "changing", where although change is fast, it is still incremental and fully visible.

4.   The fourth level is defined as "discontinuous", where visibility is limited, predictability is partial, change is rapid and reaction to the new change within the time required is insufficient. In order for a firm to be successful at this level, it must abandon its historical attachment to particular customers, technologies and products, and formulate its strategy with a new set of rules.

5.   The fifth level is defined as "surpriseful", where change occurs without notice, without visibility, without predictability and change is extremely rapid. In order for a firm to be successful at this level, it must be open and flexible to creating products and services with advanced innovative technological ideas.

The fourth and fifth levels, are not "history driven" (as opposed to the first three levels), thus future success is not guaranteed. (p.8).

Kipley and Lewis (2009) assert that enterprises that compete globally are probably included in the fifth level of Ansoff's typology. Accordingly, in their research, a two step method is identified to formulate a strategy in order to ensure effectiveness:

1.   The first step is for senior level managers to complete a segmentation of the firms Strategic Business Areas (SBA), and to identify in which business areas the firm currently competes, what possible new SBA management can envision, and to view the whole environment as a field of future needs which any competitor may choose to address.

2.   The second step is for managers to identify the growth potential, profitability and expected turbulence level for each of the SBA.

Each SBA will require its own unique strategy and managerial competencies (p.10).

All the same, Allison and Kaye (2005) argue that different types of planning, such as strategic planning, long-range planning, business planning and operational planning, often overlap, thus the authors clearly define the differences. Business planning should be incorporated into strategic planning and it is expected to fulfill not only strategies and goals, but also detailed (at least three years worth) financial projections, investment opportunities. Business planning should clearly define the relationship between money and mission. Operational plans are short-term (less than a year), providing details about daily implementation of strategic decisions concerning "who" and "how" will accomplish the organization's mission, goals and objectives necessary to support core strategies. In contrast, long-range plans focus on setting long-range objectives (three to five year), and assume the future to be predictable following both the current trends and knowledge about future conditions, as well as assuming that plans are sufficiently reliable. Kipley and Lewis (2009) argue that long-range planning *clarify past experiential data to define future goals, and extrapolates both future revenues to determine budget and profits, and future programs*. However, the future success of strategic planning can not be *guaranteed based on historical success* (pp.11-12).

Many companies assert that the purpose of planning is to accomplish plans and undertake budgets (Vila & Canales, 2008). However, Allison and Kaye (2005) argue that strategic planning incorporates using the resources to accomplish organization's mission in the best possible way. Planning is perceived to be a continuous process that considers a variety of possible futures and emphasizes strategy development based on the assessment of its internal and external environment. What is more, the strategic planning approach integrates a profound understanding of critical issues and priorities, ensures goal alignment and enables the task of linking the strategy with policies for daily actions at lower levels (Vila & Canales, 2008). Strategic planning concerns the overall direction rather than specifying objectives to accomplish day-to-day activities (Allison & Kaye, 2005; Dincer et al., 2006). Furthermore, strategic planning tends to be based on the assumption that an organization must face an environment that is "dynamic and hard to predict". This highlights the importance of decision making in positioning an organization effectively (Allison & Kaye, 2005, pp.7; Wilson and Gilligan, 2005). Plant (2009) assert that there is no ideal position, but rather a variety of activities chosen as the best to better position the organization.

Research on the implementation of strategic planning has come to a number of conclusions. Specifically, Akingbola (2006) study of non-profit organizations reveals that

strategic planning was one of the fundamental issues influencing their adaptation strategies. Additionally, strategic planning success is based on the evaluation of the firm and the contingency plans that results from the assessment of the economic, technological, political, social and competitive environment (Papadakis, 2007), prior to the creation of the process (Harris & Ogbonna, 2006). Continued success is dependent on the review and improvement of existing strategies (J.M.Bryson & Alston, 2005); as well as on the selection of alternative strategies (Akingbola, 2006). Vila and Canales (2008) argue that the issue is not the value added by strategic planning, it is the extent to which strategic planning furthers the organization's common purpose. However, J.M.Bryson and Alston (2005) claim that the need for strategic planning emerges if an organization is to compete, survive and prosper and if real public value is to be created. Still, the authors refer to the "ABCs" theory of strategic planning, as a way of both viewing and describing the process. J.M.Bryson and Alston (2005), underline three fundamental questions to pursue throughout its strategic planning process:

A. *Who and what are we, what do we do now, and why*? The answer to this first question defines the organization's current condition. Information is documented and many new insights emerge.

B. *What do we want to be and do in the future*? This question helps all of the members and other stakeholders to identify the organization's desired direction.

C. *How do we get from here to there*? The answer to this question minimizes the gap between the organization's current position and desired image in the future. The gap consists of the strategic issues the organization needs to address by formulating and implementing strategies and actions that respond effectively to these issues (pp.5-6).

The first step towards creating and implementing a strategic planning process is to accomplish an assessment of the organization's ability to perform a strategic planning process. Then an initial agreement about the planning effort is made, organizational mandates are clarified, and inclusive stakeholder analysis is identified i.e. internal and external stakeholder analysis, key stakeholder analysis (J.M.Bryson & Alston, 2005).

2.2. *The Strategic Planning Process*

Allison and Kaye (2005) state that strategic planning is a systematic process which an organization agrees on and which builds commitment among key stakeholders. It is a means of helping an organization to focus on its vision and priorities that are essential to its mission

and responsive to the environment. *Strategic planning is systematic in that it calls for following a process that is both structured and data based* (Allison & Kaye, 2005, pp.1).

References in the recent literature demonstrate the use of particular intangible elements throughout the strategic planning process, such as the culture of an organization comprising its beliefs, behaviors, norms, dominant values, rules and its climate (Katsioloudes, 2002). Moreover, a shared vision (Dervitsiotis, 2005; Papadakis, 2007; Mason, 2007; Kaplan & Norton, 2008; Plant, 2009; Kantabutra & Avery, 2010); consensus on a mission (J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Green et al., 2005; Slater, Olson, & Hult, 2006; Dincer et al., 2006; Berry, 2007; Kaplan and Norton, 2008; Plant, 2009); commitment to policies (Oakland, 2001; Vila & Canales, 2008; Delaney, 2009); establishment of long-term objectives (Grant, 2002; Wilson & Gilligan, 2005; Allison & Kaye, 2005; Kaplan & Norton, 2008); and the assessment of an organization's internal and external environment (Wilson & Gilligan, 2005; Linn, 2008; Porter, 2008; Kaplan & Norton, 2008; Valkano, Anastasiou, & Androutsou, 2009), are an integral part of strategic planning.

Research conducted by Poister and Streib (2005) focusing on the use of strategic planning in municipal governments, indicates that 92% of respondents reported the development of goals and objectives; 89% stated the development of a vision; 78% reported a review of their organization's mission and the development of action plans; 72% identified the stakeholders' needs and concerns; 71% reported the development of strategic agendas; 60% conducted an evaluation of the organization's internal environment; 57% progressed to the assessment of organization's external environment; 53% of respondents clarified the organizations' mandates, and a smaller percentage conducted a feasibility assessment of proposed strategies (36%). Poister and Streib (2005) assert that the findings illustrate that although the respondents perceived the strategic planning process as being mission driven, with a focus on the future, as well as goal setting and initiating plans for implementation, the respondents merely focused directly on external mandates and thus failed to assure the successful implementation of their strategic plans. Plant (2009) proposes a holistic strategic planning model, based on the assumption that all of the elements of the system are interrelated and interdependent. The four key elements the author proposes, are to develop a strategic *vision involving public and staff input*; develop and prioritize strategic *goals* and *initiatives* aligned with the vision; develop departmental *business plans* aligned with the strategic plan; and *measure and report results* (p.38).

A number of authors state that initial planning activities include a framework comprising an organization's guiding philosophy, the establishment of organization's vision

and mission, and long-term objectives, interfused with the organization's shared culture, values and beliefs. It is then necessary to determine whether these are achievable. An in-depth analysis of the internal and external environment in which an organization collaborates and competes is needed to ensure that mission and objectives are responsive to rapidly changing circumstances. This will also enable identification of the critical success factors, the core processes and the priorities are balanced with strategic issues that support the creation of feasible plans and strategies (i.e. Oakland, 2001; J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Kaplan & Norton, 2008). In addition to the above, Kaplan and Norton (2008) underline the necessity of translating the strategy to classified objectives linked to performance metrics.

However, J.M.Bryson et al. (2009) argue that specific steps in the strategic planning process are not particularly significant if people do not comprehend how the process is used to promote strategic thinking, acting, learning and awareness.

Dyson, Bryant, Morecroft, and O'Brein (2007), identify the term "strategic development process" as being appropriate for the processes that enable and sustain strategic decisions. According to Dyson et al. (2007), the fundamental and comparable elements for strategic development are:

- Setting strategic direction – encompassing a vision, mission, strategic objectives and goals;
- Designing a performance measurement system aligned to the strategic direction;
- Sense-making – exploring the internal and external environments and assessing the uncertainties;
- Creating strategic initiatives formed by strategic direction, strategic goals, the internal and external environments and learning from virtual performance;
- Evaluating options using models of the organization, taking account of future uncertainties;
- Rehearsing strategy in a virtual feedback process that incorporates learning from virtual performance; and
- Selecting and enacting strategy in a real feedback process that incorporates learning from virtual and / or current performance. (pp.14).

Dyson et al. (2007), underline that "*direction* encompasses setting the vision / mission, strategic objectives, performance measures and targets"; "*creation* may encompass sense-making, visioning and strategic initiative / option development"; and "*rehearsal, evaluation*

and *choice* would cover exploring, testing, revising and selection leading to the enacting of strategy" (pp.14).

Notwithstanding the above, in order for the strategic planning process to be effective, three general and integral stages are identified. The first stage is strategy formulation; the second stage refers to strategy implementation and the final stage concerns strategy evaluation (Kriemadis, 1992, 1997; J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Acur & Englyst, 2006; Slater et al., 2006; Plant, 2009).

Based on the related literature the strategic planning process may comprise the following steps:

1.   Espouse and establish the culture (i.e. Oakland, 2001; Katsioloudes, 2002); the policies (Oakland, 2001; Delaney, 2009); the core values, the beliefs (Oakland, 2001) and the guiding philosophy (i.e. Deming, 2000; Oakland, 2001). An organization should incorporate a vision (i.e. Oakland, 2001; Dervitsiotis, 2005; Papadakis, 2007; Mason, 2007; Kaplan & Norton, 2008); a shared mission (i.e. Oakland, 2001; J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Green et al., 2005; Slater et al., 2006; Dincer et al., 2006; Berry, 2007); long-term goals and objectives (i.e. Grant, 2002; O'Regan & Ghobadian, 2007); as well as long term objectives linked to innovations and relationship goals (Kaplan & Norton, 2008).

2.   Execute internal and external environmental assessments in order to identify the strengths, weaknesses, opportunities and threats (i.e. De Witt & Meyer, 2004; Wilson & Gilligan, 2005; Kaplan & Norton, 2008; Linn, 2008; Porter, 2008; Valkanos et al. 2009). An organization should identify its core competencies and capabilities (i.e. J.M.Bryson & Alston, 2005; Dincer et al., 2006; Black et al., 2007; Kaplan & Norton, 2008; Keller, 2008; Vila & Canales, 2008).

3.   Identify critical success factors aligned with key performance indicators in order to define what an organization must accomplish to achieve the mission. Core processes must be understood in order to define what needs to be done so that an organization fulfills its critical success factors (Oakland, 2001; Kaplan & Norton, 2008). Each objective should be linked to performance metrics (Kaplan & Norton, 2008).

4.   Formulate long-range strategies (i.e. Dincer et al., 2006; O'Regan & Ghobadian, 2007) to accomplish organization's mission and objectives (i.e. J.M.Bryson & Alston, 2005; Allison & Kaye, 2005).

5.   Establish long-range objectives and strategies linked to both mid-range and short-range objectives and strategies, and ensure that strategies respond effectively to the

strategic issues (i.e. J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Wilson & Gilligan, 2005; Dincer et al., 2006; Kaplan & Norton, 2008; Plant, 2009).

6. Periodically measure and evaluate performance through a comprehensive assessment of the strategic planning process (i.e. Oakland, 2001; J.M.Bryson & Alston, 2005; Tapinos et al., 2005; Poister & Streib, 2005; Dincer et al., 2006; Slater et al., 2006; Acur & Englyst, 2006; Nadkarni & Narayanan, 2007; Papadakis, 2007; Norton & Kaplan, 2008); and continuously test the strategy (Norton & Kaplan, 2008).

Some authors refer to the formulation stage of strategic planning as *formation*. Specifically, Slater et al. (2006) argue that an *effective strategy "formation" capability is valuable when it enables the firm to create strategies that increase its effectiveness and efficiency* (p.1221). Moreover, Slater et al. (2006) assert that the strategy formation process ranges from informal and emergent to formal and deliberate. However, Kaplan and Norton (2008) state that emergent strategies are based on a comprehensive analysis of the internal data and the competitive environment, as well as innovative ideas. Hence, another cycle of strategy translation and operational execution will begin, altering the existing strategy.

Papadakis (2007) highlights the substantial interdependence between strategy formulation and organizational structure. This interdependence may define how objectives and policies are established, as well as how the resources available are distributed. This may also enable coordination and commitment to each of the strategic goals which leads to active participation in the organization's mission. (Papadakis, 2007). From another point of view, Chin, Chan, and Lam (2008) identify several critical success factors for a successful "coopetition" (meaning cooperation and competition to facilitate the formulation of effective action plans). These CSFs include management commitment (i.e. a leadership-driven mission, vision, policy; long-term commitment); relationship development (i.e. common goals and mutual organizational culture; knowledge and risk sharing); and communication management (i.e. information system support; conflict management systems).

Above all, J.M. Bryson et al. (2009) argue that it is essential to adopt the appropriate methodology in order to gain a profound understanding of whether a strategic planning process should be implemented in specific circumstances, and how. J.M. Bryson et al. (2009) reviewing the recent literature determined the "Actor-Network Theory" to be appropriate in tracing "associations" beyond network linkages. Associations include *shared understanding*, *affective responses*, *identity-based or identity-forming linkages*, *agreements*, *commitments*, *resource flows*, or other *causal connections* (p.178). This theory enables the firm to *organize participation*, *create ideas for action*, *build a coalition*, *implement strategies*, *examine*

specific performance of people, detect the way that *aspects of strategic planning may affect performance*, as well as the way that *performance sustains or changes the actor's view of the ostensive aspects of strategic planning* (p.180).

A number of techniques are indicated in the related literature which may assist firms to be more accurate when designing strategic plans. J.M. Bryson et al. (2009) basing their findings on the example of "MetroGIS" (an organization created to promote sharing of geospatial information among public organizations), identify strategy maps and diagrams as beneficial for the application of the processes (i.e. sustain long-term financing, data sharing systems) and the enhancement of strategic thinking on mission, principle guidelines, goals, strategy, core services and functions.. Also strategy maps and diagrams further strategic initiatives (strategic projects), and create the approved organizational structure (i.e. coordinating committee). Several factors also need to be taken into account, such as: a) how and why a specific process is forward, b) what are the particular circumstances, c) who is involved, d) what are the relevant associations, e) what are the results of a specific strategic planning process and f) how the knowledge gained through its implementation is utilized in the planning of actions (J.M. Bryson et al., 2009).

Notwithstanding the above, strategy formulation affects an organization's strategic actions and decisions (Acur & Englyst, 2006). Kaplan and Norton (2008) declare that throughout strategy formulation, managers decide on a course of action that will create a sustainable competitive advantage, and that in turn will lead to superior financial performance. Specifically, the strategy must respond to the following questions:

1. Which costumers or markets will we target?
2. What is the value proposition that distinguishes us?
3. What key processes give us competitive advantage?
4. What are the human capital capabilities required to excel at these key processes?
5. What are the technology enablers of the strategy?
6. What are the organizational enablers required for the strategy? (p.6).

Most importantly, capabilities should embody the organization's strategy to enable their usage as evaluation standards of strategy effectiveness (Papadakis, 2007). Having analyzed the concept of strategic planning as well as its significance for management, it can be supported that human capital is fundamental in strategic planning. The capabilities of the human capital are necessary to excel at the key processes which give an organization competitive advantage (Kaplan & Norton, 2008).

Kaplan and Norton (2008) propose utilizing a variety of models and frameworks as strategy formulation proceeds.

2.2.1. *Strategy Formulation.* As stated in the related literature the culture, values, policies, vision, mission, and long-term objectives of the organization are vital in the strategic planning process. Oakland (2001) argues that achieving world-class performance improves competitiveness and effectiveness. The organizations become more flexible throughout planning process. For this to occur, responsibility for commitment to organizational excellence must be accepted. "Total organizational excellence will influence the culture and provide a vision framework comprising its philosophy, core values and beliefs, a purpose and a mission" (pp.5).

Organization's culture. Culture is a *fascinating concept* that has a powerful force on all stakeholders in the strategic planning process and in the international business environment (Katsioloudes, 2002). Katsioloudes (2002) asserts that individuals and institutions must integrate cultural awareness and skills into their relations, strategies and structures. Mohammed, White, and Prabhakar (2008) state that weaknesses in dealing with the complexity of different cultures and the anticipated organizational culture may result in poor employee motivation, low staff retention, marketing ineffectiveness and loss of competitive advantage. However, Gerhart (2008) does not agree that national culture acts as a constraint on organizational culture. On the other hand, Soares, Farhangmehr, and Shoham (2007) support the influence of culture on the marketplace and marketing.

Oakland (2001) asserts that organizational culture may be formed by a number of factors (pp.8):

- behaviors based on people interaction;
- norms resulting from working groups;
- dominant values adopted by the organization;
- rules of the game for "getting on"; and
- the climate.

Oakland (2001) also states that culture incorporates the beliefs which encompass the organization about how business should perform and how employees should behave and perform towards the common goals and objectives, as well as how they should be treated. Shared values and beliefs which can lead to the development of norms and rules of behavior are dimensions of an organization's culture (Mello & Stank, 2005). Specifically, the

dimensions of organizational culture may influence the level and the frequency of creativity and inspire the unfettered flow of new ideas (Alves, M.J. Marques, Saur, & P. Marques, 2007).

Research conducted on 350 staff teams of Medical Sciences Universities, indicates that in modern organizations the necessity of turning the traditional culture to a culture based on participation, teamwork, and innovative development has emerged (Hamidi, 2009). Hemmelgarn, Glisson, and James (2006) in particular, argue that cultural change may affect the service provided (i.e. service quality and service outcome); the human resources strategies and performance (i.e. rewards, expected outcome from one's work behavior); and the adoption of new technologies.

Mello and Stank (2005) stress the influence of an organizational culture towards the effectiveness of long-range strategies. They argue that consistency between internal corporate culture and external supply chain culture may result in the ability to enhance value and reduce costs associated with value delivered. Notwithstanding that, an organization's identity stems from a framework of changes governed by the organizational culture (Ravasi & Schultz, 2006).

More significantly, new perspectives such as learning and growth (i.e. expand and build strategic skill and expertise, develop leadership and execution-driven culture, enable and require continuous learning and sharing of knowledge) that Kaplan and Norton (2008) identify, may create a high-performance culture.

Core values and beliefs. The core values and beliefs may be viewed as the organization's basic principles about what is important in business, its conduct, its social responsibility and its response to changes in the environment. These core values and beliefs should be incorporated into a mission; defining who the organization wants to be (Oakland, 2001); and therefore set the organization's fundamental guidelines (Kaplan & Norton, 2008). Kaplan and Norton (2008) assert that values stipulate the attitude, behavior, and character of an organization; and can be viewed as the path that will guide organization's actions. Leadership plays a crucial role in setting the values of an organization. Honesty, empowerment and encouraging personnel in order to participate are some of the most prominent perspectives an effective leadership may encompass (Hamidi, 2009). Furthermore, Deming (2000), underline that for a company to be effective, everybody should be encouraged, by allaying fear, promoting knowledge and having leadership oriented to change.

Oakland (2001) asserts that core values and beliefs should be regarded as guiding forces, which focus on employees, suppliers, costumers, society as a whole, safety, shareholders and stakeholders in general.

Several research studies analyze the way management shift thinking and move toward a more respectful attitude concerning the key stakeholders and the world (Basu & Palazzo, 2008) and the effect of personal values on the role of ethics and social responsibility (Shafer, Fukukawa, & Lee, 2007). Bratianu and Balanescu (2008) state that values is a process linked to corporate social responsibility, in which ethical values outline the framework of decision making processes. The transformation of management also comprise innovation and creativity, as endogenous factors related both to internal characteristics and to elements of organizational culture such as shared values and beliefs (Alves et al., 2007). A study of 33 research and development teams indicates that innovation is enhanced only when the climate for excellence is favorable (Eisenbeiss, Van Knippenberg, & Sabine, 2008). Effective leadership provides a framework where core values and clear beliefs are integrated to accomplish organization's mission, common goals and objectives (Oakland, 2001). However, researchers in recent literature (i.e. O'Reilly, 2000; Bourantas, 2005; as cited in Papadakis, 2007, pp.615-616) argue that "shared values" and their alignment with management practices are of primary significance, meaning that companies adopt a value-based view of strategy. Nevertheless, Brinckerhoff (2009) asserts that values and ethics start within and work outward. Furthermore, Brinckerhooff (2009) proposes that to benefit the organization, a value statement must be included in all of the developed processes. However Allison and Kaye (2005) assume that values usually focus on service, quality, people, and work norms.

Finally, Brinckerhoff (2009) underlines that a value statement should focus on key values given that people will usually focus only on these values, must be shared with everyone and further discussed. It is imperative that staff input should be acknowledged periodically. Value statements should be judged on their implications, and not simply on our self interest (Brinckerhoff, 2009). A written statement of organizational values may facilitate stakeholders' commitment and create alliances between individuals and institutions (Allison & Kaye, 2005). A value statement defines how an organization may perform (J.M.Bryson & Alston, 2005).

Policies.   Chin et al. (2008) assert that policy reflects management's attitude. Oakland (2001) argues that a chief executive of an organization should take on the responsibility and commitment to an accepted policy. Policies generate responsibilities for interactions between all the functions, and thus need to be communicated to all employees at all levels and

departments. Oakland (2001) points out that every organization, in order to achieve performance excellence should define its policy on quality and enable continuing improvement. A set of requirements furthered by the top management has been identified (Oakland, 2001):

a) establish an "organization";

b) identify the costumer;

c) identify the costumer's needs and perception of needs;

d) assess the ability of the organization to meet these needs economically;

e) ensure that acquired materials and services reliably meet the required standards of performance and efficiency;

f) concentrate on a philosophy of prevention rather than detection of problems;

g) educate and train for improvement; and

h) review the management systems to maintain progress (pp.7).

Vision. "The vision stretches many years into the future" (Allison & Kaye, 2005, pp.7). Kaplan and Norton (2008) define vision "a concise statement that defines the mid-to long-term (three to ten years) goals of the organization" (p.2). However, in recent literature vision and mission statement often overlap. Kantabutra and Avery (2010) emphasize the necessity of defining vision that may affect the way it is adopted. Bratianu and Balanescu (2008) identify vision to be an idealistic prediction in an uncertain future, seeking a mature and successful position; although it must be clearly defined within the context of business dynamics. According to Dervitsiotis (2007) vision depicts the organization's future, sets general goals and portrays the desirable future image, as well as directing the organization's strategy and mission.

Plant (2009) identifies vision to be the first step in the holistic strategic framework that the author proposes. The organization's vision should be associated with the strategic goals and initiatives constituted to implement the vision and should take into account all relevant stakeholders (Plant, 2009). The vision should "integrate the individual contribution in knowledge, intelligence and values from all employees, and become a driving force for increasing the potential of all organizational intellectual capital" (Bratianu & Balanescu, 2008, p.21).

From another point of view, Kantabutra and Avery (2010), based on previous research conducted (i.e. Kantabutra & Avery, 2007; Kantrabutra, 2008b, as cited in Kantabutra & Avery, 2010), highlight that certain characteristics of a powerful vision may induce customer and employee satisfaction. A powerful vision is characterized by *conciseness*, *clarity*,

abstractness, *challenge*, *future orientation*, *stability*, and *desirability* or the *ability to inspire* (p.38). Furthermore, other factors are significant, such as communicating the vision within the organization, aligning organizational processes and systems to match the vision, motivating the staff, as well as empowering others to act toward achieving the vision. Kantabutra and Avery (2010) assert that a leader should espouse a vision that:

- it is brief (so that it can be remembered and repeated easily;
- it contains a prime goal to achieve;
- it can encompass all organizational interests;
- is not a one-time, specific goal that can be met, and then discarded;
- it provides a source of motivation for employees to do their best by including a degree of difficulty or stretch (e.g. to achieve a national / international status);
- it offers long-term perspective for the organization and indicates the future environment in which it will function;
- it is unlikely to be changed by market or technology changes; and
- it is viewed as desirable by employees. (p.43)

These characteristics of vision are expected to govern higher performance outcomes, initially through costumer and employee satisfaction (Kantabutra & Avery, 2010). A vision statement can be used to set priorities, and also help inspire the board and staff of an organization (Allison & Kaye, 2005).

Mission statement. Bratianu and Balanescu (2008) assume that an organization's mission differs from its vision. Unlike vision, a mission unifies the organization's social objectives with the source of competitive advantage.

Slater et al. (2006) assert that "mission set broad outlines for strategy development, while allowing for specific details to emerge" (p.1222). Slater et al. (2006) argue that a mission includes organizational purpose, scope of market activities, and competitive distinctiveness. Mission can be viewed as a firm's purpose. It is usually a brief statement defining the organization's existence, especially the products or services offered (Kaplan & Norton, 2008). Bratianu and Balanescu (2008) assume that a company exists because it must create value for customers and satisfy their needs. Nevertheless, Slater et al. (2006) assume that mission may specify, to some degree, the target customer, the principal products, and markets. In addition, Dervitsiotis (2007) argues that mission may define the relationship between the firm and other organizations. Notwithstanding the above, Bratianu and Balanescu (2008) underline that a mission statement should take into consideration the

management of stakeholders, ranging from the owner, employees, customers, suppliers, different governmental agencies to the community and society as a whole.

Brinckerhoff (2009) recognizes that in some countries a mission statement may also have important legal implications. In some countries, related business income and services, should be included in the mission statements. Despite the above, Brinckerhoff (2009) proposes that a mission statement should reflect the core values (i.e. the firm can be accessed by the community, high quality services are provided, different culture values are respected). There should be a value statement in every document (i.e. annual reports, board manual, staff personnel policies, strategic planning e.t.c.), and to be used as a daily tool. Assessed and reviewed every year or tow, a value statement can therefore be changed if necessary. Therefore flexibility should not be restricted.

Generally, Brinckerhoff (2009) asserts that a mission statement reveals both current position and desired position in the next three to five years. Similarly, Allison and Kaye (2005) state that a mission statement should include the purpose (what an organization is trying to achieve), and the business (what organization does). It should also be communicated to its stakeholders and to the public. Oakland (2001) argues that a mission statement is usually long term, and may be short term if the general purpose of an organization is its very existence. However, Oakland (2001) argues that if an organization's existence is threatened, the focus will not be on long-term planning initially. In this case the path to excellence and high performance may be constrained. Above all, the mission signifies the way in which vision can be transformed into tangible existence for the company (Bratianu & Balanescu, 2008) and provides uniqueness to an organization (Oakland, 2001).

In recent literature several perspectives have arisen and several studies focus on the organization's capacity to transform not only the mission but also the vision and core values (i.e. Bratianu & Balanescu, 2008). Green et al. (2005) motivated by the related literature which assert that there is no evidence of a positive relationship between a mission statement and company performance, they designed a process to examine the possible improvement of an organization's mission statement in terms of both completeness and quality. The process was applied in an effort to revise the existing mission statement of both a university and a business school. Findings of their research indicate that in both the university and business school, the mission statement was strengthened in terms of both completeness and quality. A successful implementation of the mission statement evaluation process may improve the performance by improving organizational focus. Namely, mission improvements, if necessary, are crucial for an organization's survival (Green et al., 2005). A mission "

provides the necessary guidance for developing strategy; defining the critical success factors; searching on key opportunities; making resource allocation choices; and pleasing stakeholders" (Bratianu & Balanescu, 2008, p.22).

Bratianu and Balanescu (2008) assert that some general characteristics may comprise a "good" mission such as depicting the organization's vision, to *incorporate the core corporate values, to be feasible, understandable and concise; to be generous in stating the company goals*; to have a *semantic impact on stakeholders*; and to have a *good literary formulation* (p.22). Nevertheless Oakland (2001) argues that a mission statement should be not only understandable, but also communicable, believable, and usable.

Finally, a mission statement may include:

- The role or contribution of the business or unit (i.e. profit generator, service department, opportunity seeker);

- The definition of the business (i.e. the needs the organization satisfy or the benefits it provides). Not being too specific or too general;

- The organization's distinctive competence (this should be a brief statement that applies to the organization the specific unit). A statement which could apply equally to any organization is unsatisfactory; and

- Indicators for future direction; a brief statement of the principal things the organization would give serious consideration to (Oakland, 2001, pp.25).

Oakland (2001), stresses that if the "mission statement is wrong, everything that follows will be wrong too" (pp.26).

Long-term objectives. "The set of objectives are the very heart of planning process. It is the prelude to the development of strategies and detailed plans" (Wilson & Gilligan, 2005, pp.271). An objective supports the achievement of goals (Allison & Kaye, 2005). Wilson and Gilligan (2005) argue that a complex interaction at different levels of an organization, as well as other external factors, may influence the development of specific objectives. By setting the objectives an organization enables the provision of a common sense of direction (Wilson & Gilligan, 2005). However Collis and Rukstad (2008) argue that companies may confuse their statement of values or their mission with their strategic objectives. Strategic objectives should be specific, measurable and time-based (Allison & Kaye, 2005; Collis & Rukstad, 2008), as well as linked directly to goals (Berry, 2007). According to this opinion, Shahin and Mahbod (2007) assert that the objectives not only have to be specific, measurable and within a time frame that may provide a structure and allow for

the evaluation of their progress, but also to be realistic and result-oriented. This will enable the evaluation of resource availability and the appropriate selection of key performance indicators to measure the achievement of certain goals; thereby ensuring the balance between attainability, challenge and aspiration. Collis & Rukstad (2008) assert that strategic objectives drive today's business decisions and drive the business for over about five years. However, Shahin & Mahbod (2007) emphasize that the timeline or completion date should be part of the goal setting. Setting goals and specifying objectives may guide the organization's efforts, as well as support the distribution of resources focusing on the organizations success (Shahin & Mahbod, 2007). Wilson and Gilligan (2005) state that long-term objectives provide the framework within which more detailed objectives of the operational level are developed, and thus are conducive to the achievement of the overall corporate goals.

Establishing a long-term direction needs to be followed by transforming that direction into specific goals and objectives (Poister & Streib, 2005). The choices of these objectives have a profound impact on the firm (Collis & Rukstad, 2008). Shahin and Mahbod (2007) state that specific and challengeable objectives result in higher performance than do moderate and easily attainable goals. An organization should consider feasibility and progress in achieving objectives and goals, but also should consider continuous improvement (Fryer, Antony, & Douglas, 2007), forward thinking, objective analysis and evaluation of goals and priorities, seeking future actions that will guarantee the organizations sustainability and effectiveness in the long run (Poister & Streib, 2005).

Environmental Assessment. After the mission, vision, and values have been established, the critical success factors have been identified in order to respond to what an organization needs to achieve, an organization's internal and external analysis is conducted.

Kaplan and Norton (2008) state that an organization may analyze its external environment using frameworks such as Porter's five forces (*bargaining power of buyers; bargaining power of suppliers; availability of substitutes; threat of new entrants; and industry rivalry*); it may also assess the macroeconomic environment of *growth, interest rates, currency movements, input prices, regulations, and general expectations of the corporation's role in society*. This analysis is also known as PESTEL, meaning *political, economic, social, technological, environmental*, and *legal* factors (p.5). Kaplan and Norton (2008) indicate that an assessment of the organization's capabilities and performance may be undertaken in order to analyze the internal environment of an organization. The use of Porter's value chain model enables the identification of an organization distinctive resources and the categorization of capabilities concerning processes developed in order to create

markets, products and services. Finally, Kaplan and Norton (2008) identify the necessity of analyzing the internal strengths and weaknesses, as well as the external opportunities and threats of an organization through the so called S.W.O.T. analysis.

Wilson and Gilligan (2005) argue that each business needs to evaluate its environment on a regular basis. However, they also declare that an assessment of the organization's principal strengths and weaknesses, as well as its competitors' capabilities emerges by comparing the fundamental and secondary factors of analysis. Many organizations fail to link their strengths and weaknesses to key success factors and to recognize and clearly comprehend competitors' capabilities, and do not develop strategies to convert the weaknesses into strengths and the threats into opportunities (Wilson & Gilligan, 2005). Linn (2008) underlines that it would be insufficient to create a strategy without taking into account the organizations' strengths and weaknesses, as well as the opportunities and threats (S.W.O.T. analysis is the acronym). However Allison and Kaye (2005) also refer to an alternative approach to describe the organization's situation in terms of:

- What are the organization's assets – the organization's strengths and core competencies;
- What are the organization's opportunities – trends in the environment that the organization could take advantage of; and
- What are the organization's vulnerabilities – the organization's weaknesses and threats that work against achieving its mission (pp.151).

Nevertheless, many researchers argue that such a S.W.O.T. analysis may itself involve a sufficient structure analysis (i.e. Gunn and Williams, 2007; Dincer et al., 2006), and an examination of the resource base of the organization including the identification of core competences (Dincer et al., 2006). Aldehayyat and Anchor (2008) conducted research using financial, service and industrial companies in their samples. Findings of their research, indicate that the most used techniques was financial analysis, followed by PEST (meaning Political, Economic, Social and Technological) analysis, Porter's 5-forces analysis, and analysis of key (critical) success factors, identified as an analysis of the external environment. There was still a focus on the use of scenario construction. External analysis was considered to be a part of S.W.O.T. analysis. However, typically the organizations' strengths and weaknesses correspond to the internal environment; and the opportunities and threats correspond to the external environment (i.e. James, 1998; Valkanos et al., 2009). J.M.Bryson and Alston (2005) refer to the "threats" that an organization may face as "challenges", using

the acronym S.W.O.C. (strengths, weaknesses, opportunities, and challenges or threats). This kind of analysis may help an organization identify its critical success factors (J.M.Bryson & Alston, 2005). Notwithstanding the above, Aldehayyat and Anchor (2008) indicate further findings showing that, techniques related to the internal analysis such as core capability/competencies analysis, human resource analysis, value chain analysis, portfolio analysis, strategic planning software, experience curve analysis, and organizational culture, were not used but the respondents were aware of their use (the least acknowledgeable techniques were the analysis of organizational culture, followed by core competencies analysis and strategic planning software (Aldehayyat & Anchor, 2008).

Research conducted in a sample representing a variety of industries indicate that the tools that exceed the median measure were the pro forma financial statement, cost-benefit analysis, S.W.O.T. analysis, competitor analysis, portfolio analysis, benchmarking, analysis of critical success factors, gap analysis and product lifecycle analysis (Elbanna, 2007). However, Elbanna (2007) argues that organizations in the sample may use different approaches or methodologies and gain a better understanding of planning tools and of their impact in improving the process of strategy development. Specifically, the traditional financial and logistics model of the internal strategy analysis seems to be insufficient by its own, whereas past strategy indicators are considered to be forecasting the future more accurately. (Papadakis, 2007). Nevertheless, Dervitsiotis (2005) argues that utilizing strategic tools and techniques may result in outstanding performance.

Grant (1991) argues that a resource and capabilities based approach in long-term strategic planning, relies on internal resources and capabilities (which are the primary source of profit) and provide the basic direction of a firm's strategy. J.M. Bryson and Alston (2005) define *competencies* to be "*capabilities*, sets of actions, or strategies at which the organization is particularly good, or the *resources* (broadly conceived) on which it can draw to perform well against its critical success factors". *Core competency* is said to be "the one central to the success of the organization", and *distinctive core competency* to be "not only central to the success of the organization but to help the organization add more public value than alternative providers do" (pp.83). Resources and capabilities refer to the internal strengths of an organization, which enables it to accomplish its mission and create public value (J.M.Bryson & Alston, 2005).

In general, Gunn and Williams (2007) use the term strategic tools and frameworks, meaning "any systematic approach or technique that the strategist has employed to further inform their strategic decision-making" (p. 201). These authors also assert that a

comprehensive understanding of such tools assists in the evaluation of micro-processes during the strategic development of organizations. Their research findings, conducted in several business areas (i.e. public, private and service sector), indicate that three strategic tools are utilized by over 50% of organizations (benchmarking, critical success factor and SWOT analysis by 70% of organizations), followed by tools such as competitor analysis and stakeholder analysis, and tools such as McKinsey 7'S' and Porter's 5-forces analysis are used by less than 15% of organizations. Valkanos et al. (2009) assert that S.W.O.T. analysis is preferred because this technique is easily understandable and well structured for the exploration of new ideas. What is more, S.W.O.T. analysis gives the organization the ability to forecast the future.

Nevertheless, Porter (2008) asserts that understanding the competitive forces, reveals a comprehensive understanding of current profitability while providing a framework for forecasting and influencing competition and profitability over time. Porter's 5-forces are the *threat of new entrants*, the *threat of substitute products or services*, the *bargaining power of suppliers* and *buyers*, as well as the *rivalry among existing competitors* (pp.4).

Furthermore, benchmarking is "the continuous process of identifying, understanding and adapting best practices and processes that will lead to superior performance" and is generally used in order to move forward and manage the changes needed to maximize the benefits (Oakland, 2001, pp.113-114). Papadakis (2007) argues that many businesses tend to assume benchmarking as a way of replicating successful practices of other competitors. This makes businesses reactive, rather than proactive, to an ongoing competitive environment. Several factors may influence the adoption of benchmarking. The findings of Lee, Zailani, and Soh (2006) from research conducted in manufacturing companies in Malaysia revealed that the most influential factor in adopting the benchmarking approach was employee participation, followed by top management commitment and the role of quality in the organization. Moreover, in recent literature another aspect of benchmarking has arisen. Southard and Parente (2007) refer to internal benchmarking as a new method of evaluation processes for improvement, or identifying best practices within the organization, based on the availability of internal knowledge.

Another model prominent in the literature is McKinsey 7'S'. This refers to a framework made to deal with shared values, structure, systems, style, staff (people), skills and strategy (as cited in Papadakis, 2007, pp.613). The organization's success or failure depends on the interaction and cohesion of 7'S', as well as on the amount of attention given by management and on the ability to change in unison (Papadakis, 2007). Rasiel and Friga

(2001) reveal that according to McKinsey's fact-based and hypothesis-driven problem solving, an organization should define the problem, design the analysis, test the hypothesis and develop a process of interaction seeking ongoing improvement. Consequently, McKinsey's framework is much more than a tool used for environmental assessment; rather it is a significant guide for effective strategy implementation.

Gunn and Williams (2007) argue that deployment of strategic tools is necessary, because the cognition of key players may not cope with the complexity of their environments. Vila and Canales (2008) research focusing on the evolution of strategic planning at RACC (Royal Automobile Club of Catalonia, founded as a sport association in 1906), indicates that the shift from a limited environmental analysis to a more comprehensive approach resulted in a strategy conceived as a shared framework. This framework takes into account an ideal strategy based on external issues and feasible strategy based on internal issues. The external analysis included the analysis of market trends concerning the current state and future situation of opportunities and threats; supply analysis based on best practices and benchmarking; demand analysis including segments, needs and expectations; as well as analysis of suppliers. Hence, an ideal strategy was developed, based on opportunities and threats, strategic issues, key success factors and core competencies. The internal analysis included the analyses of strengths and weaknesses in the operating model that take into account processes, structuring, organization, people, technology, financial resources, and alliances. There main focus was on positioning the organization with respect to core competencies and S.W.O.T. analysis, to strategic alternatives, to the assessment of feasible strategies and to the strategic choice.

Vila and Canales (2008) argue that over the last decade strategic planning turned focus towards flexibility through the development of competencies such as strategic thinking based on a more realistic assessment.

Forecasting. Mun (2006) argues that forecasting is the act of predicting the future. However, Fruhling (2006) asserts that a forecast may be uncertain, given the international systems, the transition of technological, tactical and operational means of action, inadequate information, as well as the unexpected behavior of competitors. Adya, Lusk, and Balhadjali (2009) state that most managers do not use a system that embodies existing knowledge and view forecasting as a demanding and complex task.

Recent literature indicates the necessity to forecast the causal relationships, variables and parameters of strategic issues so that efficiency can be achieved with available resources (Fruhling, 2006). The forecasting process should integrate *domain knowledge, historical*

data, causal forces acting upon the domain, and physical characteristics of the process, producing measured realizations that are to be forecast (Adya et al., 2009, p.13). Quantitative or statistical approaches, i.e. statistical probabilities, classical decomposition, econometric model, Monte Carlo simulation (accounting randomness and future uncertainties through different scenarios), are used to forecast when historical data exists; and qualitative techniques, i.e. Delphi technique, market research, management assumptions, polling data, expert opinion approach, are used to forecast when historical data do not exist (Mun, 2006). However, Adya et al. (2009) argue that forecasting must be used as a problem-solving strategy and as a tool to cope with complexity.

Allison and Kaye (2005) state that even though the future may be somewhat predictable, an organization is often required to cope with uncertain environments. Berry (2007) argues that environments do not change in predictable ways. Hence, planning is not about predicting the future, but it is about appreciating multiple choices in order to advance and make better decisions (Allison & Kaye, 2005). Simplification of scenario planning processes, as well as the assessment of different scenario options might be essential (Allison & Kaye, 2005). Chermack and Nimon (2008) argue that scenario planning has an impact on participating decision-making style, promoting system thinking. Their findings indicate that people who tend to rely on rational decision-making (meaning that there is "one right answer") tend to increase the intuitive decision-making style as a result of scenario planning participation. Fruhling (2006) underlines that selecting a strategy which can lead to confronting uncertainty, "will always remain an art more than a science" (p.28). However, Deming (1994) underlines that *rational prediction requires theory that builds knowledge through systemic revision* (pp.102) and that the *use of data requires prediction* (pp.103). Moreover, Deming (1994) identifies knowledge as an interaction of forces, the system's effect and the different sources of uncertainty. "Once a process is not in statistical control, it has not a definable capability, and thus performance is not predictable" (Deming, 1994, pp.99).

Critical success factors. Many organizations have goals without being supported by methods (Oakland, 2001). Oakland (2001) argues that the purpose of any organization is to accomplish its mission. Hence, for each critical success factor, core processes should be identified in order to achieve the organization's purpose of existence. Fryer et al. (2007) assert that the concept of critical success factors was first presented in the private service sector and has been applied to the public sector as well, enabling the continuous improvement.

Critical success factors may be viewed as the most important sub-goals or minimum key factors that an organization must have or needs in order to be sufficient for the mission to be achieved (Oakland, 2001). J.M.Bryson and Alston (2005) state that critical success factors are "things the organization must do or the criteria it must meet in order to be successful in the eyes of its stakeholders, especially those in the external environment" (pp.83). Moreover, critical success factors "should lead to a balanced set of deliverables for the organization" (Oakland, 2001, pp.26-27) in terms of:

- financial and non-financial performance;

- customer/market satisfaction;

- people/internal organization satisfaction; and

- environmental/societal satisfaction.

Chin et al. (2008) based on the related literature and on interviews carried out in the manufacturing sector, identified three major categories of critical success factors, such as management commitment; communication management; and relationship development. Similarly, Fryer et al. (2007) identified several critical success factors, such as management commitment, customer management, employee development and satisfaction, cultural change, clear mission statement, effective use of technology, fast response to change, circles/improvement, strategic quality plan and quality data. However, Fryer et al. (2007) support that not all the critical success factors are relevant to all organizations.

Critical success factors must be linked with measurable and interrelated key performance indicators in order to simplify management thinking (Oakland, 2001). Nevertheless, Oakland (2001) underlines that for a given critical success factor a core process should be identified; moreover, sufficient processes should be classified to accomplish all of the critical success factors. Fryer et al. (2007) maintain that the importance of defining the critical success factors lies on the organizations' need to increase success rate, reduce cost and strive for continuous improvement. Identifying the critical success factors, not only will enable the achievement of organizations' mission and purpose, but also will enable a profound understanding of what the mission and changes require (Oakland, 2001).

Key performance indicators. Key performance indicators can be viewed as the way to translate the organization's mission into clear objectives, simplify management thinking and monitor the progress of achievement as well as evaluating the organization's success (Oakland, 2001). These are indicators that measure the advancement towards the

achievement of certain goals, considering the unique characteristics of an organization (Shahin & Mahbod, 2007).

Shahin and Mahbod (2007) assume that in order to narrow the risk involved in goal-setting, key performance indicators (KPIs) should be viewed as a multi-criteria decision-making problem. Based on the related literature regarding the "Analytical Hierarchy Process" (AHP) and SMART goal setting (Specific; Measurable; Attainable; Realistic; Time-sensitive), they created a novel integrated approach to prioritize key performance indicators. Identifying that the Analytical Hierarchy Process is a model towards a systematic effort of resolving complex problems and that SMART goal setting is the basis of establishing certain criteria, they proposed a five step approach in order to prioritize key performance indicators:

1. Define and list all of the KPIs;
2. Built an AHP hierarchy in which, the goal is to prioritize KPI alternatives with respect to SMART criteria;
3. Understand the pairwise comparison between alternatives (i.e. KPIs);
4. Calculate composite priority: calculate local weights and global weights; and
5. Selection of KPIs that are more relevant to organizational goals. (Shahin & Mahbod, 2007, p.231).

Shahin and Mahbod (2007) assume that the "time-sensitive" criterion might be more important than the "measurable" one, based on the assumption that time is a fundamental factor affecting the competitive advantage of an organization. However, Oakland (2001) argues that key performance indicators should be viewed as being measurable indicators of success in terms of the mission and critical success factors, based on the appropriate data collection.

Continuous Review. All organizations are in a continuous state of change and flexibility (J.M.Bryson & Alston, 2005). Oakland and Tanner (2007) support that leaders need to continually negotiate about all aspects which enable the changes required. Changes are planned for several reasons, for instance to solve problems, to learn from experience, to reframe shared perceptions, to adapt to external environmental changes, to improve performance and in general to influence the future. This may lead an organization to achieve effectiveness and to gain the necessary capabilities in order to perform fundamental changes (Gummings & Worley, 2008). Awareness and consideration about the forthcoming changes in the business environment are required for an organization to adapt rapidly and appropriately (Oakland, 2001). An organization should periodically monitor alterations in the environment and review whether its initial assumptions remain valid (Allison & Kaye, 2005).

It is fundamental that organizations review and re-examine their mission, goals and objectives in the appropriate period of time (Oakland, 2001; J.M.Bryson & Alston, 2005; Poister & Streib, 2005; Kaplan & Norton, 2008; Brinckerhoff, 2009). However, J.M.Bryson and Alston (2005) argue that an organization should re-examine not only the mission statement, but also the shared values, the policies, and the vision statement throughout the implementation process to achieve effectiveness in the future.

Notwithstanding the above, Contrada (2009) argues that in recent years organizations have move forward to the so called "rolling forecasting", meaning monthly updates or quarterly re-forecasting annual results which typically concern objectives and strategies in the operational level. Rolling forecasting may provide a continuous performance outlook and an overall estimate of expected future performance (Contrada, 2009). In relation to the above, Contrada (2009) supports that key decision-makers may conduct a monthly review meeting, in addition to a quarterly strategy review, which may include:

1. A demand plan review to sign off on sales forecast assumptions;

2. A sales and operation planning review to sign off on resource and action plan tradeoffs to reach desired planning period volumes, prices, and margins;

3. A strategic initiative review to check status and rebalance, if necessary;

4. A productivity portfolio review to check status and refocus, as required; and

5. A rolling forecast review to commit to next-period projected results. (p.6).

It may be assumed that organizations will move towards revision, taking into consideration their unique objectives, goals, strategies and products or services offered. Additionally, Oakland (2001) argues that it is essential to review the whole organizational structure including the management's responsibilities and operational procedures. Many organizations have inadequate mechanism for continuous reviewing, and thus management is being reactive rather than proactive (Oakland, 2001).

The "revision" is based on the internal and external environmental analysis conducted by the planners (Kriemadis, 1992; 1997). According this point of view, Allison and Kaye (2005) state that it is essential to get feedback and review the initial assumptions based on the gathered information. Planning committee members have to continually assess whether information gathered is sufficient and accurate, in order to accomplish short and long term priorities.

Long-Term Strategies. After an organization has responded to questions such as, "What business are we in and why?" and "What are the key issues we face in our business?" as well as a) establishing the vision, mission, and values, b) developing the long-term objectives and

goals, c) completing the internal and external organization's analysis and d) identifying the critical success factors which define what an organization need to achieve, an organization needs to determine the best way in which it can compete and achieve its purpose.

The most effective means of achieving an organization's purpose are strategies (Allison & Kaye, 2005). Strategies efficiently fulfill an organization's mission and achieve its issue-specific goals and in general create public value (J.M.Bryson & Alston, 2005). Based on the assessment of the internal and external environment an organization collaborates and competes, as well as taking into account priorities and long-term objectives, an organization develops strategies and is taken into account considering the organization's future direction (Allison & Kaye, 2005).

All parts and stakeholders need to be identified (J.M.Bryson & Alston, 2005) and their interrelated involvement in the development of strategies is examined and enabled (Allison & Kaye, 2005). Plant (2009) indicates that without stakeholder involvement, the risk is higher and strategic initiatives will be poorly implemented. The decision making process requires the participation of all stakeholders, internal and external, in order to create value for the entire organization. Oakland and Tanner (2007) support that decision making may demand fundamental changes. Leaders must be able to deal with risk and this requires greater commitment pervading the organization. A clear strategy may result in overcoming the barriers to change (Kaliannan & Awang, 2008) and thus decisions and choices have to be made towards the appropriate selection of strategies. Vila and Canales (2008) stress the need to understand how strategies relate to the way decisions must be made, and priorities set. Consequently, management should examine the effectiveness of past and present strategies in order to re-examine their part in future decision making (Allison & Kaye, 2005). A review of existing strategies should be conducted to enable the evaluation of potential alternative strategies (Allison & Kaye, 2005; J.M.Bryson & Alston, 2005; Akingbola, 2006).

Harris and Ogbonna (2006) indicate that there are several factors that may impact the development of actions with a long-term perspective, such as firm dynamics, competitors' activities, financial and time resources' availability, as well as the willingness of an organization to enable strategic thinking through training programs. Oakland and Tanner (2007) argue that change may be necessary due to internal factors as well as external pressure. Long-term strategies are significant for an effective strategic planning process, but difficulties may arise and need to be assessed. Allison and Kaye (2005) state that there are great differences between for-profit and non-profit organizations. Specifically, political influence is greater in the non-profit than the for-profit organization. Therefore a positive or

negative political position on long-term perspective will have a direct impact on an organization. The development of a strategy which lasts more or less than an election cycle, as well as the differences in academic background and experience between administrators and elected officials, may be fundamental obstacles to commitment to long-term strategies that will achieve a common purpose (Allison & Kaye, 2005). More specifically Kriemadis, Kotsovos, and Alexopoulos (2009) assert that the most prevailing factor among for-profit and non-profit organizations is related to the achievement of the mission.

J.M.Bryson and Alston (2005) assert that strategies can vary by level, function, and time frame. Long-term strategies do not have a single focus but are developed to achieve an organization's vision and purpose. Harris and Ogbonna (2006) support that firms adopting long-term perspectives are more likely to initiate planning with a more comprehensive and profound understanding and are more likely to respond accurately and rapidly to long-term opportunities and threats. Furthermore, Vila and Canales (2008) underline that effort to achieve common goals and objectives within a long term horizon, rather than a strict set of action plans, enable the organization to realize its desired future uninhibited by its current position. Kaplan and Norton (2008) assert that long-term strategies are viable for about three to five years. However, Kaplan, Norton, and Barrows (2008) argue that every strategy, be it successful or not, ultimately moves forward. Only when there are unsuccessful experiences or when a strategy has run its course, can an organization look forward a new transformational strategy (Kaplan et al., 2008). However, besides reviewing the strategy and the aligned objectives on a regular basis (usually every three years), other aspects may drive an organization towards a new transformational strategy, such as new leadership, technological change and macroeconomic or political effects (Kaplan et al., 2008). Thus the deployment of a "strategy map" framework and the use of the "balance scorecard" may assist in the development of the formulating stage of a new strategy, in guiding the choices and in ensuring the strategy is achievable (Kaplan & Norton, 2008; Kaplan et al., 2008).

Kaplan and Norton (2008b) have formulated an integrated management system that integrates the processes and tools needed for strategy, and enables the monitoring and improvement of the effectiveness of both long-term strategy and operations. This system is comprised of six stages:

1. Develop the strategy using an array of strategy tools such as mission, values, and vision statements; external competitive, economic, and environmental analyses; methodologies, such as Michael Porter's five forces and competitive positioning

framework, the resource-based view of strategy, and blue ocean strategies, as well as scenario planning, dynamic simulations, and war-gaming;

2.   Plan the strategy using such tools as strategy maps and Balanced Scorecards, along with targets and strategic initiatives;

3.   Align the organization with the strategy by cascading strategy maps and Balanced Scorecards to all organizational units, by aligning employees through a formal communications process, and by linking employees' personal objectives and incentives to strategic objectives;

4.   Plan operations using tools such as quality and process management, reengineering, process dashboards, rolling forecasts, activity-based costing, resource capacity planning, and dynamic budgeting;

5.   Monitor and learn about problems, barriers, and challenges. This process integrates information about operations and strategy into a carefully designed structure of management review meetings;

6.   Test and adapt the strategy, using internal operational data and new external environmental and competitive data – thus launching a new cycle of integrated strategy planning and operational execution. (p.3).

Kaplan and Norton (2008b) argue that it is essential to link strategy formulation and planning with operational execution.

It is imperative for an organization to develop the ability to facilitate implementation and develop strategic thinking within the organization.

2.2.2. *Strategy Implementation.* After the selection and development of long-term strategies has been completed, the establishment of both mid-range and short-range objectives and strategies that support long-term objectives and strategies follows, ensuring that all the objectives and strategies respond effectively to the strategic issues (i.e. J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Wilson & Gilligan, 2005; Dincer et al., 2006; Kaplan & Norton, 2008; Plant, 2009).

Allison and Kaye (2005) indicate that each financial, administrative, and governance function should have its own goal statement translated to specific objectives. Furthermore, J.M.Bryson and Alston (2005) underline that for each priority concerning programs, services, and projects, specific action must be taken, and thus short-term strategies need to be implemented. Nevertheless, J.M.Bryson and Alston (2005) argue that for an effective implementation process, adequate funding and other resources are required to create value for

the organization and its stakeholders. Furthermore, short-term projections need to be developed and aligned with the long-term strategies (Allison & Kaye, 2005). Kaplan and Norton (2007) underline that when establishing short-term goals, the related changes in performance must be forecast. This, aligned with the associated changes in each specific goal, may benefit the organization.

Goals typically include staffing and benefits, resource development, executive management, planning and evaluation, public relations/marketing, infrastructure (including technology, finance, information reporting and facilities) as well as networking and collaboration (Allison & Kaye, 2005). Specific actions and short-term objectives and strategies should be developed to accomplish goals related to each operating and functional area of an organization (Allsion & Kaye, 2005; Kaplan & Norton, 2008). However, it is imperative to visualize strategies as a chain of cause-and-effect relationships among the strategic objectives (Kaplan & Norton, 2008). Hence, Kaplan & Norton (2008) propose that any organization should use the *strategy map*, which will allow for objectives to be balanced and placed into three to five *strategic themes* which consist of distinctive sets of related strategic objectives. This will help organizations to maintain the integration of the objectives into the overall strategy, as well as to manage short, intermediate and long-term value created processes (Kaplan & Norton, 2008).

Short-term objectives are usually related to annual operational plans (Allison & Kaye, 2005) and last as long as twelve to eighteen months (Kaplan & Norton, 2008). Slack et al. (2009) state that functional strategies may be influenced by daily experiences; however it is fundamental that they promote the organization's overall strategy. Contrada (2009) identifies the *core management processes* that comprise the *operating strategy system* as "sales and operations planning", "corporate portfolio and initiative management" and "driver-based planning and rolling forecasting" (p.3). According to Contrada (2009) sales and operations planning is "the process of defining what will be sold (the demand) and what resources will be required to produce the products or services (the supply)" (p.3); corporate portfolio and initiative management is "the process of managing discretionary spending and investment above and beyond the spending needed to deliver the current-period sales and production plan targets"; driver-based planning is "an approach to financial planning that replaces the traditional budgeting process" in order to estimate financial results (p.5); and rolling forecast is the process that "provides a continuous performance outlook" to predict the annual results (p.6). Contrada (2009) also states that decisions related to the operational strategies are significantly influenced by the organization's strategic priorities. In addition to the above,

Slack et al. (2009) state that operational strategy is the unification of decision-making and performance objectives. When an organization makes decisions on actions related to operations, marketing, finance, product/service development, human resources, and other functions, it should take into account not only the long-term vision and objectives but also its own capabilities (Slack et al., 2009). Consequently, operational plans outline actions that will accomplish long-term objectives (Norton & Kaplan, 2008).

Notwithstanding the above, Plant (2009) argues that successful implementation of a strategic planning process depends on the structure of an organization and on the organization's ability to monitor its progress towards achieving its goals. To ensure that a strategic plan may effectively be implemented, Plant (2009) based on previous research (Plant, 2008a), proposes that (p.40):

- Strategic planning should set organizational goals and unit level and program objectives;
- Design of organizational structures and process should facilitate the attainment of goals and objectives;
- Organizational communication and decision-making processes facilitate joint problem solving and action;
- Reward systems provide incentives to strive for success;
- Technology and resources should be adequate to support expected performance;
- The budget process and arrangements are necessary for accountability;
- Support for skill development and learning is needed; and
- Mechanisms facilitate ongoing communication among administrative staff, elected officials, and citizens.

Hence, Plant (2009) argues that the strategic planning process should be part of a strategic management system. Earle (2009) goes further, identifying that "strategic management is a management philosophy that uses the strategic planning process and the resulting strategic plan as its foundation. Strategic management brings the strategic plan to life and incorporates the plan in decision-making, control, and evaluation." (p.9).

On the other hand, Poister and Streib (2005) argue that it is more important for strategic planning to be action-oriented. The organization derives benefits only when strategic planning process is implemented. Recent research focuses on the elements of strategic planning, as well as the analysis of the most appropriate techniques and frameworks in order for strategies to be effectively implemented. Poister and Streib (2005), based on their findings

of a research study conducted in municipal governments, indicate that among the cities engaged in strategic planning, a high rate reported that long-term direction was adopted, priorities were determined, a decision making process was enforced; and performance management, measurement practices and specific budgeting were utilized.

Financial management is usually concerned with financial objectives which are short-term and aims to limit low effectiveness (Gong, 2008). Kaplan & Norton (2007) claim that in many organizations separate resource-allocation and budgeting processes, set financial targets for the next fiscal year, that have not been integrated into the goals in strategic plan Kaplan and Norton (2007) argue that by using the balance scorecard as an integrated strategic management system, companies may *clarify and update strategy, communicate strategy throughout the company, align unit and individual goals with the strategy, link strategic objectives to long-term targets and annual budgets, identify and align strategic initiatives and conduct periodic performance reviews to learn about and improve strategy* (p.13). The contribution of balance scorecard is achieving financial results, adding value to the costumers and developing peoples' capabilities, meaning learning and growth (Kaplan & Norton, 2007; Papadakis, 2007). Kaplan and Norton (2007) underline that without a balance scorecard most organizations may not: a) achieve the consistency between a shared vision and planed actions as they seek to change direction, b) develop new strategies and processes, c) ensure that the financial objectives and budgeting will support the overall strategic goals, d) enable organizations to align its management processes and e) focus on implementing long-term strategy.

Through the translation of vision, mission and value statements, new strategies and necessary initiatives may be enhanced (Kaplan & Norton, 2008). What is more, Kaplan and Norton (2007) argue that the balance scorecard, as a management system, may enable the management to assess the progress of the organization's strategy and specify cause-and-effect relationships throughout the strategy implementation process.

2.2.3. *Strategy Evaluation.* Following the formulation and implementation of the strategic planning process, the final stage is the evaluation of an organizations' strategy and strategic planning process (i.e. Oakland, 2001; J.M.Bryson & Alston, 2005; Tapinos et al., 2005; Poister & Streib, 2005; Dincer et al., 2006; Slater et al., 2006; Acur & Englyst, 2006; Nadkarni & Narayanan, 2007; Papadakis, 2007; Norton & Kaplan, 2008).

J.M. Bryson and Alston (2005) assert that this final step reassesses strategies and strategic issues (i.e. mission, structure, processes, management) in order to decide on their

effectiveness. Allison and Kaye (2005) indicate that a strategic plan should be assessed in order to examine whether it accomplishes the following:

- Provides guidance to both short-term and long-term priorities;

- Helps the organization to allocate resources;

- Is understandable by people who have not participated in the development of the plan;

- Is responsive to the organization's best understanding of its internal and external environment;

- Is the product of a consensus and commitment-building process ;

- Has been formally adopted by the board of directors; and

- The annual operational plans meet these measures of success: developed by staff which are responsible for the implementation of the goals and objectives; provides an easy implementation, monitoring, and reference tool; operationalizes the strategic plan; and be realistic (pp.299-300).

Allison and Kaye (2005) argue that strategic planning is a dynamic process; therefore it should be monitored at least once a year, in order to ensure the fulfillment of goals and objectives. Kaplan and Norton (2008) state that it is imperative to test the strategy, in order to assess whether the improvements are sufficient or amendments are needed. Specifically, Kaplan and Norton (2008) stress the importance of examining the current financial status, by analyzing cost and profitability reports concerning each product line, costumer, market segment, channel, and region. Furthermore, Kaplan and Norton (2008) state that statistical analyses of correlations among the strategy's performance measures are necessary so that decisions can be made on whether previous strategy development is adequate or new strategies are required. Plant (2009) determines that establishing performance measures followed by "high-level" indicators, may estimate the extent to which an organization has achieved its vision and goals.

Oakland (2001) identifies several factors that need to be considered for a successful performance measurement system:

- the level of top management support for non-financial performance measures;

- the identification of the vital few measures;

- the involvement of all individuals in the development of performance measurement;

- the clear communication of strategic objectives;

- the inclusion of customers and suppliers in the measurement process; and

- the identification of the key drivers of performance (pp.249).

Furthermore, Gomes, Yasin, and Lisboa (2007) assuming that customers are an internal part of the operational service system, highlight that service availability, quality, and efficiency may be used as measurement indicators. This approach may result in the measurement and improvement of performance while both specific and aggregate measures are taken into account (Gomes et al., 2007). However, Hatry (2006) emphasizes the need to assess the performance measurement systems, and therefore proposes a five step process in which the first three steps are preconditions before examining the accuracy and usefulness of the performance measurement system which follows:

1. Assess the extent of agreement on goals and strategies for achieving them;

2. Clarify how each goal is to be achieved. Use logic models to identify relevant inputs, activities, processes, outputs, intermediate outcomes, intended results, important unintended outcomes, assumed causal links, and key external factors that could significantly affect achievement of the goals;

3. Identify the performance indicators (meaning specific numerical measurement for each aspect of performance, such as inputs, outputs, outcomes, efficiency, productivity e.t.c.), and data collection procedures in use in the agency or program;

4. Assess the technical quality of the performance measurement systems; and

5. Assess how widely the performance information is used in systems for managing the agency or program in order to achieve performance goals, in accountability to key stakeholders and the public, in demonstrating effective or improved performance, and in resource allocation or other policy decision-making. (pp.282).

Hatry (2006) identifies several criteria aligned with the fourth step, such as "a reasonable level of agreement exists on goals and strategies", "the performance measurement system is of sufficient technical quality to assess and report on performance in terms of agreed-on goals" and "the performance information presented is clear, understandable, and meaningful" (pp.269). Additionally, criteria aligned with the fifth step examine if the performance information is being used. These criteria may be "performance information which is used to manage the agency or program to achieve performance goals", "a reasonable degree of accountability is provided", "performance has improved or become more effective" and "performance information supports resource allocation or other public decision making" (Hatry, 2006, pp.269).

Notwithstanding the above, several variables can be utilized to evaluate a strategic planning process, which may ascertain whether, the strategic planning process:

- supports the achievement of the organization's goals;

- is efficient;

- is effective;

- leads to the adoption of successful strategies; and

- is considered a successful process. (Tapinos et al., 2005, p.374).

Recent literature highlights the use of the balance scorecard as an evaluation method also. Kaplan and Norton (2007) identify important measures (e.g. customer satisfaction) that may be linked to the four perspectives of the balance scorecard, which underlies that changes in one component of the system consolidate previous changes elsewhere. Such a high correlation may support an organization's strategy or help the organization to identify evidence of an unsuccessful strategy (Kaplan and Norton, 2007).
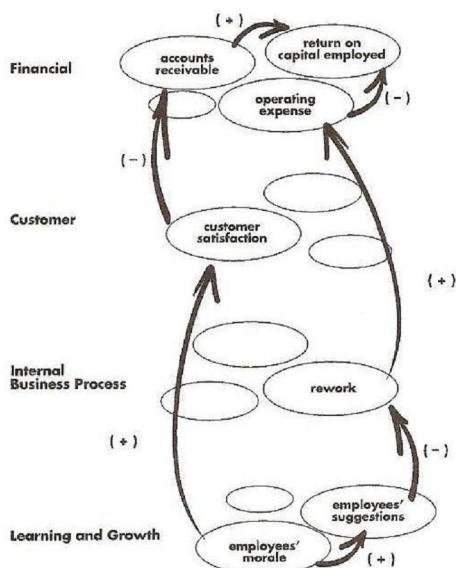
Figure 1. How One Company Linked Measures form the Four Perspectives

Source (Kaplan & Norton, 2007, p.12).

Moreover, Kaplan and Norton (2007) identify the balance scorecard as a system that provides feedback and learning and helps to define specific metrics in order to fulfill organization's vision. Moreover, Kaplan and Norton (2007) stress the need to establish a system of individual performance measurement (personal scorecards) taking into account the organization's strategic objectives and measures. According to the above, Yang and Yeh (2009) assert that the balance scorecard may be viewed as a framework of strategic measurement and management system, through the translation of an organization's vision and strategy into an inclusive set of performance measures. However, Kaplan and Norton (2007) argue that the balance scorecard is more than a measurement system. Kaplan and Norton

(2007) assert that "it is a top-down reflection of the company's mission and strategy; it is forward looking; it integrates internal and external measures; and it helps a company focus" (p.14). Performance needs to be measured in order to ensure the success of the strategy undertaken and to maintain quality, as well as securing the achievement of the desired objectives (Yang & Yeh, 2009).

Oakland (2001) argues that traditional performance measures and indicators which are based on cost-accounting information may not be able to identify opportunities and examine the outputs of an organization's internal and external environment and their interaction. Moreover, an organization may not be able to advance further in order to achieve organizational goals. Oakland (2001) acknowledging the value of Deming's PDCA cycle, meaning Plan (*establish performance objectives and standards*), Do (*measure actual performance*), Check (*compare actual performance with the objectives and standards*), Act (*take the necessary actions to close the gaps and make the necessary improvements*), proposes a measurement framework in order to enable the organization's estimation of actual performance in relation to the objectives and standards (pp.247-248). This framework may provide the basis for understanding the customers' requirements and helping the people of the organization to comprehend all the aspects of the performance measurement process. Specifically, Oakland (2001) proposes a framework that consists of four levels:

1. Strategy development and goal deployment leading to mission/vision, critical success factors and key performance indicators;
2. Process management and process performance measurement (including input, in-process and output measures, management of internal and external costumer – supplier relationship and the use of management control systems);
3. Individual performance management and performance appraisal; and
4. Review performance (including internal and external benchmarking, self-assessment against quality award criteria and quality costing). (pp.250).

The evaluation of a strategic planning process may be inadequate by itself. A culture for ongoing improvement should be appreciated towards effectiveness and quality (Oakland, 2001).

2.3. *Benefits of the strategic planning*

A strategic plan is both "an *end* and a *mean* for organizational change and should not be relegated to merely symbolic value or managerial failure" (Harris, Dopson, & Fitzpatrick,

2009, p.425). The core problem of strategic planning is the inadequacy to realize its "multi-faceted" character and the need to interrelate different aspects of the strategic planning development (Vila & Canales, 2008).

Strategic planning is a "way of knowing" (Bryson et al., 2009) that provides a systematic process to obtain information about the organization's "big picture" (Poister & Streib, 2005). It creates a "forum of discussion" (Allison & Kaye, 2005) and enables integration in an organization (Jarzabkowski & Balogun, 2009). Furthermore, it creates progressive thinking (Poister & Streib, 2005) and "challenges the mind" (Lake, 2004) in order to create effective strategies (Gunn & Williams, 2007). All these above may lead an organization to effectively respond to emerging situations (Kriemadis, 1997). Similarly, J.M. Bryson (2004) states that strategic planning may develop strategic thinking, improve decision making, benefit the people involved and moreover, enhance organizational and societal effectiveness. Furthermore, it may enable choices that may shape economic success and, therefore, reposition an organization to a higher level (Gavetti et al., 2005).

As already mentioned before, formal strategic planning may provide definite results and enables the integration of systems required for the smooth operation of an organization (Mintzberg, 2000). It may also constitute a significant comparative advantage and provide the means that an organization needs to overcome uncertain and turbulent environments (O'Regan & Ghobadian, 2007). A strategic planning that enables flexibility may result in superior performance (Porter, 2008). It may increase organization's effectiveness and efficiency. In this way performance is enhanced, real public value is created and better results are achieved consuming fewer resources (J.M.Bryson & Alston, 2005). Through strategic planning, success factors for managing the change may be identified and future initiatives may be supported sufficiently (Oakland & Tanner, 2007). Oakland (2001) states that in order to surpass barriers and to be able to formulate and implement a strategic planning process towards change and excellence, an organization should acknowledge the value of education, communication, participation, involvement, facilitation, and support.

Consequently, it can be asserted that strategic planning is a systematic process, which enables communication, participation, involvement and integration. It may result in superior performance through commitment to learning and growth, continuous improvement, cultural change and excellence. It challenges strategic thinking, initiative, innovation, creativity and flexibility through a data-based and detailed analysis of the internal, external and in general, of the competitive and dynamic environment in which an organization collaborates and competes. It clarifies desirable and realistic long-term direction translated into a shared

vision. It establishes long-term objectives and strategies linked with mid- and short-term objectives and strategies in order to fulfill the organization's mission and purpose. It may create added-value to all shareholders and stakeholders, through an ongoing effort towards effectiveness, efficiency and excellence.

2.4. *Strategic Planning in Higher Education*

Higher education institutions may constitute a fundamental factor of economic, social, and cultural development for countries allover the world (Taylor & Machado, 2006). Moreover, they are unique and complex environments, which may change over time in order to meet demands of both the organization's internal and external environment (Martinez, 2007). Institutions in higher education attract the interest of both public and private investments and are supposed to satisfy social expectations (Taylor & Machado, 2006). Universities "are caught between two worlds of *academe* and *business*" (Drew, 2006, p.118).

Dooris et al. (2004), based on the related literature, reveal that during the decade of 1980 several changes where observed regarding the concept of strategic planning in higher education (e.g. *identifying and prioritizing key stakeholders, environmental scanning, situational analysis, specification of core competencies and distinctive competencies, strategy formulation, goal setting, objective setting, evaluative feedback*). Institutional leaders considered strategic planning as "a rational tool for orderly, systematic advancement of the academic enterprise", which may result in "organizational effectiveness" (p.7). Many colleges and universities have already adopted systems form the business sector, seeking to achieve sustainability and efficiency (Martinez, 2007). Nguyen and Frazee (2009) assert that higher education institutions are engaged in a strategic planning process towards future needs, growth and sometimes reduction of management expenditure or downsizing.

Current challenges including "changing demographics, reduced per capita funding, increased scrutiny from the public, and internationalization" (Taylor & Machado, 2006, p.154) stress the need for change. Taylor and Machado (2006) identify additional challenges, such as *mixed profile in the student population*, the *emergence of new post-secondary institutions*, *new competitors*, the *invasion of market forces in higher education*, the *global knowledge economy*, a *technology-driven society*, *turbulent environments*, and *E-colleges* (p.154), to mention some. This point of view emphasizes that institutions have to be equipped for new challenges and changes that the academic world has never faced before. Furthermore, Srikanthan and Dalrymple (2007) assert that the recent challenges higher education

institutions are facing stem from political leaders' demands to achieve a higher global percentage of the student population in order to respond efficiently to critical economic situations. Dooris et al. (2004) assert that higher education institutions adopt the same mission and initiate planning efforts to achieve the same objectives, such as "hiring better faculty, recruiting stronger students, upgrading facilities, strengthening academic programs and student services, and acquiring the resources needed to accomplish these things" (p.6). However, traditional planning efforts are not sufficient as a whole (Earle, 2009) and thus quality-oriented strategies need to be incorporated in universities (Mashhadi, Mohajeri, & Nayeri, 2007).

Drew (2006) identifies some key questions that may help *contemporary universities* and *knowledge organizations* to be better prepared in an ongoing changing environment:

- Are systems and processes strategically aligned with the organization's vision and objectives, and are those processes streamlined and effective for people in performing their roles?

- Is the organization "listening" to its stakeholders and key audiences or clients? Is it feedback – oriented, investing in productive partnerships internally and externally?

- Is the university preparing itself for leadership readiness with succession planning and is it systematically developing leadership talent in keeping with increased role complexity for contemporary academic leaders? and

- Is the university complementing its scholarship with accountable, ethical governance? Is there means in place of assessing the degree of alignment between that which is "espoused" and "practiced" in terms of desired organizational culture, values and goals? (p.124).

Ongoing and radical environmental changes and demands highlight the need to develop management capabilities, innovative strategies and competitive advantage within the field of higher education (Taylor & Machado, 2006). However, Watt, Higerd, and Valick (2007) argue that in order to decide about the appropriate transformations, an ongoing assessment of strategic planning implementation must take place and various factors affecting the planning process should be taken into account. Watt et al. (2007) suggest that the change process should be adapted into the "unique" culture of higher education by the academic institution. In addition institutions should forecast planning alternatives and acknowledge the value of innovation in order to attain long-term success.

Kim (2007) states that organizational culture is an essential part of strategic planning implementation in higher education institutions. It mainly depends on leaders' beliefs which may affect the general values that govern the entire organization. T.S.Williams (2009) indicates that knowledge and skills may add value to the institutions and ensure sustainable success. In addition, the institution leaders' perception of planning as an open and inclusive process that empowers sharing ideas and involves all stakeholders (i.e. formal or non-formal committees) may provide great benefits as well. The role of an institution leader is a) to further advance a powerful vision and communicate it to the organization's members, b) to establish a mission taking into account people's development and commitment to social justice, c) to adopt a shared philosophy and d) to seek resources and the power required to implement a strategic planning process. It seems that the role of the leader is the key to the development of future programs in an accurate and acceptable way (Kim, 2007). Moreover, Earle (2009) argues that the transformation from the traditional strategic planning process to a more comprehensive, team-based, and long-term oriented one, may improve the effectiveness of higher education institutions.

A mission statement outlines an institution's direction. The strategic planning process helps the institutions to follow that direction and goal-setting connects the institution's mission to strategic planning (Earle, 2009). More specifically, a clearly defined mission statement seems to be crucial for academic institutions. Green et al. (2005) conducted research in which improvements of academic institutions' mission statements were applied, in terms of both "completeness" and "quality" and concluded that performance is enhanced by improving organizational focus.

From another point of view, the major purpose of academic institutions, as opposed to other organizations, is to provide students with knowledge and learning skills in order to enhance creativity and decision making capacity (Wu, 2009). Similarly, Barr and Schuetz (2008) assert that in recent years great attention has been paid to the implementation of multiple student programs, in order to acquire both personal and academic development. However, Earle (2009) argues that although many universities focus on the efficient use of resources, they merely concentrate on the development of effective academic programs. Srikanthan and Dalrymple (2007) identify two distinctive types of process in higher education: a) teaching and learning and b) services offered to students. Specifically, Wu (2009) states that cultural and artistic activities are regarded as services. In addition, Wu (2009) conducted research in higher education institutions in Taiwan and found that cultural and artistic activities had a positive impact on the willingness of students to participate. Stehl,

Reisinger, and Kalatschan (2007) emphasize that in recent years, the perception of higher education institutions has shifted towards providing programs enhancing physical health. Hence, another crucial aspect is the means that every institution has in order to offer services to the students. Facilities are the major means of providing services needed. However, available financial resources required to build or renovate university facilities have become extremely constrained (Watt et al., 2007). Therefore, the strategic planning process must become a high priority for the administration, in order to both promote and provide financial support. Universities' operation depends on the management's perception about the benefits arising from the implementation of a strategic plan. Effective strategic planning in higher education institutions relies on a wide support base as well as active participation by key players of the institution, such as the faculty and administrators (Welsh et al., 2006). However, Welsh et al. (2006) claim that university administrators are usually more in favor of strategic planning activities, than faculty. Welsh's et al. (2006) findings indicate *three variables essential to faculty and administrative support for strategic planning activities which are a) the depth of implementation of strategic planning outcomes, b) the type of institutional decision making and c) the level of support for state reform efforts* (p.701). Based on these findings, it may be assumed that the extent of both using a strategic planning process and structured decision-making process may be affected by institutional management and the personnel's knowledge and willingness towards systematic planning efforts and transformation.

Stehl et al. (2007) highlight that the need for personnel development has significantly increased, especially due to the following factors:

- the emergence of a new philosophy of resource responsibilities and resource allocation and use;
- the development of new strategies;
- the creation of a new management culture to establish strategic success factors: orientation towards generating specific benefits for identified target groups;
- relationship management between higher education institutions and state and appropriate negotiation philosophy; and
- the development of respective training programmes on higher education institution level, but also on ministerial level. (p.18).

Several differences arise among countries concerning the type of institutions, the model of governance, and the funding systems. Lepori, Benninghoff, Jongbloed, Salermo, and

Slipersaeter (2005), indicate the differences are related to the types of higher education institutions (e.g. universities, colleges of Higher Education, Grand Ecoles, vocational schools, business schools e.t.c.), to the governance model (i.e. private, public or state) and to the accounting and funding systems where revenue comes from different sources (e.g. government appropriation, tuition fees, grants and contracts, private funds, part of which may be from research activities, and continuing education, supplementary activities, funding of investments or mixed funding systems). Findings by Lepori et al. (2005) of a study conducted in eleven European countries, indicate among others, that in most higher education institutions (excluding institutions in the U.K.), the share of government appropriations as a percentage of total revenues range between 60% and 80%. Lepori et al. (2005) found that the general state appropriations account for about 2/3 of the total revenues, while the remaining part comes from other sources, and largely from public grants and contracts. Nevertheless, Lepori et al. (2005) argue that, although it was impossible to define revenues from private sources in some countries, there were some indications that a greater part of private revenues came from continuous education rather than from research activities. Zumeta (2008) assumes that both government policymakers and business leaders are already aware of the major implications of higher education institutions in both economic and social welfare and prosperity. As long as higher education institutions improve efficiency and provide accountability for outcomes increased investments will be forthcoming (Zumeta, 2008). Another study conducted by De Fanelli (2008) concerning funding systems in the higher education sector of Latin American countries, reveals that although in most countries the main financial resource of public academic institutions comes from the government, tuition fees (especially in postgraduate programs) have been gaining ground. More and more different sources of private funding are being used by universities of Latin America (De Fanelli, 2008). Although there are many structural and funding differences in the tertiary sector of several Latin American countries, revenues may come from the government, tuition fees, as well as from private revenues, such as income from consulting, technical assistance, technology transfer activities, donations or professional training programs (De Fanelli, 2008). It also argued that higher education institutions face great constraints in developing their own strategic plan, because of their dependence on government decisions related to the distribution of the funds (De Fanelli, 2008). Macroeconomic indicators, in addition to possible political pressure, may restrain the development of long-term institutional policies and decision making. It is for this reason that both the government and higher education institutions should clearly define objectives. The future of higher education institution

requires the mutual development of strategy and structure and commitment by the government for the appropriate distribution of funds (De Fanelli, 2008).

Barr and Schuetz (2008) argue that funding per student remains the lowest in higher education. For example, McGill, Rundle-Thiele, and Lye (2009) assert that the decreased government funding has exerted great financial pressure on Australian universities. Funding systems may greatly influence higher education institution's policies and strategies (Stehl et al., 2007). Given that the higher education institutions operate in a complex environment, it is necessary to develop and establish strategic planning. Establishing a strategic planning process in higher education institutions may be a particular challenge, because of the limited autonomy (i.e. shared governance, statutory and fiscal constraints). Hence higher education institutions need to clearly define their structure and establish systems to enable open communication in the decision-making process, as well as to monitor and control the implementation of the strategic plan (Earle, 2009). Martinez (2007) underlines that initiating a strategic planning process may enable the classification of requirements and thus improve responses to continual changes. However, a strategic planning process may differ in terms of development and implementation (Martinez, 2007). For example, Mazzarol and Soutar (2008) assert that in recent years many education institutions have adopted business practices and developed more competitive and market-oriented strategies, in order to reinforce their positioning. However it was found that many educational institutions used marketing internationally without utilizing formal strategic development. However, the analysis of Mazzarol and Soutar (2008) research which was conducted in Australian educational service institutions, indicate that institutions which did not develop a coherent strategy, did not perform well. Specifically, the failure to develop a clear and coherent competitive strategy may have a negative impact on the long-term sustainability of the institutions (Mazzarol & Soutar, 2008). Accordingly, Martinez (2007) states that the use of a strategic planning process in higher education will provide administrators with a defined and understandable direction for implementing change.

Several higher education institutions have established elements of strategic planning without engaging in a formal and structured planning process (Neefe, 2009). Neefe (2009) conducted a study of sixteen technical colleges in Wisconsin, and the findings indicate that although colleges had established elements of strategic planning that may lead to success, the elements were not part of a structured process aligned with strategic planning or leadership development processes. Neefe (2009) outlines that a structured strategic planning process aligned with success factors, will lead to the achievement of the strategic goals. However,

Earle (2009) asserts that many colleges and universities are operational driven. Earle (2009) argues that a long-term perspective would help institutions to foresee the opportunities and the threats emerging from their dynamic environment. Dyson et al. (2007) recognize the case of the University of Warwick as an illustrative paradigm for the implications of an organization's strategic development. According to Dyson et al. (2007), the University of Warwick a) set a general strategic direction which included a mission statement and specific strategic objectives, b) created strategic initiatives through workshops occurring at both corporate and departmental level, c) developed a five year financial planning model to assess the financial feasibility and viability of applications, d) assessed non-financial aspects, e) aligned the financial plan periodically with strategy adjustments, f) forecast and considered "risk-adverse" approaches, g) and continuously reviewed performance.

However, Gregory (2008) argues that although strategic development has been already established in universities, the transformation from *collegiality* to *managerialism* is a recent trend. Additionally, it is not fully understood that strategic planning processes may be developed to fulfill the objectives set to accomplish strategies on different levels (Gregory, 2008). Taylor and Machado (2006) define several obstacles towards successful implementation of a strategic planning process: a) "engaging in planning for the wrong reason", b) "creating bureaucratic, rigid and cumbersome data-intensive process" and c) "excluding some of the relevant people who should participate in the process" (p.148). Specifically, Taylor and Machado (2006) highlight the following:

- the collegial system needs to support accountability and institutional responsibility;
- it is necessary that higher education institutions adopt general management principles to commit to continuous improvement;
- higher education enterprise must develop a far more adaptive, proactive, and flexible approach to strategic management;
- increasing organizational complexity will continue to demand higher levels of individual and institutional performance;
- in order to respond to high demands the institutions need to rethink the organizational structure and institutional management mode within which they are operating;
- it is necessary that the leadership delegate more responsibilities and empower more individuals; and
- it is the time for formal professional development experiences to be created that will prepare aspiring leaders for the challenges they will face . (p.155-156).

Ruben (2007) stresses that higher education institutions should periodically evaluate their outcomes taking into account specific criteria. Some of the aspects Ruben (2007) considers as appropriate for higher education institutions are: a) *outcomes measurement*, b) *fact-based evaluation of classroom learning*, c) *institutional effectiveness* and *efficiency*, d) *transparency and standardization of evaluative criteria and processes*, e) *measurement of value-added*, *external regulation, accountability*, and f) fundamental *change in the avowed purposes of higher education*. Moreover, barriers (i.e. *underlying motives, hidden agendas, and potential increase in national regulation*) should be identified in order that more beneficial strategies could be chosen (p.62).

The core value that underlies the higher education institutions is to incorporate quality in their planning procedures (Mashhadi et al., 2007; Ruben, 2007). Systems and planning processes already applied in the business sector have been utilized in the higher education institutions as well. Srikanthan & Dalrymple (2007) argue that quality systems and quality assessment procedures have originated from national governments all over the world, enabling them to become more accountable and efficient. Srikanthan and Dalrymple (2007) mention that cycles of quality improvement in higher education institutions should involve innovation and enhance transformational change. It seems that emphasis should be given on certain aspects of planning in higher education institutions as they constitute a more complex environment. Nevertheless, Tari (2008) claims that the same models of planning, and in particular, self-assessment and evaluation procedures may be applied in both for-profit and non-profit institutions, despite the differences arising (i.e. employee participation, quality systems, strategic planning that generates a culture of continuous improvement),

Strategic planning "allows community colleges to identify potential risks, measure uncertainty, and determine a future course of action" (T.S.Williams, 2009,p.3).

2.5. *Strategic Planning in University Sports*

"The strategic planning process model may help athletic departments to think strategically, clarify future direction, deal effectively with rapidly changing environments, and anticipate and initiate change" (Kriemadis, 1997, p.244).

Sport industry as well as its affiliated industries, i.e. sports tourism (Vrondou, Kriemadis, & Kartakoullis, 2009), intercollegiate and university sports (Kriemadis, 1997; Krotee & Bucher, 2007; Barr, 2009; Earle, 2009), involve the establishment of techniques

and strategies present in the greater part of contemporary business, government, and non-profit organizations (Hoye, Smith, Nicholson, Stewart, & Westerbeek, 2009).

The status of sports organizations may vary according to the services offered and their financial resources (Stewart, 2007). Stewart (2007) identifies four separate sectors in which sports organizations can be classified, such as *non-profit public sector, which is driven by the state; the profit-based commercial sector, which is driven by the market; the informal sector, which is driven by civil society; and the voluntary sector, which is driven by aspects of all three social orders, meaning the state, market, and civil society orders* (pp.5). However, Hoye et al. (2009) identifies the a) "state or public sector" (including national, state/provincial, regional and local governments, and specialist agencies that develop sport policy, provide funding to other sectors and support specialist roles), b) "non-profit or voluntary sector" (including community-based clubs, governing associations and international sport organizations that provide competition and participation opportunities, regulate and manage sporting codes and organize major championship events) and c) "professional or commercial sport organizations" (including professional leagues and their member teams, sporting apparel and equipment manufacturers, media companies, major stadium operators and event managers) (pp.7-8).

Intercollegiate and university sports, typically constitute the athletic departments of higher education institutions. University sports organizations that enable participation and competition in national, regional, interregional, and international level, establish the status and regulations and support the alignment of all the athletic departments of higher education institutions, are the respective institutional bodies of each country (www.fisu.net). Just as governmental and non-profit organizations have engaged in strategic planning, higher education and their athletic departments have initiated strategic planning or some planning activities towards a more comprehensive effort to achieve their goals and objectives (Earle, 2009).

Krotee and Bucher (2007) argue that many junior colleges, colleges, universities, and institutions, emphasize aspects such as "developing excellence in sports competition, providing a program that is financially self-sufficient, establishing a leadership position in sports among peer institutions, satisfying needs of the spectators, athletes-alumni, community, and coaches and providing sports programs for the gifted student-athletes" (pp.41). Wickstrom (2006) argues that in order to avoid reducing programs, universities' athletic departments need to "obtain additional resources from the institution", "increase operating revenue", "increase fund-raising" and/or "cut expenses" (p.6).Athletic departments

are accountable not only for managing financial issues, but also for governing all their operations (Wickstrom, 2006). These aspects reinforce the assumption that sports organizations need to adopt several management techniques and clearly understand the "unique features" of sports. Several differences may be present in the sports sector:

- people develop irrational passions (i.e. performance outcomes in competitions or athletes);

- differences in judging performance;

- the interdependent nature of relationship between sporting organizations;

- anti-competitive behavior;

- sport product (a game or contest) is of variable quality;

- it enjoys a high degree of product or brand loyalty;

- it engenders vicarious identification;

- sport fans exhibit a high degree of optimism;

- sport organizations are relatively reluctant to adopt new technology; and

- sport often has a limited supply. (Hoye et al., 2009, pp.12).

Never before have sports organizations faced such a competitive environment, therefore changes and integrated efforts towards effectiveness and efficiency are more critical than ever (Davakos, 2006). Hoye et al. (2009) assert that in order to link strategy and planning, several unique aspects must be considered, such as organizational structure, human resources management, leadership, organizational culture, financial management, marketing, governance and performance management. Strategic planning may shape the future through the development of systematic processes in order to fulfill the selected strategies. Furthermore, an appropriate structure may "involve balancing the need to formalize procedures while fostering innovation and creativity and ensuring adequate control of employees and volunteer activities without unduly affecting people's motivation and attitudes to work" (Hoye et al., 2009, pp.9). Krotee and Bucher (2007) argue that the structure of a college or university athletics department typically depends on "institutional enrollment, tradition, budget, and funding sources" (p.54). Krotte and Bucher (2007) also assert that the basic purpose of an organizations' structure is to effectively accomplish its objectives, through integration, communication, and the delegation of responsibilities. The complex environment of sports requires a better understanding of the roles and functions, as well as taking into account governance capabilities. This may result in an improved performance, consistency, policy, and operations (Ferkings, Shilbury, & McDonald, 2005). Hoye and

Cuskelly (2007) assert that contemporary non-profit sport organizations "operate in a sport policy environment where traditional values of sport (i.e. amateurism, volunteering, and community involvement) are promoted. However, at the same time, they are encouraged to become "financially self-sufficient in order to reduce their reliance on government assistance by becoming more commercially oriented" (pp.24). Accordingly, quality with fewer resources and better trained employees result in a better future for sports organizations (Davakos, 2006).

Human resources management should be sufficiently considered (Kriemadis, 1997; Hoye et al., 2009; Barr., 2009); since sports organizations are "people-intensive" (Barr, 2009); and the successful implementation of a strategic planning process relies on the capabilities and skills of human resources (Kriemadis, 1997; Hoye et al., 2009). Kriemadis (1997) highlights the administration's responsibility to provide educational programs, emphasizing such skills as "human relations, analytical thinking, time management, and participatory decision making", in order to support the implementation of a strategic planning process (p.245). From another point of view, Earle (2009) states that it is imperative to identify the members of planning groups (or committees), the role of the Athletic Director, the process "champion" (usually a member of the senior management) and the way that the process is furthered (i.e. relationships, responsibilities and approval) before initiating a planning process. Above all, the management of sports organizations needs to be educated and have strong understanding of the current financial principles and future trends (Hoye et al., 2009). This is imperative in order to reach the mission and goals and obtain support to the organization's programs (Penry, 2008). Although an alternative leadership style may enhance development efforts to further successful financial projects (Wickstrom, 2006), leadership skills (e.g. creative and problem-solving, marketing expertise, manage complex financial issues) should be developed (Barr, 2009).

A strategic planning process is needed not only to be espoused, but more importantly to be effectively executed also (Vila and Canales, 2008). Furthermore, the capability of an organization to respond and adapt strategies appears to be a significant factor in an organization's success (Vila and Canales, 2008). Research and contemporary literature have contributed greatly to business sector, both in for-profit and non-profit organizations. Limited yet comprehensive research has been conducted for strategic planning .in the sports sector. Vila and Canales (2008) support the view that strategic planning may add value to organizations, in which top management understand individuals' aspirations and integrate them into a shared purpose. Some research conducted in a number of university athletics

departments by Kriemadis (1992, 1997, 2009) reveals in all cases that top management failed to transfer knowledge and experience to the university environment. Kriemadis (2009) explains this by assuming that either management of the athletics departments does not encourage the implementation and formulation of strategic plans or do not have access to both financial and human resources. This important reference may lead to the assumption that knowledge and experience are inadequate on their own when not establishing the appropriate structure and systems to enable their transformation into a strategic planning process and an organization's operation.

Hoye et al. (2009) claim that the principles originally used in business strategy may also be applied to sports organizations. Hoye et al. (2009) also state that it is essential for a sports organization to conduct an internal (i.e. capabilities, deficiencies, and stakeholders) and external (i.e. environment, competitors, and customers) analysis, to set the strategic direction (mission statement, vision statement, organizational objectives, performance measures) and to position the organization in the competitive environment through the selection of each potential strategy. The sport organization must also implement strategies, taking into account the necessary changes in organizational structure, culture, leadership, resource allocation and systems for delivering products and services. Finally, Hoye et al. (2009) support that the sport organization should evaluate the success of implementation, and measure performance by using key performance indicators related to each organizational objective. However, a sports organization, in today's competitive and rapidly changing environment may require re-positioning with a differentiated product and new destination (Vrondou et al., 2009). Vrondou et al. (2009) argue that demands for transformation of current administrative structure, as well as operational and policy systems may emerge in order to satisfy social and developmental needs,

While recent literature is limited in relation to strategic planning in sports, Kriemadis (1992, 1997, 2009) and Earle (2009) conducted studies identifying the use of strategic planning in intercollegiate athletics. Earle (2009) conducted a research study about strategic planning in Division I-A (Football Bowl Subdivision) athletic departments, and their use of strategic planning as a management tool. This research indicated that the majority of Division I-A athletic departments' strategic plans cover a five year period, indicating a long-term perspective. Furthermore, Earle's (2009) research reveals that almost all of the athletic departments include in their strategic planning a mission and a value statement and the development of goals and objectives. In addition, the majority of the respondents had undertaken environmental analysis and had a vision statement. However, Earle (2009)

identifies that athletic departments and the intercollegiate athletics industry are usually driven by the next event. Additionally, this author emphasizes that a long-term perspective enables the achievement of goals and objectives. Earle (2009) asserts that more comprehensive research is needed to reveal information about both the nature and time-frame of short-term objectives and strategies, other than focusing only on funding allocations and budgeting. Findings of Kriemadis (1992, 1997) research study conducted in National Collegiate Athletic Association (NCAA) Division I-A, reveal that there were different opinions about the number of years the short and long-range plans should cover; an aspect that may affect organizations' capability to anticipate a rapidly changing environment. Kriemadis (1992, 1997) argues that in light of the rapidly changing environment in which athletic departments operate, the time the short and long range plans cover should be reconsidered. Additionally as already mentioned, Earle's (2009) findings indicate that a significant percentage of athletic departments had been engaged in strategic planning. Kriemadis (1992, 1997, 2009) supports that an evaluation of the extent to which strategic planning is adopted may be useful, in order to classify the athletic departments as "strategic planners" or "non-strategic planners". Findings of Kriemadis' (1997) research reveal that although most of the athletic departments indicate that they were involved in strategic planning activities (i.e. vision, mission, goals and objectives, long-term and short-term strategies, and evaluation procedures), "strategic planners" were fewer than "non-strategic planners". According to Kriemadis (1997) the "strategic planners" fulfilled the conditions of "having formalized written, long-range plans; having assessed the external and internal environments; and having established strategies based on departmental mission and objectives" and "non-strategic planners" although some components of strategic planning process may be considered, they are not classified as strategic planners because they either "utilized short-range, written plans of action and budgets for current fiscal period (short-term planners); or they utilized short-range, unwritten plans that are stored in the memories of the athletic department's administrator's (intuitive planners); or they did not use any measurable planning procedures" (p.244). More specifically, Kriemadis (1992, 1997, 2009) identified the appropriate criteria in order to determine what strategic planning is, such as the development of long-range written plans, the assessment of the organization's internal and external environment and the establishment of strategies based on the organizational mission and objectives. Notwithstanding the above, Kriemadis (1992, 1997) argues that it is essential to further assess the actual implementation of a strategic plan when committing athletic departments' resources to achieve desired objectives.

Earle's (2009) research reveals that the majority of the athletic departments that have a written strategic plan use it to guide decision-making in their departments and to measure department's progress. Furthermore, a high percentage agreed that using the strategic planning process as a management tool improved the internal and external communication, enables the increment of revenue and enhanced departments' effectiveness. Strategic planning may help athletic departments to "think strategically, clarify future direction, deal effectively with rapidly changing environments, anticipate and initiate change" (Kriemadis, 1997, p.244) as well as uniting all shareholders and stakeholders efforts towards effectiveness and efficiency (Hoye et al., 2009).

Several factors that discourage athletic departments of intercollegiate industry from engaging in strategic planning activities have been identified (Kriemadis, 1992, 1997, 2009; Earle, 2009). Findings of Kriemadis' (1997) research reveals that nearly half of the "non-strategic planners" identified insufficient financial resources and time as factors that discourage them from engaging in strategic planning activities to a great extent, while the lack of a planning policy and of appreciation to planning were discouraging factors to a little extent and insufficient experience and training was a factor that discouraged them to some extent. Similarly, Kriemadis (2009) found that insufficient financial resources and time were the two factors that discouraged strategic planning activities to a great extent for more than a third of the athletic departments in the United Kingdom.

Earle's (2009) findings indicate that the most significant challenges of athletic departments are the conception that planning requires extra effort without reward, the lack of staff knowledge and the athletic directors' view that staff is not in favor of strategic planning. However, Earle (2009) supports that a contradiction exists between the survey results and the data collected from personal interviews. Survey results indicate that cost and time are not significant challenges to the strategic planning process whereas personal interviews indicate the opposite. Other factors may influence the commitment to initiating a strategic plan (Earle, 2009). Consequently, several factors may discourage the use of a strategic planning process. However, planning identifies, within a systemic way, the actions required for the implementation of a strategy (Hoye et al., 2009).

Recent literature reveals strategic planning models to be implemented in the sports sector. Kriemadis and Theakou (2007), based on the related literature identified the integration of various strategic planning models in public and non-profit organizations, that may be deployed in the sports sector. Kriemadis and Theakou (2007) conducted a study that examined the strategic planning process developed by a non-profit sport organization in

British Columbia, Canada. These authors acknowledged models such as "basic" strategic planning, "issue or goal-based" strategic planning, alignment (ensuring the alignment among organization's mission and its resources), scenario planning, and organic planning (which demands that values be shared and there is constant review of the systems processes). The study acknowledged that the sports organization developed its own strategic planning model based mainly on the "basic" strategic planning and the "issue or goal-based" model, taking into account their processes and activities. Kriemadis and Theakou (2007) suggest that sports organizations may develop their own strategic planning model through the selection and integration of various models aligned with organization's unique needs. However, Kriemadis and Theakou (2007) point out that an organization can combine scenario planning with most models, in order to enable strategic thinking and identify strategic issues and goals. Furthermore, Earle (2009) proposed a strategic planning model (based on the Yow et al. model) defining two stages, planning and implementation, and assumed that the strategic planning process is a constant and ongoing process that requires "assessment, evaluation and reaction" (p.101). However, although an assessment and re-examination of strategic issues over time is essential, both pro-activeness and performance measurement are fundamental to ensure the successful implementation of initially selected strategies and the achievement of goals and objectives (Kriemadis, 1992, 1997; Hoye et al. 2009).

Hoye et al. (2009) state that quantifiable key performance indicators aligned with specific objectives, may be used at any time to measure the progress, and also they will be useful at the evaluation stage for a comparison with actual results. Kriemadis et al. (2009) propose the "balance scorecard" as a comprehensive measurement and management system, to evaluate the performance of a University Athletic Department. The balance scorecard provides performance measurement indicators to measure the achievement of strategic targets and the accomplishment of organizations' mission (Kriemadis et al., 2009).

Consequently, although there seems to be limited research on strategic planning in sports organizations, a greater gap still exists in strategic planning for university sports. However, a comprehensive strategic planning model proposed by Kriemadis (1992, 1997) concerning the intercollegiate athletics may apply to other sports organizations, as a guide. The proposed model consists of three stages, strategy formulation, implementation, and evaluation (Kriemadis, 1992, p. 66-68):

1. Whether developing a new organization or reformulating the direction of an ongoing one the culture, policies, values, vision, mission, and long-term

objectives which will shape an organization's strategic posture must be determined;

2. The existence of social, political, educational, demographic legal, economic/tax, technological, and competitive changes require athletic departments to perform an effective external environmental assessment of the existing opportunities and threats, and in this way to anticipate and respond effectively to changes;

3. Athletic departments should evaluate their strengths and weaknesses which could influence the future of their survival and growth;

4. Periodically, athletic departments should reconsider / revise their stated values, vision, mission, and long-term objectives in order to be responsive to changes occurring in their external or internal environments;

5. After the athletic departments has established its long-term objectives (taking into consideration external and internal environmental assessments), the selection of long-term strategies that meet the department's objectives should be undertaken; (From step 1 to 5 is called Strategy Formulation).

6. Once selection of long-term strategies has been made, the next step would be the establishment of short-term objectives and short-term strategies to achieve long-term objectives and strategies; (Strategy Implementation).

7. The final component in the strategic planning process is the strategy evaluation and is essential to ensure the stated objectives are being achieved. Reviewing internal and external factors, measuring performance, and taking corrective actions are the activities associated with this component.
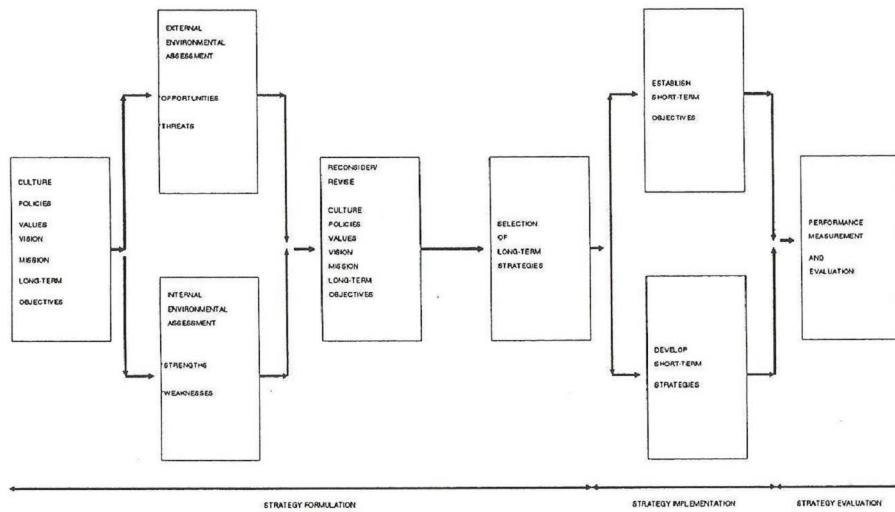
Figure 2. Strategic planning process model, NCAA Division I-A Athletic Departments (Source: Kriemadis, 1992, p. 69; 1997, p.243).

Finally, contemporary research details strategic planning models in the business, governmental and non-profit organizations. In addition, limited yet comprehensive models in the sports sector have been identified. Based on the literature concerning the formulation, implementation, and evaluation of a strategic planning process, a framework of a strategic planning process for organizational success may be developed.

Summary

Chapter I I reviewed some of the recent literature related to strategic planning in the for-profit and non-profit sectors, higher education institutions, intercollegiate athletics, and sports organizations. More specifically, Chapter I I presented the framework and significance of strategic planning, an analysis of the strategic planning process, planning in higher education, and finally strategic planning in university sports organizations. Limited yet comprehensive research studies concerned with strategic planning in intercollegiate athletics reveal the need for athletic departments to engage in strategic planning. Given that university sports organizations are closely associated with higher education institutions, it was necessary to review the related studies concerning the nature of the environment in which they collaborate and compete, as well as their planning efforts. Despite the limited research in higher education, university sports and sports in general, the literature related to strategic planning in the for-profit and non-profit sector may have implications for university sports organization.

III. Research Methods and Procedures

This chapter analyzes the methods and procedures that were employed in this study. The population, instrument development, instrument reliability, validity, data collection, and data analysis are exemplified in this chapter.

3.1 *Population*

The population of the study consisted of all 153 University Sports Organizations official members as defined by F.I.S.U. The names of the executives and their respective contact information (mailing address, e-mail, fax) were selected initially from the FISU official site. A first e-mail was sent to confirm the above contact information, followed by verification from the Directory of FISU.

A total 82 University Sports Organizations of the 153 University Sports Organizations (members of F.I.SU.) responded to the survey (53.6%). The respondents of the respective University Sports Organizations that completed the questionnaire had the following characteristics concerning their status (see Figure 3) and their educational background (see Figure 4). Related to the respondent's status, thirty (36.6 percent) of the individual respondents were Presidents, thirty-six (43.9%) were Secretary-General and sixteen (19.5%) were accountable for their respective University Sports Organization's operation. According to the individual respondent's educational background, thirty-nine (49%) stated that they had obtained a Master's Degree, twenty-two (27%) a Doctoral Degree, fourteen (17%) a Bachelor Degree and six (7%) a Post-Doctoral Degree. These important data indicate that the individuals who responded regarding the planning activities of their respective University Sports Organization were qualified to complete the questionnaire.
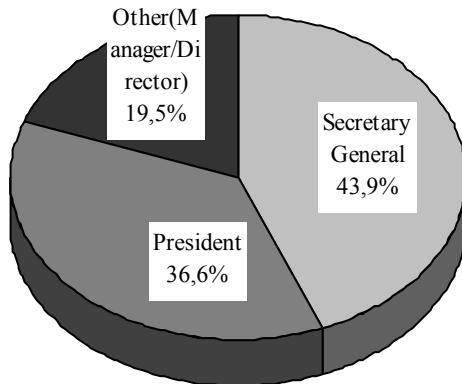
Figure 3. Individual respondents' status in the organization (in percentage form)
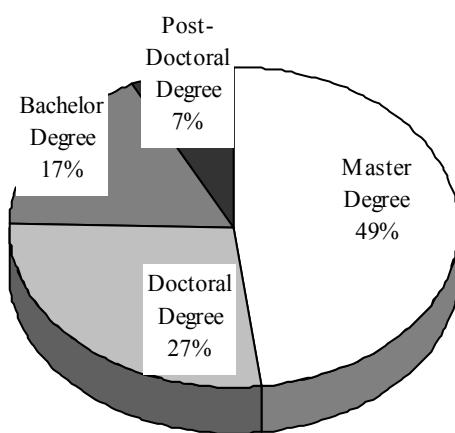
Figure 4. Individual respondents' educational background (in percentage form)

*one missing value

"Statistical power relates to the number of participants who took part in the study. To infer generalizability, one expects than an expected difference or relation will be true only if a sufficient number of subjects participated in the study" (Tenenbaum & Driscoll, 2005, pp.86). Given that this study's field of research is strategic planning (a multidimensional issue) and that the questionnaires were collected worldwide, a response rate of 53.6 percent was considered to be very good. In addition, the characteristics of non-respondents did not follow a specific pattern in term of geographical location. According to the above, it can be assumed that the findings of this study may generalize in target population.

3.2. *Instrument Development*

A questionnaire designed by Thanos Kriemadis (1992) has undergone some modification for the requirements of this study. Questions are structured from multiple items answered in a typical Likert scale. Dichotomous, open and multi-choice questions are also involved. The questionnaire may offer a means of assessing the extent to which elements of the strategic planning process were present in university sport organizations' planning efforts and the extent to which these organizations are satisfied with their planning activities' outputs.

3.2.1.. *Instrument Validity.* The content validity of the initial questionnaire was determined by Thanos Kriemadis for the requirements for the degree of "Doctor of Philosophy in Education" (Kriemadis, 1992). A panel of experts' suggestions (five panel members), in the fields of strategic planning, management and from F.I.S.U. Executive Committee, contributed to the content validity of the modified questionnaire. Each panel member received a letter describing the purpose of the study followed by a copy of the originally unrefined questionnaire and asked to answer the following two questions:

1. Is this question clear and relevant to the practices of both planning activities and University Sports Organizations?
2. Is this question appropriate to the University Sports language?

The questionnaire was refined according to the suggestions made by the panel of experts and finalized with the assistance of the Associate Professor Thanos Kriemadis, specialized in Strategic Planning.

3.2.2. *Instrument Reliability.* Since most of the questions are structured from multiple items answered in a typical Likert scale, factor analysis followed by Cronbach's reliability analysis were employed in a pilot attempt to ascertain the multidimensionality of each construct and the internal consistency of the extracted factors. Factor analysis yielded components (factors) with an eigenvalue greater than one that explains a significant proportion of the total variability. Both the Bartlett's test of sphericity and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy are considered to examine whether a factor analysis for the particular set of data is

applicable. As a measure of the internal consistency of the constituent items of a factor their Cronbach's alpha coefficients are reported below.

The scores of the extracted components were as follows:

1. Item A (see Table 2)

   Component 1, Cronbach's alpha=.782

   Component 2, Cronbach's alpha=.676

2. Item B (see Table 5)

   Component 1, Cronbach's alpha=.590

   Component 2, Cronbach's alpha=.793

   Component 3, Cronbach's alpha=.746

   Component 4, Cronbach's alpha=.789

   Component 5, Cronbach's alpha=.746

3. Item C (see Table 7)

   Component 1, Cronbach's alpha=.824

   Component 2, Cronbach's alpha=.702

   Component 3, Cronbach's alpha=.740

   Component 4, Cronbach's alpha=.575

4. Item D (see Table 11)

   Component 1, Cronbach's alpha=.879

   Component 2, Cronbach's alpha=.810

   Component 3, Cronbach's alpha=.752

5. Item W (see Table 13)

   Component 1, Cronbach's alpha=.885

   Component 2, Cronbach's alpha=.893

   Component 3, Cronbach's alpha=.811

   Component 4, Cronbach's alpha=.585

As it can be seen from the above, most of the extracted factors satisfy Nunnaly's (1978) criterion that the internal consistency of the items constituting a factor is considered satisfactory if it is at least equal to 0.700.

The decision concerning how many factors should be retained in the final model is usually based on the Kaiser criterion, which states that factors should have an eigenvalue greater than one. Eigenvalues are proportional to the variance of the model. Each of the original variables has an eigenvalue of 1, so if an extracted factor has an

eigenvalue more than 1, it means that it explains more variance than each of the original variables.

More studies are essential in order to address the multi-faceted issue of the validity of the questionnaire and to identify the nature and the logic of the extracted factors.

3.3. *Data collection*

Each University Sports Organization was notified about the research study one week before data collection process started. At the same time, each organization was asked to confirm their respective e-mail and post-mail addresses, as well as fax numbers. The survey's material was sent to all the 153 members of F.I.S.U., to their respective e-mail addresses. The survey's material contained: a) a cover letter explaining the purpose and importance of the study (see Appendix B) and b) the refined questionnaire (see Appendix A). University Sports Organizations were asked to return the questionnaire within twenty days. Approximately two weeks after the return deadline, a follow-up letter was sent to the organizations who failed to respond to the first request on time (see Appendix C). At the same time, a follow-up letter was also sent to the Presidents of the five Continental Associations for University Sports in order to ensure the receipt of the second request. A total of 82 responses (53.6%) were collected.

3.4. *Data analysis*

After the questionnaires were collected, the data from each were entered into the statistical testing program, the Statistical Package for the Social Sciences (SPSS-x), Version 17.0.

The research questions to be investigated were:
1. What is the extent to which the strategic planning process is being used in University Sports Organizations (members of F.I.S.U.)?
2. What are the key factors that discourage University Sports Organizations (members of F.I.S.U.) from engaging in strategic planning activities?
3. What is the level of satisfaction of University Sports Organizations (members of F.I.S.U.) in relation to predetermine performance indicators?

4. Is it possible to develop a generic strategic planning process model, which can be implemented by University Sports Organizations (members of F.I.S.U.)?

The hypotheses to be tested were:

1. The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the organizations' model of governance (public vs. private vs. cooperative).

2. The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of students participating in competitions of the university sports organizations to the total number of students engaged in sport activities in higher education.

3. The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of self-generated revenues as opposed to state funds.

Frequencies are reported in absolute and percentage form and, where appropriate, compared with chi-square and binomial test. Mean values are expressed as mean ± standard deviation, were compared with the paired sampled t-test and correlated with Pearson's correlation coefficient. The level of significance was set at 0.05.

Research questions one, two, and three were answered by using standard descriptive statistics including mean, standard deviation, and percentages. The repeated measures Anova, the chi-square test, the paired sample t-test and the t-test independent samples were used for the data analysis. Factor analysis attempted to identify underlying variables or factors that explain the pattern of correlations within a set of observed variables. Both the Bartlett's test of sphericity and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy are considered to examine whether a factor analysis for the particular set of data is applicable. Hypotheses one and three were tested by using chi-square, while hypothesis two was tested by using ANOVA analysis.

Based on the findings and review of literature a strategic planning process model was created by the researcher in order to answer the fourth research question. Both the proposed strategic planning process model and the study's results were sent to those who showed interest in reviewing the findings. Consequently, all the survey's respondents received a packet material containing: a) the proposed strategic planning process model, b) the study's results and c) a thank you letter for their participation in this study.

IV. PRESENTATION AND ANALYSIS OF DATA

4.1. *Introduction*

This chapter presents the findings of this study as well as the analyses of these findings. It has been organized to systematically present the information obtained from the survey instrument and the statistical analysis used to answer the research questions and hypotheses. A total of 82 (53.6 percent) University Sports Organizations (members of F.I.S.U.) responded to the survey.

Research Questions

1. What is the extent to which the strategic planning process is being used in University Sports Organizations members of International University Sports Federation (FISU)?

2. What are the key factors that discourage University Sports Organizations members of International University Sports Federation (FISU) from engaging in strategic planning activities?

3. What is level of satisfaction of University Sports Organizations' members of International University Sports Federation (F.I.S.U.) in relation to predetermine performance indicators?

4. Is it possible to develop a generic strategic planning process model, which can be implemented by University Sports Organizations members of International University Sports Federation (FISU)?

Hypotheses Tested

1. The extent of strategic planning used by University Sports Organizations members of F.I.S.U. is independent of the organizations' model of governance (public vs. private vs. cooperative).

2. The extent of strategic planning used by University Sports Organizations members of F.I.S.U. is independent of the percentage of students participating

in competitions of the university sports organizations to the total number of students engaged in sport activities in higher education, for the current fiscal year.

3.   The extent of strategic planning used by University Sports Organizations members of F.I.S.U. is independent of the percentage of the university sports organizations self-generated revenues as opposed to state funds, for the current fiscal year.

4.2. *Research Question One*

What is the extent to which the strategic planning process is being used in University Sports Organizations members of International University Sports Federation (FISU)?

Questionnaire Item A

In the first question (A) the participants were asked to identify which of the nine reported activities are included in their organization's current planning process. The absolute and percentage frequencies of their responses are shown in Table 1. According to the responses, eight out of the nine activities are included in the organizations' current planning process at proportions greater than 90%.

According to the survey responses, 75 (91.5 percent) University Sports Organizations (members of F.I.S.U.) have developed a vision of the organization's future direction and aspirations. Seventy-five (91.5) organizations have also developed a mission statement that describes the organization's purpose and philosophy. The responses show that 80 (97.6 percent) organizations assess their strengths and weaknesses, while 74 (90.2) assess the opportunities and threats in their external environment. Eighty (97.6) organizations have stated that they develop goals and objectives. There is one exception though, and this is item 6 (Developing long-range plans or strategies to achieve organization's mission and objectives), which is reported in the organizations' current planning process by only 80.5% (66/82) of the respondents. This response frequency is significantly lower than the corresponding response frequencies at 91.5% (75/82) ($\chi2$=4.1, d.f.=1, p<0.05). In this case the chi-square tests the equality of the frequency responses in two items. Another suitable test in this occasion is the binomial test which takes the response frequency in one item as

the expected frequency and checks whether the response frequency in another item is significantly different from this expected frequency. In this case the response frequency of item 6 is significantly lower even than the response frequency of item 4 at 90.2% (74/82) ($p<0.01$). Table 1 also shows that 77 (93.9) responding organizations develop short-range plans to achieve short-range objectives. Finally, 72 (90.0 percent) university sports organizations periodically evaluate the performance of their planning process, while 75 (91.5) evaluate the performance relative to the organization's mission and objectives.

Table 1. Activities Included in the University Sports Organizations' Current Planning Process

	Activity	Included	Not included
1.	Developing the vision (future image of your organization) of the organization's future direction and aspirations	75 (91.5%)	7 (8.5%)
2.	Developing the mission statement (purpose of your organization's existence) that describes the organization's purpose and philosophy	75 (91.5%)	7 (8.5%)
3.	Assessing the organization's strengths and weaknesses	80 (97.6%)	2 (2.4%)
4.	Assessing the organization's opportunities and threats	74 (90.2%)	8 (9.8%)
5.	Developing the organization's goals and objectives	80 (97.6%)	2 (2.4%)
6.	Developing long-range plans (or strategies) to achieve organization's mission and objectives	66 (80.5%)*	16 (19.5%)
7.	Developing short-range plans	77 (93.9%)	5 (6.1%)
8.	Periodically evaluating the performance of the organization's planning process (items ≠1 to ≠7 above)*	72 (90.0%)	8 (10.0%)
9.	Periodically evaluating the organization's performance relative to mission and objectives	75 (91.5%)	7 (8.5%)
Note: Absolute and percentage distribution of activities included in the organizations' current planning process. In item 8 there were two missing responses. The corresponding percentages refer to the number of valid responses.)			

The nine items of question A were subjected to factor analysis using the principal components approach with a subsequent varimax rotation of the extracted components. Both the Bartlett's test of sphericity ($\chi2=226.4$, d.f.$=36$, $p<0.01$) and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (0.656) indicate that a factor analysis of the variables is not inappropriate. The only drawback of the underlying data is that the nine variables under consideration are dichotomous variables (No/Yes).

Factor analysis yielded two components (factors) with an eigenvalue greater than one that explain 55.2% of the total variability (see Table 2 and Figure 5). The first component is correlated with items 8, 6, 9, 3, 4 and 7, while the second component can be explained by the variability of items 2, 1 and 5.

Table 2. University sports Organizations' Current Planning Process (latent variables)

Item	Component	
	1	2
A8	0.835	
A6	0.777	
A9	0.698	
A3	0.647	
A4	0.633	
A7	0.578	
A2		0.886
A1		0.740
A5		0.705
Eigenvalue	3.0	1.9
Variance explained	33.8%	21.4%
Cronbach's alpha	0.782	0.676

Note: Loadings of the original nine variables on the two extracted and rotated factors in question A, eigenvalues, variance explained by the components and internal consistency (Cronbach's alpha) of the items. ($\chi2=226.4$, d.f.$=36$, $p<0.01$)

Component Plot in Rotated Space
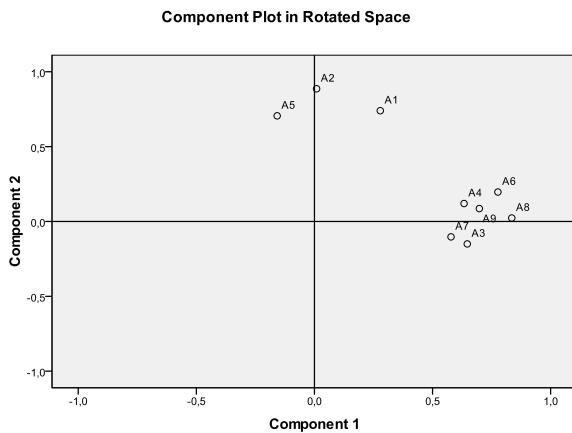
Figure 5. University sports Organizations' Current Planning Process. Component plot in rotated space, for question A.

Questionnaire Item E

In question E the participants were asked to indicate what describes best the level of planning in their organization from a list of mutually exclusive descriptions. Figure 6 shows the absolute and percentage frequencies of the answers given to question E. Table 3 shows that only 29 (36.7 percent) of the responding organizations have a) developed formalized written, long-range plans; b) assessed the internal and external environment; c) developed strategies to meet organization's mission and objectives; and d) evaluated past, current, and future performance. Accordingly, 36.7 percent of the university sports organizations may be identified as strategic planners. The findings also show that 39 (49.4 percent) organizations utilize written short-range operational budgets and plans of action for the current fiscal period. Eight (10.1) of the responding organizations utilize informal, unwritten plans developed and implemented, according to the intuition and experience of the administrative team. A very low percentage (3.8 percent) stated that had no measurable structured planning.

Table 3. Level of Planning in University Sports Organizations

Plans	Frequency	Percentage
Structured long-range plans	29	36.7
Operational plans	39	49.4
Intuitive plans	8	10.1
Unstructured plans	3	3.8
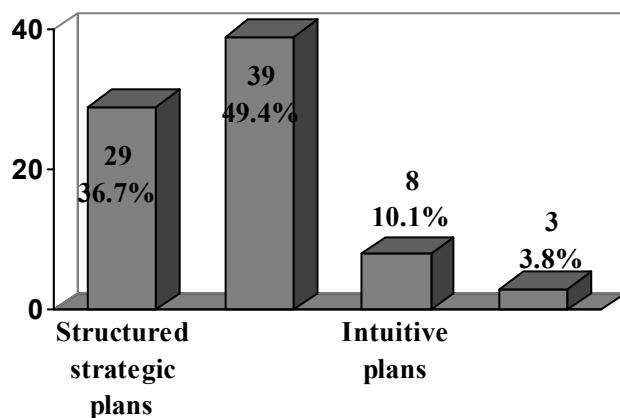
Figure 6. Absolute and percentage frequencies of the level of planning.

As Table 4 shows, 96.6% of the respondents identified as strategic planners develop long-range plans (or strategies) to achieve the organization's mission and objectives. Consequently, only 1/29 (3.4%) of strategic planners do not develop long-range plans. Conversely among non-strategic planners only 15/50 (30%) develop long-range plans. The difference is statistically significant (χ^2=32.775, df=1, p<0.001). The odds ratio (OR) is equal to 65.3 with 95% CI (95% confidence intervals) 8.1-525.2. This means that the odds of strategic planners developing long-term plans in comparison to non-strategic planners are approximately 65 times greater.

Table 4. Strategic, non- strategic planners and the development of long-range plans (or strategies)

	Development of long-range plans		Total
	Yes	No	
Strategic planners	28 (96.6%)	1 (3.4%)	29
Non-strategic planners	15 (30.0%)	35 (70.0%)	50
Total	43 (54.4%)	36 (45.6%)	79
Note: χ^2=32.775, df=1, p<0.001			

Questionnaire Item B

In question B the participants were asked to indicate to what extent each of the 22 external factors was considered when formulating their plans. Table 5 depicts the means and standard deviations of the scores of the 22 items included in question B. The items are shown in descending order of the means. The repeated measures analysis of variance revealed that there are significant differences between the mean values of the items ($F_{21,1386}$=20.1, p<0.001).

An alternative way to present and analyze the data is to show, either in absolute and/or in percentage form, the number of organizations that consider each factor to a "great" or "very great" extent. The external factors that bear the most weight in the formulation of the organizations' plans are N.U.S.F. policies and future trends, educational trends and higher education's policy and strategy. The proportion of organizations which stated that they consider these three factors to a "great" or "very great" extent was more than 70%. Conversely, factors such as religious groups, parents of the student-athletes and entertainment industry are considered to a "very great" or "great" extent by less than 25%. The only factor that was considered to a "very little" or "little" extent by more than 70 percent of university sports organizations was religious groups (see Figure 7).

Table 5. External Factors considered in the Planning Process

Item	Description	Mean	SD
9	N.U.S.F. policies and future trends	4.13	0.97
2	Educational trends	3.99	1.08
3	Social trends (values, attitudes)	3.85	0.94
20	Higher Education's policy and strategy	3.76	1.10
15	Competitors (e.g. other sport federations)	3.67	1.20
4	Economic/Tax Considerations	3.64	1.20
19	Board of Trustees (University Administration)	3.60	1.29
8	Community opinion	3.55	1.05
6	State/Federal mandates and guidelines	3.54	1.27
11	Sponsors	3.40	1.35
21	Governmental Health Policy	3.36	1.29
12	Media	3.36	1.00
7	Technology trends	3.34	1.12
18	Spectators	3.25	1.22
5	Demographic trends	3.18	1.28
17	Suppliers (equipment, services)	3.06	1.20
1	Political trends	3.03	1.34
13	Civic organizations	2.87	1.11
10	Small and Medium Enterprises plans	2.85	1.32
16	Entertainment industry	2.63	1.27
22	Parents of the student-athletes	2.52	1.30
14	Religious groups	1.70	1.06

Note: Means and standard deviations of the scores of the 22 items included in question B. The items are shown in descending order of the means. ($F_{21,1386}$=20.1, $p<0.001$).

"Great" or "Very Great" extent	"Little" or "Very Little" extent
Results are shown in descending order	Results are shown in ascending order
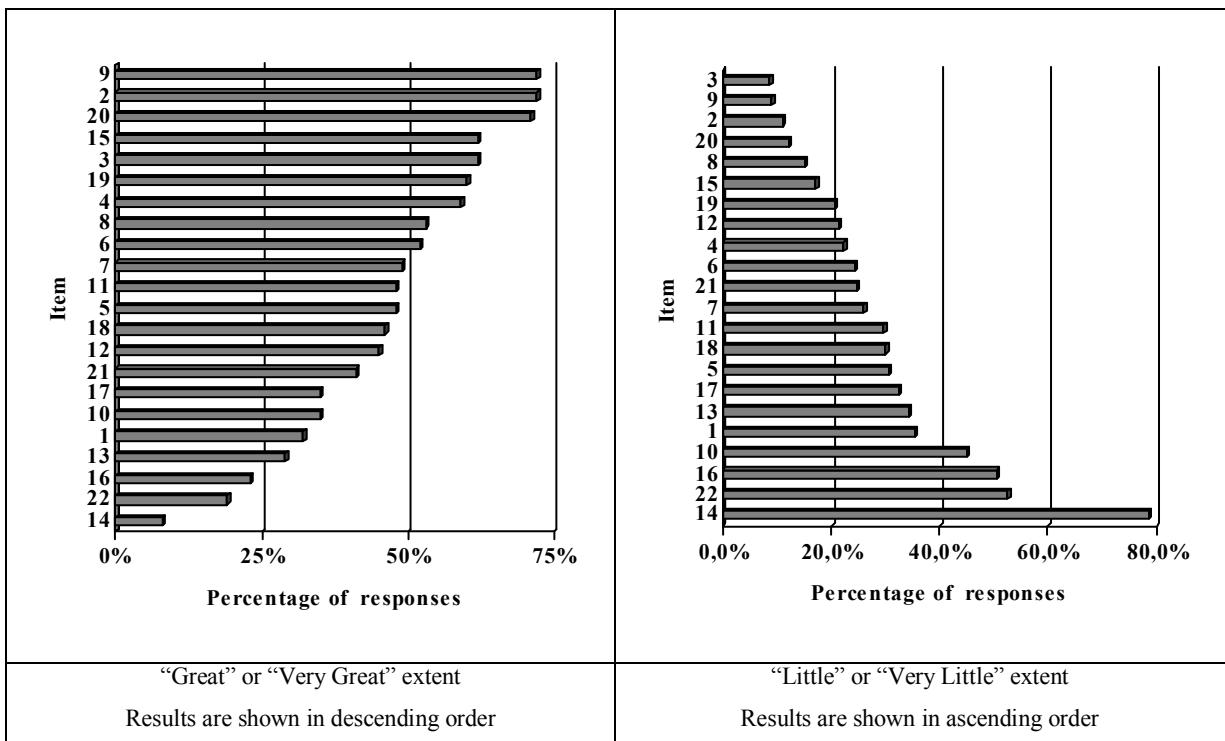
*Scaling: 1=Very Little 2=Little 3=Some 4=Great 5=Very Great

Figure 7. Extent to which external factors are considered in the planning process.

The 22 items of question B were subjected to factor analysis using the principal components approach with a subsequent varimax rotation of the extracted components. Both the Bartlett's test of sphericity ($\chi 2$=637.4, d.f.=231, p<0.01) and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (0.784) indicate that a factor analysis is applicable. Factor analysis yielded six components (factors) with an eigenvalue greater than one that explain 64.4% of the total variability (see Table 6).

Table 6. External Factors Considered in the Planning Process (latent variables).

	Component					
Item	**1**	**2**	**3**	**4**	**5**	**6**
B6	0.729					
B1	0.613					
B3	0.591					
B8		0.813				
B18		0.709				
B2		0.518				
B5		0.486				
B12			0.694			
B9			0.660			
B11			0.596			
B7			0.584			
B13			0.579			
B20				0.802		
B19				0.732		
B21				0.685		
B22				0.484		
B15					0.740	
B16					0.657	
B10					0.537	
B17					0.525	
B14						0.733
B4						-0.623
Eigenvalue	**2.76**	**2.63**	**2.52**	**2.52**	**2.23**	**1.52**
Variance explained	**12.5%**	**11.9%**	**11.5%**	**11.5%**	**10.1%**	**6.9%**
Cronbach's alpha	**0.590**	**0.793**	**0.746**	**0.789**	**0.746**	**-**

Note: Loadings of the original 22 variables on the six extracted and rotated factors in question B, eigenvalues, variance explained by the components and internal consistency (Cronbach's alpha) of the items. ($\chi2$=637.4, d.f.=231, p<0.01).

Questionnaire Item C

In question C the participants were asked to indicate the extent that each of the 15 internally related factors was considered, when formulating their plans. Table 7 depicts the means and standard deviations of the scores of the 15 items included in question C. The items are shown in descending order of the means. The repeated measures analysis of variance revealed that there are significant differences between the mean values of the items ($F_{14,994}=10.1$, $p<0.001$).

An alternative way to present and analyze the data is to show, either in absolute and/or in percentage form, the number of organizations that consider each internally related factor to a "great" or "very great" extent.

Student participation in sport activities greatly outweighs all the other internal factors taken into account in the formulation of the organizations' plans, since the proportion of organizations which stated that they consider this factor to a "great" or "very great" extent was 89%. Other factors that were appreciated to a "very great" or "great" extent by 70 percent or more of the responding university sports organizations when formulating their plans were: a) organizational excellence i.e. quality, effectiveness and efficiency of the organization (80.5%), b) athletic performance excellence (78%), c) technical delegates' (i.e. coaches', competition officials') opinion (73.2%), d) financial performance (72.2%), and e) creativity and innovation i.e. new ideas, empowerment and involvement of the staff (72%). Conversely, marketing processes (informational, programming and control systems) bear a minimal weight as an internal factor (40.2%), followed by advisory committees (46.9%). There were no items incorporated to a "very little" or "little" extent by 70 percent or more of the university sports organizations (see Figure 8).

The overall mean of the 15 internal factors is 3.87±0.62, while the mean of the 22 external factors is 3.23±0.68. The difference is statistically significant (paired t-test, t=10.2, d.f.=81, $p<0.01$). Consequently, internal factors are more significant than external factors in the formulation of the organizations' plans. At the same time the two means are significantly correlated (Pearson's r=0.614, p<0.01).

Table 7. Internal Factors considered in the Planning Process

Item	Description	Mean	SD
2	Student participation in sport activities	4.49	0.75
14	Organizational excellence (quality, effectiveness and efficiency of your organization)	4.17	0.77
1	Athletic performance excellence	4.13	0.89
15	Creativity and innovation (new ideas, empowerment and involvement of the staff)	4.08	0.87
6	Student-athletes' opinion	4.00	0.86
7	Technical delegates' (e.g. coaches', competition officials') opinion	3.97	0.87
3	Financial performance	3.94	0.99
4	Administration staff performance	3.93	0.86
10	Adequacy of facilities	3.89	1.04
8	Technical delegates' (e.g. coaches', competition officials') performance	3.88	0.96
11	Academic schedule	3.83	1.16
9	Athletes' academic achievement	3.79	1.06
13	Training and education of the staff	3.53	1.10
5	Advisory committees	3.43	1.11
12	Marketing processes (informational, programming and control systems)	3.32	0.99

Note: Means and standard deviations of the scores of the 15 items included in question C. The items are shown in descending order of the means. ($F_{14,994}$=10.1, $p<0.001$)
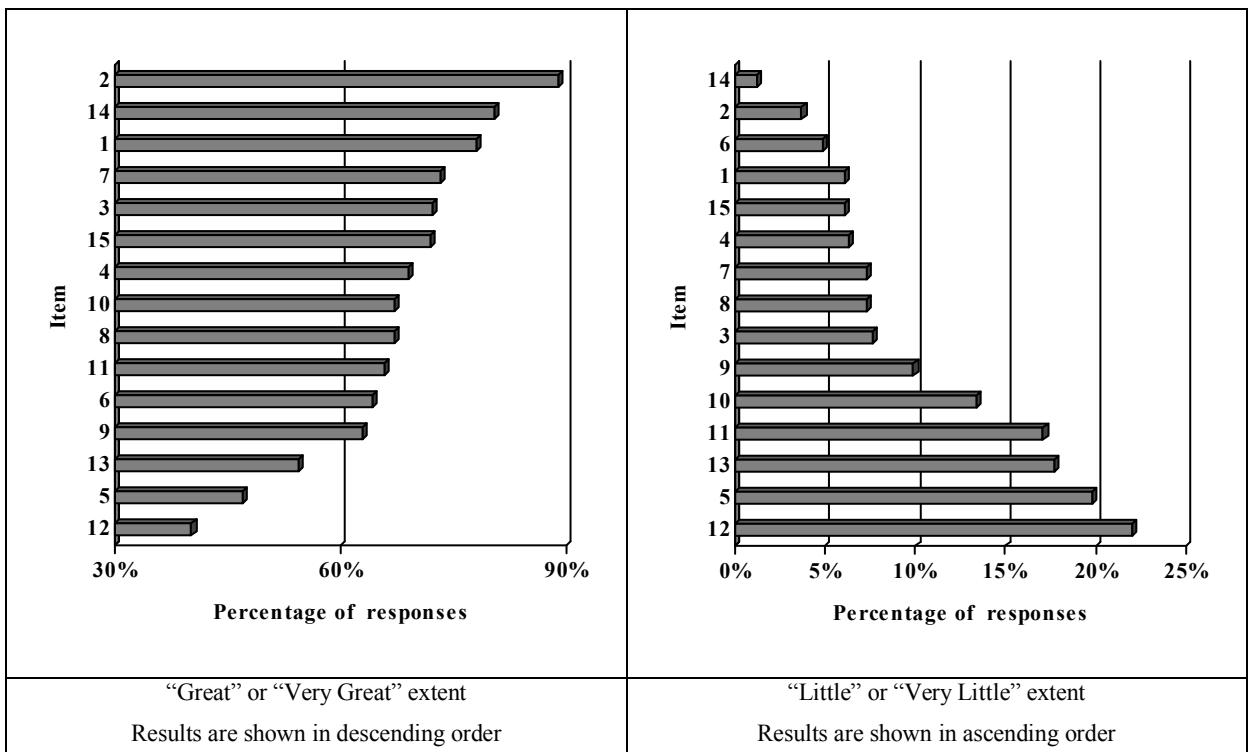
*Scaling: 1=Very Little 2=Little 3=Some 4=Great 5=Very Great

Figure 8. Extent to which internal factors are considered in the planning process

The 15 items of question C were subjected to factor analysis using the principal components approach with a subsequent varimax rotation of the extracted components. Both the Bartlett's test of sphericity ($\chi 2$=469.4, d.f.=105, p<0.01) and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (0.759) indicate that a factor analysis is appropriate. Factor analysis yielded four components (factors) with an eigenvalue greater than one that explain 62.8% of the total variability (see Table 8).

Table 8. Internal Factors Considered in the Planning Process (latent variables)

Item	Component			
	1	2	3	4
C5	0.803			
C7	0.793			
C8	0.701			
C14	0.589			
C4	0.546			
C2		0.826		
C6		0.628		
C10		0.582		
C9			0.798	
C11			0.692	
C12			0.614	
C13			0.558	
C1				0.737
C3				0.649
C15				0.471
Eigenvalue	2.96	2.29	2.25	1.92
Variance explained	19.7%	15.2%	15.0%	12.8%
Cronbach's alpha	0.824	0.702	0.740	0.575

Note: Loadings of the original 15 variables on the four extracted and rotated factors in question C, eigenvalues, variance explained by the components and internal consistency (Cronbach's alpha) of the items. ($\chi 2$=469.4, d.f.=105, p<0.01)

Questionnaire Item F

In question F the participants were asked to indicate the extent to which their organization's plan incorporates the items listed in Table 9. The repeated measures ANOVA showed that the mean values of the responses are not equal ($F_{6,456}$=21.7, p<0.01).

An alternative way to present and analyze the data is to show, either in absolute and/or in percentage form, the number of organizations that report each item incorporated in the planning of their organizations to a "great" or "very great" extent. Financial and Event Management plans are the two items that are incorporated to a

greater extent than all the other plans, since the proportion of organizations which stated that they consider these factors to a "great" or "very great" extent was 72.9% and 72.6% respectively. The findings also show that factors that are considered by less than 70 percent were: a) Quality management plan (51.2%), b) Human Resources plan (50.6%), c) Contingency plan (34.2), d) Facilities master plan (33.3%), and e) Marketing plan (24.7%). There were no items incorporated to a "very little" or "little" extent by 70 percent or more of the university sports organizations. The results of this analysis are shown in Figure 9.

Table 9. Plans incorporated by the University Sports Organizations

Item	Description	Mean	SD
3	Financial plan	3.90	1.06
7	Event Management plan	3.84	1.15
4	Human Resources plan	3.40	1.15
6	Quality management plan	3.31	1.25
5	Contingency plan	2.99	1.06
2	Facilities master plan	2.84	1.20
1	Marketing plan	2.75	1.11
Note: Means and standard deviations of the scores of the 7 items included in question F. The items are shown in descending order of the means. ($F_{6,456}$=21.7, p<0.01)			

"Great" or "Very Great" extent	"Little" or "Very Little" extent
Results are shown in descending order	Results are shown in ascending order
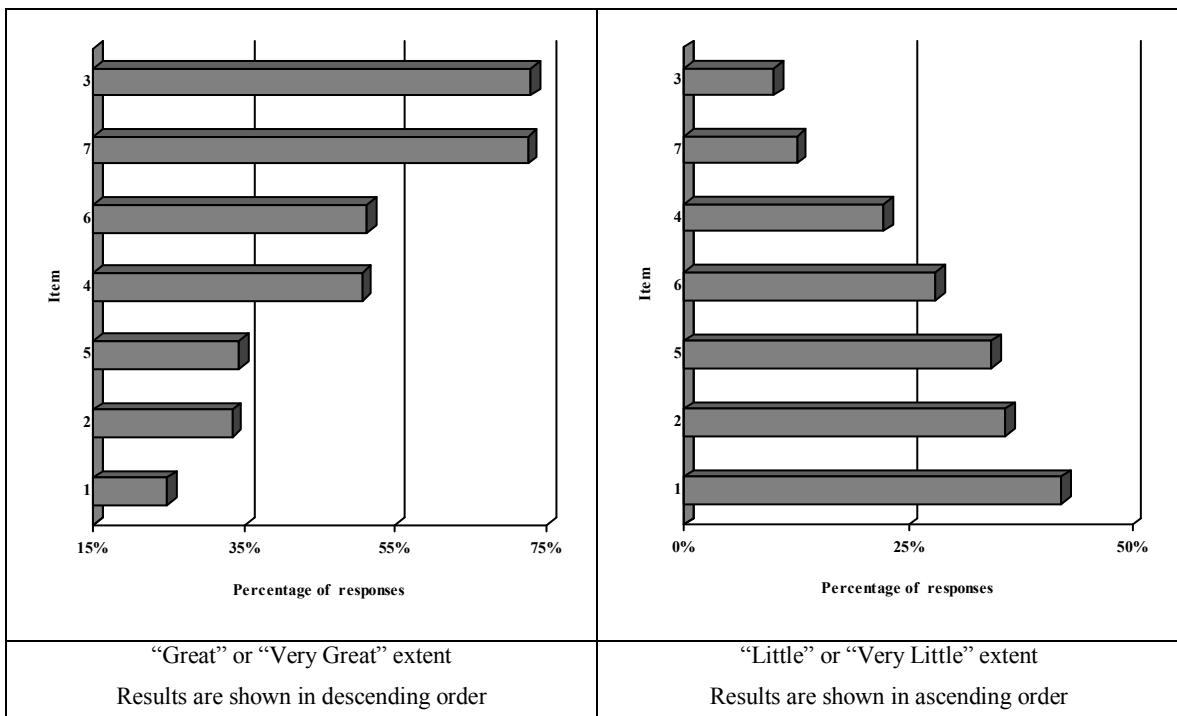
*Scaling: 1=Very Little 2=Little 3=Some 4=Great 5=Very Great

Figure 9. Extent to which, specific plans are incorporated by university sports organizations

The 7 items of question F were subjected to factor analysis using the principal components approach with a subsequent varimax rotation of the extracted components. Both the Bartlett's test of sphericity ($\chi 2$=190.3, d.f.=21, p<0.01) and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (0.821) indicate that a factor analysis is appropriate. However, the factor analysis did not yield more than one factors.

Table 10 shows the mean values and the standard deviations of the participants' responses to the seven items of question F depending on the answers to item A6 (where the participants were asked to indicate whether they were developing long-range plans or strategies to achieve the organization's mission and objectives). The "yes" and "no" responses to this item formed the two independent samples for which the mean values of the seven items of question F were tested with the independent samples t-test. The analysis indicated that there was significant relationship between the development of long-range plans (strategies) and a) quality management plan (t= 2.31, df=80, p<0.05; b) contingency plan (t= 2.46, df=80, p<0.05); and c) marketing plan (t=2.69, df=80, p<0.05).

Table 10. Comparison between item A6 and questionnaire item F

Item	Description	Response to item A6		t-value (df=80)	p-value
		Yes	No		
3	Financial plan	3.88±1.14	3.88±0.89	0.006	0.995
7	Event Management plan	3.95±1.06	3.44±1.32	1.66	0.102
4	Human Resources plan	3.49±1.13	2.88±1.09	1.97	0.053
6	Quality management plan	3.47±1.27	2.69±0.95	2.31	0.023*
5	Contingency plan	3.12±1.11	2.36±0.75	2.46	0.016*
2	Facilities master plan	2.94±1.25	2.44±1.15	1.46	0.149
1	Marketing plan	2.91±1.15	2.07±0.80	2.69	0.009*

Note: Means and standard deviations for each of the seven items in question F depending on whether the organizations were developing long-range plans (or strategies) to achieve their mission and objectives. Comparisons between the two groups with the t-test (df=80, $p<0.05$).

Table 11 analyzes the use of different plans to a "great" or "very great" extent by strategic planners in comparison to non-strategic planners in absolute and percentage proportions. Statistically significant differences between the proportions of strategic and non-strategic planners are manifested when the lower 95% confidence interval is equal to or greater than 1. Thus statistically significant differences are found in event management, quality management, marketing and contingency plans. The greatest proportional difference between strategic and non-strategic planners was evidenced in the incorporation of quality management plan (72.4%-40.0%=32.4%).

Table 11. The incorporation of different plans by strategic and non-strategic planners

	Total	Strategic planners	Non-strategic planners	OR	95% CI
Marketing plan	20 (25.6%)	12 (41.4%)	8 (16.3%)	3.6	1.3-10.4*
Facilities master plan	27 (34.6%)	9 (32.1%)	18 (36.0%)	0.8	0.3-2.2
Financial plan	59 (75.6%)	22 (78.6%)	37 (74.0%)	1.3	0.4-3.9
Human Resources plan	41 (52.6%)	17 (60.7%)	24 (48.0%)	1.7	0.7-4.3
Contingency plan	27 (35.5%)	14 (50.0%)	13 (27.1%)	2.7	1.0-7.1*
Quality management plan	41 (51.9%)	21 (72.4%)	20 (40.0%)	3.9	1.5-10.6**
Event Management plan	57 (74.0%)	26 (89.7%)	31 (64.6%)	4.8	1.3-18.2*
Note: Risk Estimate was used for this comparison. Asterisks denote statistically significant differences between strategic and non-strategic planners with the chi-square test (*- p <0.05, **- p<0.001).					

Questionnaire Item G

According to the survey responses (see Figure 10), fifty (68%) of the responding university sports organizations utilize short-range plans which cover up to one year; fifteen (20%) cover approximately two years; and nine (12%) cover more than two years. Consequently, eight missing values were found concerning short-range plans. When it comes to the number of years that long-range plans cover, twenty-two (31%) of the responding organizations indicate that they cover up to three years; thirty-seven (52%) cover between four and five years; and twelve (17%) cover more than five years. Eleven university sports organizations have not answered this item. The mean value of years short-range plans cover was 1.96±2.30 and 1.43±1.03 years for strategic and non-strategic planners respectively. The difference was not statistically significant (t=1.35, df=69, p=0.181). Conversely, the mean value of years long-range plans cover was 5.56±2.83 and 3.92±2.39 years for strategic and non-strategic planners respectively. The difference is statistically significant (t=2.54, df=66, p<0.05).
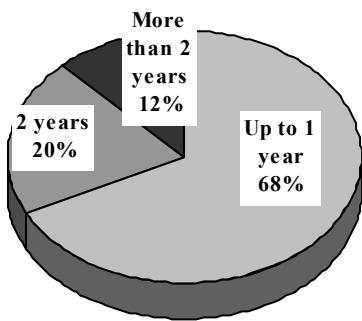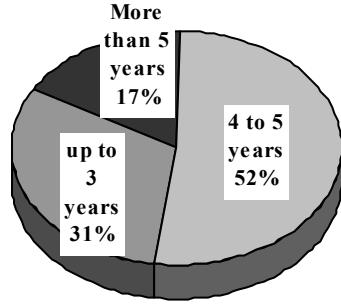
short-range plans   **long-range plans**

* The corresponding percentages refer to the number of valid responses

Figure 10. Percentage distribution of the number of years covered by short-range and long-range plans.

Questionnaire Item H

According to the findings (see Figure 11), twenty-four (34.3%) of the responding university sports organizations have been engaged in long-range planning for approximately three years; twenty-seven (38.6%) have been engaged between four to ten years; and nineteen (27.1%) have established long-range plans for more than ten years. Twelve university sports organizations have not responded to this item. The mean value of years that the respondents have been engaged in long-range planning was 8.83±7.70 and 7.04±6.76 for strategic and non-strategic planners respectively. The difference was not statistically significant (t=0.998, df=65, p=0.322).
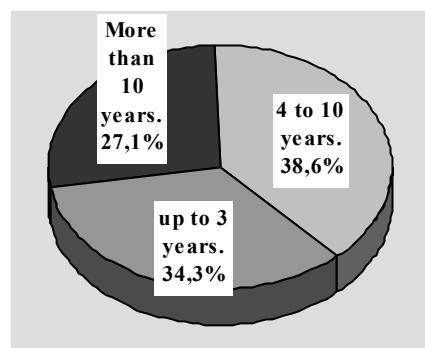
long-range planning
* The corresponding percentages refer to the number of valid responses

Figure 11. Percentage distribution of the number of years University Sports Organizations have been engaged in long-range planning.

Questionnaire Item I

The findings indicate the following: a) twenty-nine university sports organizations measure the performance of short-term plans quarterly, b) twenty organizations semi-annually, c) twenty-eight organizations annually, and d) sixteen organizations when a problem is evident (see Figure 12).

Of short-range plans, the odds ration (OR) of the frequencies that strategic planners conduct quarterly performance measurement, in comparison with non-strategic planners, is equal to 3.28 with 95% CI (95% confidence intervals) 8.695-1.239. This is statistically significant. Also, the odds ration (OR) of the frequencies that non-strategic planners conduct performance measurement when a problem is evident, in comparison with strategic planners, is equal to 5.056 with 95% CI 1.057-24.182 (see Table 12).
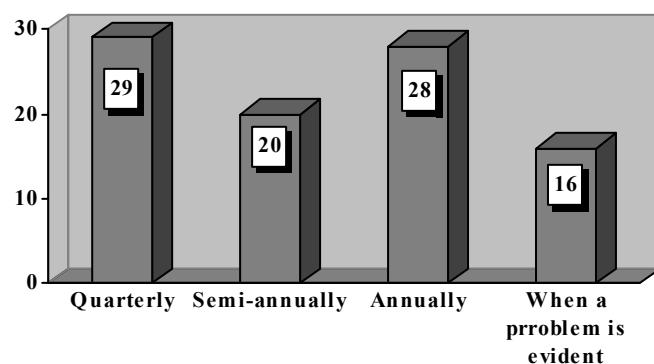
*a percentage of 15.9 indicated more than one items

Figure 12. Performance measurement relative to short-range plans.

Table 12.Comparison of performance measurement for the short-range plans, by strategic and non-strategic planners

Item	Description	Strategic planners		OR	95% CI
		Yes	No		
1.	Never	0	0	-	-
2.	Daily	0 (0%)	1 (2.0%)	-	-
3.	Quarterly	15 (53.6%)	13 (26.0%)	0.305	0.115-0.807*
4.	Semi-annually	9 (32.1%)	11 (22.0%)	0.595	0.211-1.681
5.	Annually	7 (25.0%)	19 (38.0%)	1.839	0.657-5.143
6.	When a problem is evident	2 (7.1%)	14 (28.0%)	5.056	1.057-24.182*
7.	Other	1 (3.6%)	3 (6.0%)	1.723	0.171-17.399

Questionnaire Item J

Results reveal the following: a) forty-seven organizations measure the performance of long-range strategies annually, b) twelve biennially, c) eleven semi-annually, d) nine when a problem is evident, and e) four organizations never evaluate their plans (see Figure 13).

No statistically significant difference was found, regarding the performance measurement for the long-range plans, by strategic and non-strategic planners
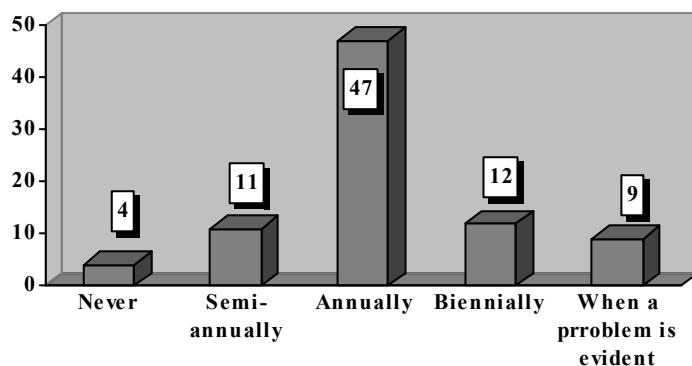
*a percentage of 4.9 indicated more than one items

Figure 13. Performance measurement relative to long-range plans.

Questionnaire Item K

The findings show (see Figure 14) that only 31 organizations (37.8%) have a formal planning committee.
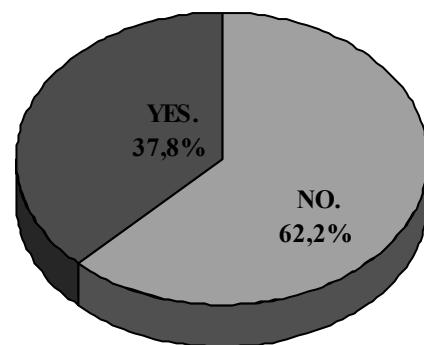
Figure 14. Existence of a Formal Planning Committee in University Sports Organizations

Questionnaire Item L

  The data displayed in Figure 15 reveal that among the 51 university sports organizations that do not have a formal committee, 28 stated that they plan to establish one within the next two years.
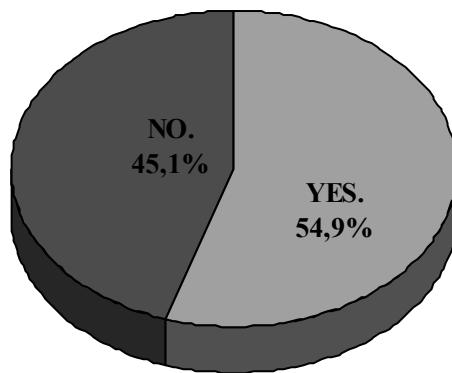
Figure 15. Establish a Planning Committee within the next two years.

4.3. *Research Question Two*

  What are the key factors that discourage University Sports Organizations members of F.I.S.U. from engaging in strategic planning activities?

Questionnaire Item D

  In question D the participants were asked to indicate the extent that each of the 11 factors discourages planning in their organizations. Table 13 depicts the means and standard deviations of the scores of the 11 items included in question D. The items are shown in descending order of the means. The repeated measures analysis of variance revealed that there are significant differences between the mean values of the items ($F_{10,730}$=14.1, p<0.001).

  An alternative way to present and analyze the data is to show, either in absolute and/or in percentage form, the number of organizations that consider each factor which discourages planning in their organizations to a "great" or "very great" extent. Insufficient financial resources are the major factor that discourages planning, since the proportion of organizations which stated that they consider this factor to a "great" or 'very great" extent was 71.6%. Second in order of importance are the inadequate facilities of universities (50.6%). In addition, factors that discourage form engaging in strategic planning to a "great" or "very great" extent by a percentage less than 25

percent were: a) lack of adequate communication / collaboration within the organization (22%), b) planning is not valued by organization's Board members (21%), c) lack of planning policy (20.3%) and d) resistance to planning by the staff (19.5%). There were no items that discourage university sports organizations to a "little" or "very little" extent form engaging in strategic planning by more than 70 percent. The results of this analysis are shown in Figure 16.

Table 13. Factors that Discourage Strategic Planning in University Sports Organizations

Item	Description	Mean	SD
6	Insufficient financial resources	3.84	1.31
7	Inadequate facilities of universities	3.38	1.38
8	Conflict between athletic and academic time schedule	3.18	1.34
5	Insufficient time	3.00	1.29
2	Lack of adequate communication / collaboration within the organization.	2.76	1.19
3	Lack of adequate communication / collaboration between organization and F.I.S.U.	2.76	1.37
1	Insufficient training and experience in planning procedures	2.70	1.21
9	Lack of a planning policy	2.59	1.19
11	Organizational culture gap between F.I.S.U. and organization	2.59	1.37
4	Resistance to planning by the staff	2.50	1.30
10	Planning is not valued by organization's Board members	2.49	1.34
Note: Means and standard deviations of the scores of the 11 items included in question D. The items are shown in descending order of the means. ($F_{10,730}$=14.1, p<0.001)			

"Great" or "Very Great" extent	"Little" or "Very Little" extent
Results are shown in descending order	Results are shown in ascending order
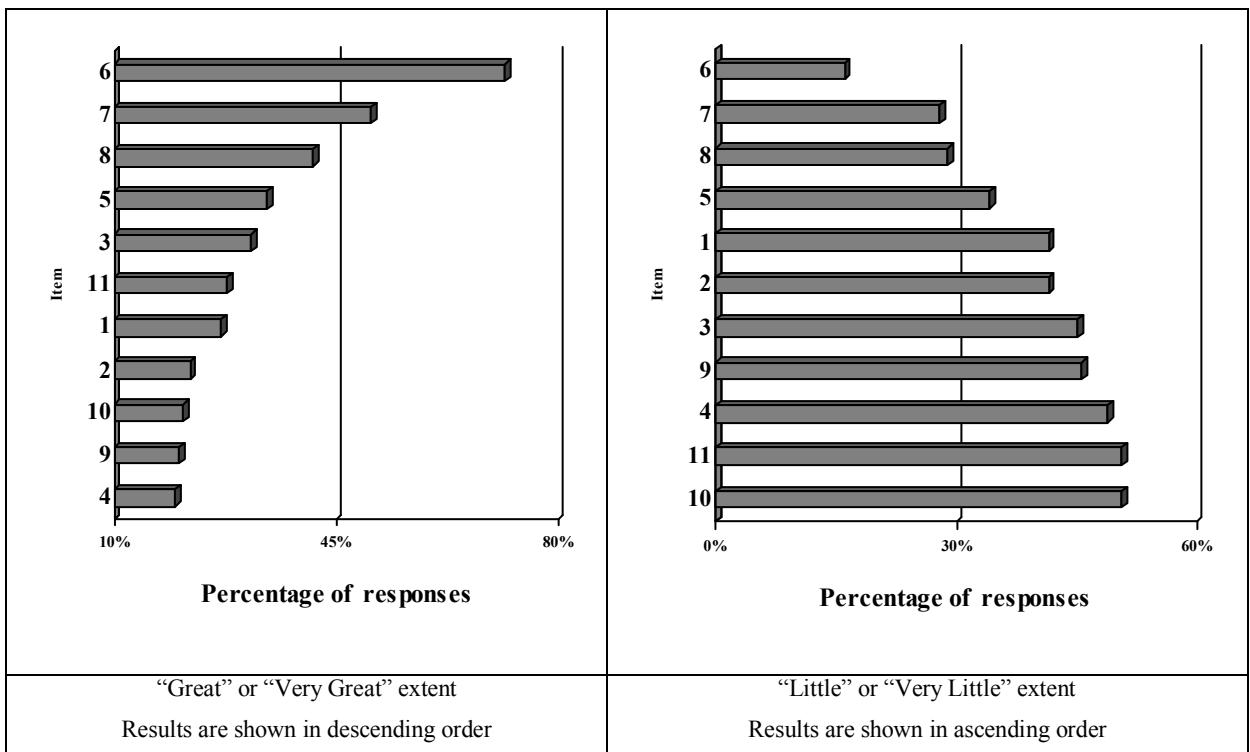
*Scaling: 1=Very Little 2=Little 3=Some 4=Great 5=Very Great

Figure 16. Extent to which factors discourage strategic planning

The 11 items of question D were subjected to factor analysis using the principal components' approach with a subsequent varimax rotation of the extracted components. Both the Bartlett's test of sphericity ($\chi 2$=463.2, d.f.=55, p<0.01) and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (0.859) indicate that a factor analysis is appropriate. Factor analysis yielded three components (factors) with an eigenvalue greater than one that explain 72.9% of the total variability (see Table 14).

Table 14. Factors that Discourage Strategic Planning in University Sports Organizations (latent variables)

Item	Component		
	1	2	3
D10	0.856		
D9	0.810		
D4	0.721		
D11	0.717		
D8	0.553		
D1		0.874	
D2		0.829	
D3		0.578	
D6			0.901
D7			0.808
D5			0.550
Eigenvalue	3.4	2.4	2.2
Variance explained	31.3%	21.5%	20.1%
Cronbach's alpha	0.879	0.810	0.752

Note: Loadings of the original 11 variables on the three extracted and rotated factors in question D, eigenvalues, variance explained by the components and internal consistency (Cronbach's alpha) of the items. ($\chi2=463.2$, d.f.=55, $p<0.01$)

4. 4. *Research Question Three*

What is the level of satisfaction of University Sports Organizations' members of International University Sports Federation (F.I.S.U.) in relation to predetermine performance indicators?

Questionnaire Item

In question W the participants were asked to indicate the level of satisfaction for their organizations' output in 14 factors. Table 15 depicts the means and standard deviations of the scores of the 14 items included in question W. The repeated measures ANOVA showed that the mean values of the responses are not equal ($F_{13,923}=10.1$, $p<0.01$).

An alternative way to present and analyze the data is to show, either in absolute and/or in percentage form, the number of participants, whose level of satisfaction for

each specific factor is "great" or "very great". There were no items with which a percentage greater than 70 percent of university sports organizations was satisfied to a "great" or "very great extent". The two factors that outweigh all the other factors were athletic performance (62.8%) and staff performance (58.8%). Financial performance and adequacy of facilities are the two factors with which the organizations are not greatly satisfied, since the proportion of organizations which stated that they are satisfied to a "great" or "very great" extent with these factors was only 23.0% and 29.5% respectively. There were no items with which a percentage greater than 70 percent of the organizations was satisfied to a "little" or "very little" extent. Attendance of students participating in the international competitions and meetings (39.2%) and financial performance (38.8%) are the two main factors that university sports organizations reported to be satisfied with to a "little" or "very little" extent. The results of this analysis are shown in Figure 17.

Table 15. Level of Satisfaction of University Sports Organizations' Output

Item	Description	Mean	SD
4	Athletic performance	3.69	0.82
3	Staff performance	3.68	0.90
14	Consistency in social responsibility	3.61	0.93
8	Communication with the F.I.S.U. members	3.57	1.14
2	Staff abilities and skills	3.57	1.04
5	Technical delegates'(e.g. coaches', competition officials') performance	3.56	0.73
12	Organizational culture open to new ideas	3.54	1.02
13	Organizational sustainability and flexibility	3.42	1.00
11	Creativity and innovation of staff	3.39	0.91
10	Quality of services delivered	3.32	0.96
6	Number of student participating in competitions of your organization	3.29	0.94
7	Attendance of students participating in the international competitions and meetings	2.94	1.17
9	Adequacy of facilities	2.92	1.07
1	Financial performance	2.81	1.19
Note: Means and standard deviations of the scores of the 14 items included in question W. The items are shown in descending order of the means. ($F_{13,923}$=10.1, $p<0.01$)			

"Great" or "Very Great" extent	"Little" or "Very Little" extent
Results are shown in descending order	Results are shown in ascending order
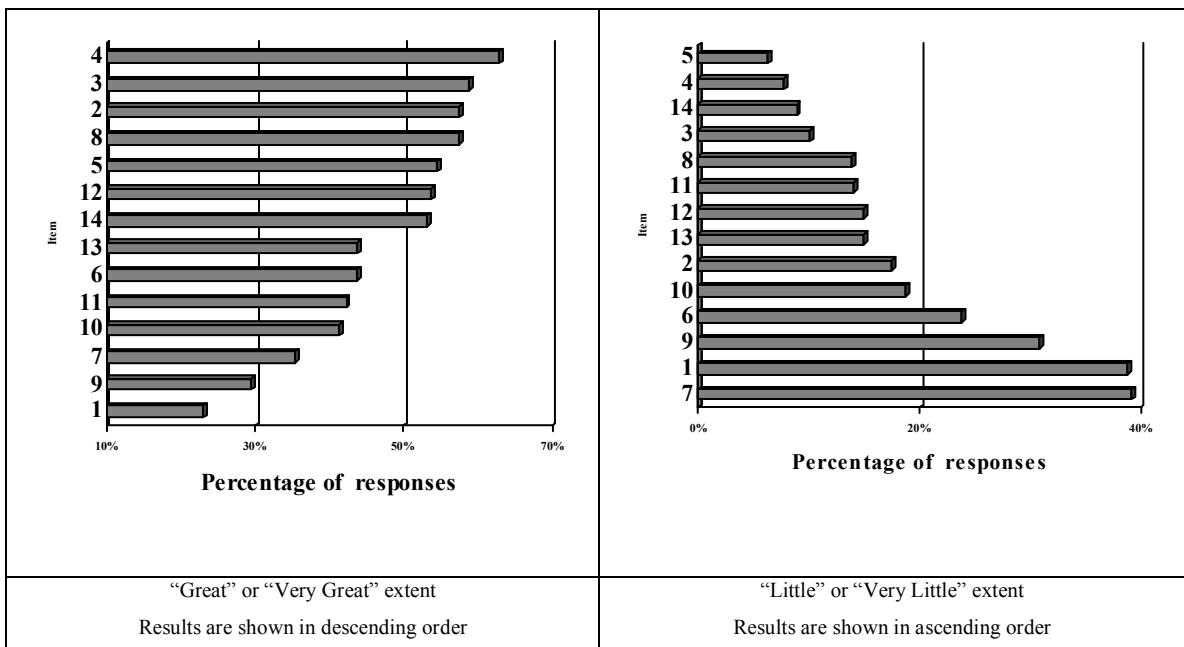
*Scaling: 1=Very Little 2=Little 3=Some 4=Great 5=Very Great

Figure 17. Extent to which, organizations are satisfied by their output.

The 14 items of question W were subjected to factor analysis using the principal components' approach with a subsequent varimax rotation of the extracted components. Both the Bartlett's test of sphericity ($\chi 2$=569.1, d.f.=91, p<0.01) and Kaiser-Meyer-Olkin (KMO) measure of sampling adequacy (0.836) indicate that a factor analysis is appropriate. Factor analysis yielded four components (factors) with an eigenvalue greater than one that explain 71.3% of the total variability (see Table 16).

Table 16. Level of Satisfaction of University Sports Organizations' Output (latent variables)

Item	Component			
	1	2	3	4
W3	0.852			
W2	0.796			
W11	0.764			
W14		0.877		
W12		0.817		
W13		0.815		
W1			0.784	
W6			0.762	
W9			0.666	
W10			0.554	
W7	0.458		0.476	0.475
W5				0.706
W8				0.695
W4				0.644
Eigenvalue	**2.88**	**2.81**	**2.38**	**1.90**
Variance explained	**20.6%**	**20.1%**	**17.0%**	**13.6%**
Cronbach's alpha	**0.885**	**0.893**	**0.811**	**0.585**

Note: Loadings of the original 14 variables on the four extracted and rotated factors in question W, eigenvalues, variance explained by the components and internal consistency (Cronbach's alpha) of the items. ($\chi 2$=569.1, d.f.=91, p<0.01)

4.5. *Research Question Four*

Is it possible to develop a generic strategic planning model, which can be implemented by University Sports Organizations members of F.I.S.U.?

A generic strategic planning process model has been developed in response to the findings of the research and the related literature (Figure 18). An analysis of several

steps involved in the strategic planning process follows. (Chapter II presented an in-depth discussion of the major components of the strategic planning process).

Strategic Planning Process Model

Strategy formulation

1. Whether university sports organizations have been identified as strategic planners or non-strategic planners and whether they have great experience on strategic planning issues or they are developing a new organization, the vision and philosophy must be clearly determined and fully agreed in the organizations. The vision and philosophy should be fully agreed by all the official members of F.I.S.U. The organizational culture must be communicated and be dispersed within each organization, followed by a value statement, which will reflect the unique culture of each country. A shared mission, and long-term goals and objectives should be accepted and defined to achieve organization's purpose of existence. When establishing long-term goals, organizations must determine and include those long-term objectives that will ensure sustainability i.e. plans should be developed focusing on the achievement of long-term critical success goals (L.C.S.G.).

2. An ongoing evaluation of whether the organization's general purpose is achievable is needed. University sports organizations need to identify the factors that actually constrain their course of actions. An insight to the organization's statutes and an in-depth analysis of the external environment by which it is affected or/and needs to cooperate with, may be useful to identify opportunities for improvements. A policy statement agreed and understood by all members of the organization is required. Training and education, continuous improvement, quality service delivered and collaborations are some issues that a policy statement can regulate.

3. Given the social, educational, demographic, political, legal, economic/tax, and technological changes in the external environment, organizations need to assess the existing opportunities and threats. External benchmarking may be useful to identify best practices and ways to shift threats to challenges. An in-depth insight of an organization's core competencies, capabilities, and weaknesses may comprise the basis for the selection of the appropriate planning

activities for the organization. Quality techniques may prove beneficial to surpass effectively both threats and weaknesses.

4.   An organization needs to agree on whether its mission and objectives are achievable. It is imperative to define the key performance indicators (KPIs) aligned with the critical factors for success (CSFs), in order to continually evaluate the organization's progress. Core processes must be clearly defined in order to achieve each CSF. The appropriate performance measurement system must be developed which should include specific measures, standards and performance objectives.

5.   Since a university sports organization has established its long-term objectives, the selection of long-term strategies and priorities is required in order to achieve these objectives.

Strategy Implementation

The next step is to establish and develop the short- and mid-term objectives, priorities and strategies to achieve long-term objectives and strategies.

Strategy Evaluation

The final step in the strategic planning process is the strategy evaluation of the objectives and strategies undertaken. In this step an organization should monitor the actual performance and determine whether the organization met the objectives, priorities, and standards. All members of an organization should be informed about the organization's performance. It is important to identify both requirements and opportunities for improvement.

Figure 18. Strategic Planning Process Model for University Sports Organizations

F E E D B A C K

VISION
PHILOSOPHY
     CULTURE
     VALUES

SHARED MISSION
LONG-TERM GOALS AND OBJECTIVES

L.C.S.G.

POLICIES

REVIEW/RECONSIDER
     MISSION
     LONG-TERM STRATEGIES

IDENTIFY CONSTRAINING FACTORS
     EXTERNAL ENVIRONMENT
     STATUTES

DEFINE OPPORTUNITIES FOR IMPROVEMENT

INTERNAL BENCHMARKING

EXTERNAL BENCHMARKING

CORE COMPETENCIES
CAPABILITIES

WEAKNESSES

THREATS

OPPORTUNITIES

DEVELOP SHORT AND MID-TERM STRATEGIES AND PRIORITIES

ESTABLISH SHORT AND MID-TERM OBJECTIVES AND PRIORITIES

DEFINE PRIORITIES FOR EACH STRATEGY

SELECTION OF LONG-TERM STRATEGIES

CSFs
CORE PROCESSES
KPIs
IDENTIFY THE APPROPRIATE MEASUREMENT SYSTEM

PERFORMANCE

MEASUREMENT

AND

EVALUATION

SECONDARY ANALYSIS OF REAL-CAUSES

ANALYTICAL PROBLEM SOLUTION

CHALLENGES

TRAINING / EDUCATION / IMPROVEMENT

INNOVATION AND CREATIVITY

4.6. *Hypotheses Tested*

1. The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the organizations' model of governance (public vs. private vs. cooperative).

Table 17. The Extent of Strategic Planning used by University Sports Organization and their Model of Governance

E * S Crosstabulation

			S				Total
			1	2	3	4	
E	1	Count	15	5	3	5	28
		% within E	53,6%	17,9%	10,7%	17,9%	100,0%
	2	Count	20	9	6	4	39
		% within E	51,3%	23,1%	15,4%	10,3%	100,0%
	3	Count	5	2	1	0	8
		% within E	62,5%	25,0%	12,5%	,0%	100,0%
	4	Count	2	1	0	0	3
		% within E	66,7%	33,3%	,0%	,0%	100,0%
Total		Count	42	17	10	9	78
		% within E	53,8%	21,8%	12,8%	11,5%	100,0%

Chi-Square Tests

	Value	df	Asymp. Sig. (2-sided)
Pearson Chi-Square	**3,676[a]**	**9**	**,931**
Likelihood Ratio	5,160	9	,820
Linear-by-Linear Association	1,435	1	,231
N of Valid Cases	78		

a. 11 cells (68.8%) have expected count less than 5. The minimum expected count is .35. (

The data was analyzed by using Chi-square. The results indicated that the university sports organizations' model of governance is independent of the extent to which strategic planning used by University Sports Organizations (see Table 17).

For the descriptive part of questionnaire item S, see Figure 19.
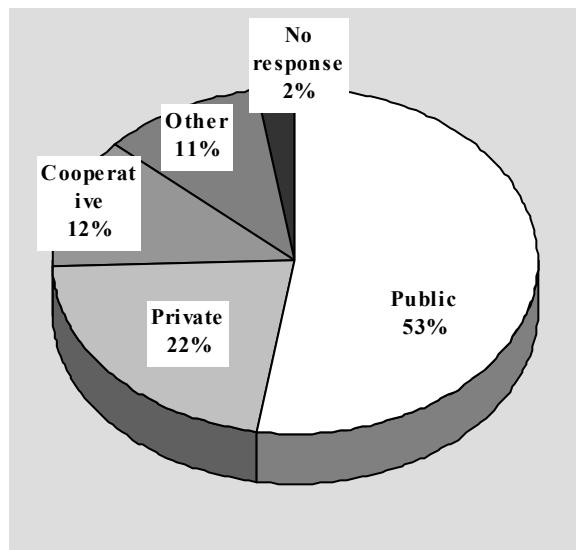
Figure 19. Percentage of University Sports Organizations' Model of Governance.

2. The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of students participating in competitions of the university sports organizations to the total number of students engaged in sport activities in higher education.

The Anova analysis showed that the two variables were not significantly related (see Table 18).

Table 18. The extent to which Strategic Planning used by University Sports Organizations and the ratio of the questionnaire items "U" to "T"

Descriptives

rat2009=U/T

E	N	Mean	SD	Std. Error	95% Confidence Interval for Mean		Minimum	Maximum
					Lower Bound	Upper Bound		
1	19	,4335	,40983	,09402	,2359	,6310	,01	1,00
2	29	,3571	,32539	,06042	,2333	,4809	,01	1,00
3	5	,4068	,44518	,19909	-,1459	,9596	,04	1,00
4	2	,1750	,10607	,07500	-,7780	1,1280	,10	,25
Total	55	,3814	,35872	,04837	,2844	,4783	,01	1,00

ANOVA

rat2009

	Sum of Squares	df	Mean Square	F	Sig.
Between Groups	,157	3	,052	,393	,758
Within Groups	6,792	51	,133		
Total	6,949	54			

*the analysis refers to the fiscal year 2009

For the descriptive part of this item see Figure 20.
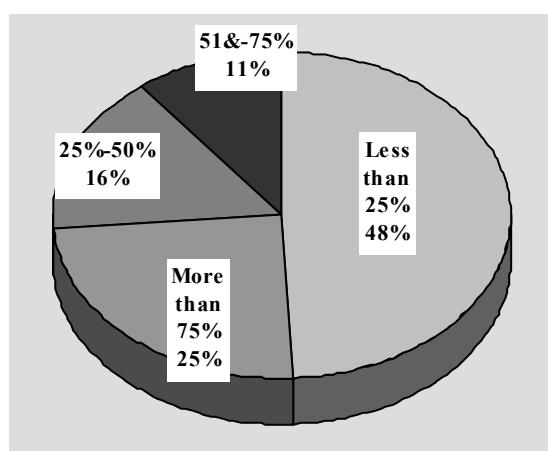
year 2009

Figure 20. Percentage distribution of the ratio of the questionnaire items "U" to "T"

3. The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of the university sports organizations' self-generated revenues as opposed to state funds.

Table 19. The extent of strategic planning used by University Sports Organizations and the percentage of self-generated revenues as opposed to state funds

Self-generated revenues in fiscal year 2009	Level of planning				
	Structured strategic	Structured operational	Intuitive	Unstructured	Total
None or missing	13	9	5	2	29
	44,8%	31,0%	17,2%	6,9%	100,0%
1%-25%	7	16	2	1	26
	26,9%	61,5%	7,7%	3,8%	100,0%
26%-25%	5	6	1	0	12
	41,7%	50,0%	8,3%	,0%	100,0%
>50%	4	8	0	0	12
	33,3%	66,7%	,0%	,0%	100,0%
Total	29	39	8	3	79
	36,7%	49,4%	10,1%	3,8%	100,0%

Chi-Square Tests

	Value	Df	Asymp. Sig. (2-sided)
Pearson Chi-Square	**9,300**[a]	**9**	**,410**
Likelihood Ratio	11,250	9	,259
Linear-by-Linear Association	,851	1	,356
N of Valid Cases	79		

a. 10 cells (62.5%) have expected count less than 5. The minimum expected count is .46.

* 17 missing values (20.7%).

The results demonstrated that there was no significant relationship between the extent of strategic planning used by university sports organizations and the percentage of the organizations' self-generated revenues as opposed to state funds (see Table 19).

For the descriptive part of the questionnaire item M2009 see Figure 21.
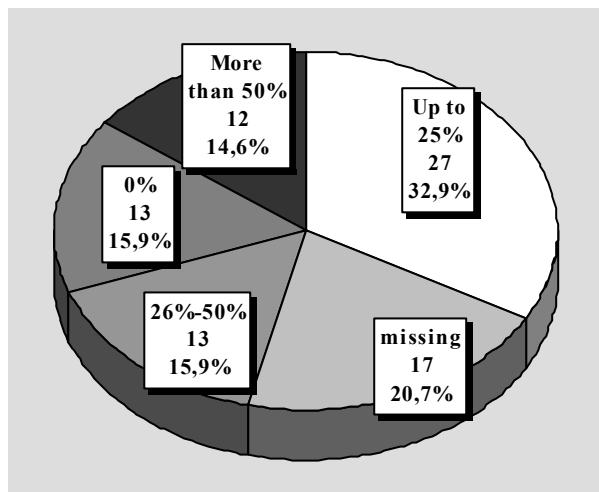
Figure 21. Self-generated revenues as opposed to state-funds.

missing values=17 (20.7%)
valid=65
Std.Dev.=29,365
mean=27,32

V. SUMMARY, DISCUSSION, IMPLICATIONS AND RECOMMENDATIONS

The summary, a discussion and implications of the study, as well as recommendations for further study are presented in Chapter V.

5.1. *Summary of the Study*

The primary purposes of this study were: a) to determine the extent to which the strategic planning process is being used in University Sports Organizations (members of F.I.S.U).; b) to identify the key factors that discourage University Sport Organizations (members of F.I.S.U.) from engaging in strategic planning activities; c) to determine the level of satisfaction of University Sports Organizations (members of F.I.S.U) in relation to predetermine performance indicators; d) to develop and recommend a generic strategic planning process model, which can be implemented by University Sports Organizations (members of F.I.S.U.); and e) to examine the relationship between the extent of strategic planning used by University Sports Organizations (members of F.I.S.U) and these selected variables: (1) the organizations' model of governance (public vs. private vs. cooperative); (2) the percentage of students participating in competitions of the University Sports Organizations to the total number of students engaged in sport activities in higher education; and (3) the percentage of the University Sports Organizations' self-generated revenues as opposed to state funds.

The research questions to be examined were as follows:

1. What is the extent to which the strategic planning process is being used in University Sports Organizations (members of F.I.S.U.)?

2. What are the key factors that discourage University Sports Organizations (members of F.I.S.U.) from engaging in strategic planning activities?

3. What is the level of satisfaction of University Sports Organizations (members of F.I.S.U.) in relation to predetermine performance indicators?

4.   Is it possible to develop a generic strategic planning process model, which can be implemented by University Sports Organizations (members of F.I.S.U.)?

The following hypotheses were tested in this study:

1.   The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the organizations' model of governance (public vs. private vs. cooperative).

2.   The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of students participating in competitions of the University Sports Organizations to the total number of students engaged in sport activities in higher education.

3.   The extent of strategic planning used by University Sports Organizations (members of F.I.S.U.) is independent of the percentage of self-generated revenues as opposed to state funds.

A questionnaire designed by Thanos Kriemadis (1992) has undergone some modification for the requirements of this study. Since most of the questions are structured from multiple items answered in a typical Likert scale, factor analysis, followed by Cronbach's reliability analysis were employed in a pilot attempt to ascertain the multidimensionality of each construct and the internal consistency of the extracted factors.

This study was an endeavor to contribute to the management of University Sport Organizations by identifying strategic planning activities already undertaken. The strategic planning process may be useful to University Sports Organizations to: a) organize information obtained, b) systemize strategic thinking, c) structure decision making, d) objectively forecast forthcoming situations, e) plan every action thereby achieving prospective results, and f) eventually shift from the desirable sustainability to organizational excellence.

All 153 University Sport Organizations were surveyed. A total of 82 (53.6%) of responses were collected.

The findings of this study were as follows:

1.   Twenty-nine (36.7 percent) of those University Sport Organizations responding were classified as strategic planners, while fifty (63.3 percent) have not met the criteria necessary to be classified as strategic planners (non-strategic planners).

2.   More than 90% of the organizations incorporate into their current planning process the majority of relevant activities. The only activity that is integrated in the current planning process by a significantly smaller proportion of organizations (80.5%) is the one associated with developing long-range plans (or strategies) to achieve the organization's mission and objectives. Additionally, only 3.4 percent of strategic planners do not develop long-range plans.

3.   The external factors that bear the most weight in the formulation of the organizations' plans are N.U.S.F. policies and future trends (72%), educational trends (72%) and higher education's policy and strategy (71%). Conversely factors, such as entertainment industry, parents of the student-athletes and religious groups are considered to a very small extent (less than 25%).

4.   Student participation in sport activities greatly outweighs all the other internal factors taken into account in the formulation of the organizations' plans, since the proportion of organizations which stated that they consider this factor to a "great" or "very great" extent was 89%. Other factors that were appreciated to a "very great" or "great" extent by 70 percent or more of the responding University Sports Organizations when formulating their plans were: a) organizational excellence i.e. quality, effectiveness and efficiency of the organization (80.5%), b) athletic performance excellence (78%), c) technical delegates' (i.e. coaches', competition officials') opinion (73.2%), d) financial performance (72.2%), and e) creativity and innovation i.e. new ideas, empowerment and involvement of the staff (72%). Conversely, marketing processes (informational, programming and control systems) bear a minimal weight as an internal factor (40.2%), followed by advisory committees (46.9%).

5.   Financial and Event Management plans are the two items that are incorporated to a greater extent than all the other plans. In addition this study reveals that long – range plans and strategies are significantly related with the following plans: a) quality management plan; b) contingency plan; and c) marketing plan. Furthermore, regarding strategic planners and non-strategic planners, statistically significant differences are found in event management, quality management, marketing (and contingency plans. The greatest proportional difference between strategic and non-strategic planners was found to be the incorporation of quality management plan.

6.   When it comes to the performance measurement of short-range plans, the possibility of conducting quarterly performance measurement by strategic planners is greater than that of non-strategic planners. Also, the possibility of conducting

performance measurement when a problem is evident by non-strategic planners is greater than that of strategic planners.

7.   Insufficient financial resources are considered the major factor that discourages planning, since the proportion of organizations that stated that they regard this factor to a "great" or "very great" extent was 71.6%. Second in order of importance are the inadequate facilities of universities (50.6%).

8.   The percentage of University Sports Organizations satisfied with athletic performance and staff performance was 62.8% and 58.8% respectively. No percentage higher than these figures was achieved for any other factor. The factors for which the organizations are the least satisfied are: a) financial performance, and b) adequacy of facilities.

9.   A strategic planning model was constructed for implementation by University Sport Organizations, and a presentation was made, analysing its several components.

10. The extent of strategic planning used by University Sports Organizations members of F.I.S.U. was not significantly related to a) the organizations' model of governance, b) the percentage of students participating in competitions of the University Sports Organizations to the total number of students engaged in sport activities in higher education, and c) the percentage of the University Sports Organizations' self-generated revenues as opposed to state funds.

5.2. *Discussion*

More than 90 percent of the organizations indicated that they have integrated in their planning process, activities such as vision, mission, goals and objectives, short-term strategies, and evaluation procedures. The only activity that is integrated in the one associated with developing long-range plans (or strategies) to achieve the organization's mission and objectives. However, only 36.7 percent of University Sports Organizations reported that they developed structured strategic plans while a percentage of 49.5 deployed structured operational plans. The organizations that engaged in the development of structured strategic plans may be classified as strategic planners since they met the criteria of: a) having developed formalized written, long-range plans; b) having assessed the internal and external environment; c) having developed strategies to meet organization's mission and objectives; and d) evaluating past, current, and future performance. The related literature supports this position, identifying that the "written

and unwritten plans" are factors which can be used as performance indicators of formality (O'Regan & Ghobadian, 2007). More specifically, Kriemadis (1992, 1997, 2009) supports that an evaluation of the extent to which strategic planning is adopted may be useful, in order to classify the athletic departments as "strategic planners" or "non-strategic planners". Several authors claim that formal written strategic plan may achieve better results (Mintzberg, 2000; Kraus et al., 2006; O'Regan & Ghobadian, 2007; Ghobadian et al., 2008; Kaplan & Norton, 2008b). Kaplan and Norton (2008b), in particular, state that an organization that has a system of formal strategy execution may result in a success rate three times greater. In general, "a higher degree of formalization is related to a higher degree of performance" (Kraus et al., 2006, p.341). Specifically, O'Regan and Ghobadian (2007) concluded that: a) in formal strategic planning, greater emphasis placed on the competitive position and trends than in non-formal planning firms, b) formal planning firms place greater emphasis on obtaining the relevant and adequate information available in comparison to non-formal planning firms, c) formal planning firms place greater emphasis on the use of analytical assessment techniques than non-formal planning firms, who base their assessment techniques more on instinct, d) formal strategic planning firms are more aware of the need for staff creativity for the achievement of greater competitive advantage, and e) formal planning firms stress the need for reviewing activities and using the monitoring processes to achieve this.

A strategic planning process is based on the assessment of the internal and external environment (e.g. De Witt & Meyer, 2004; J.M.Bryson & Alston, 2005; Wilson & Gilligan, 2005; Dincer et al., 2006; Black et al., 2007; Kaplan & Norton, 2008;Keller, 2008; Linn, 2008; Porter, 2008;Vila & Canales, 2008; Valkano et al. 2009); and development of long-range strategies to meet the mission, the goals and objectives (e.g. Allison & Kaye, 2005; J.M.Bryson & Alston, 2005; Dincer et al., 2006; O'Regan & Ghobadian, 2007). Linn (2008) points out that it would be insufficient to create a strategy without taking into account the organizations' strengths and weaknesses, as well as the opportunities and threats. More specifically, many organizations fail to link their strengths and weaknesses to key success factors and to recognize and clearly comprehend competitors' capabilities. Also they do not develop strategies to convert the weaknesses into strengths and the threats into opportunities (Wilson & Gilligan, 2005). Vila and Canales (2008) indicate that the shift from a limited environmental analysis and a strict set of action plans to a more comprehensive

approach resulted in a strategy conceived as a shared framework enabling the organization to realize its desired future uninhibited by its current position.

Consequently, a majority of University Sports Organizations (63.3 percent) was identified as non-strategic planners. Even though they had developed some plans and actions they were excluded because their planning efforts were classified to one of the following categories: a) they had developed written, short-range operational budgets and plans of action for the current fiscal period; b) they had developed and implemented informal short-range plans based on intuition and previous experience; or c) they had not been involved in any measurable structured planning procedure (Kriemadis, 1992; 1997, 2009).

According to Kriemadis (1992, 1997) the first two categories above may be classified as "short-range planners"; and "intuitive planners" respectively. Recent literature indicates that the establishment of short-range objectives and the development of short-range strategies are imperative to support the success of long-term objectives and strategies. In particular, short- and mid- range strategies linked with long-range strategies may ensure that an organization responds effectively to the strategic issues (J.M.Bryson & Alston, 2005; Allison & Kaye, 2005; Wilson & Gilligan, 2005; Dincer et al., 2006; Kaplan & Norton, 2008; Plant, 2009). Consequently, non-strategic planners should realize that the benefits arising through the establishment of long-range strategies are inextricably related to the organizations' success in the long run. Moreover, when establishing long-term goals, organizations must determine and include those long-term objectives that will ensure sustainability i.e. plans should be developed focusing on the achievement of long-term critical success goals. If University Sports Organizations are to be effective and viable, they must be accountable and efficient. Their plans should be based on substantive environmental analysis and predetermined performance assessment. Decision making needs to be incorporated in a systemic framework, in which the creative flow of new ideas concerning future actions involves structured procedures. Therefore, although creativity is an integral part of strategic planning (Van Woerkum et al., 2007) it should not be confused with empirical and intuitive decision making. The development of unwritten plans following a short-oriented perspective does not appear to be achievable, measurable, and effective. Above all, it is unlikely to direct an organization to a sustainable future.

According to Poister and Streib (2005) a strategic planning process derives benefits only if it is implemented. It seems essential to examine the findings arising in this study associated with the implementation stage of a strategic planning process:

1.   Marketing processes such as informational, programming and control systems (short-range plans) bear minimal weight as an internal factor (40.2%) when the University Sports Organizations formulate their planning activities. In addition marketing plans are incorporated as the lowest priority (24.7 percent) in the organizations' plans. Also, long-range plans are ranked significantly lower than other factors when formulating plans. Since the results demonstrate that marketing, contingency and quality plans are significantly related with the development of long-range plans (or strategies); it seems likely that a great proportion of University Sports Organizations do not acknowledge the benefits of "actually" implementing short-range strategies which are inextricably linked to long-range strategies.

This position is supported by the findings which reveal that the only short-term plans taken into account and utilized to a greater extent than all the other plans, are the Financial and the Event Management plan. Plans such as Quality management plan, Human Resources plan, Contingency plan, Facilities master plan, and Marketing plan are not acknowledged to a "great" or "very great" extent by the majority of University Sports Organizations. Recent literature indicates that short-range strategies should be developed to accomplish goals related to each operating and functional area of an organization (Allsion & Kaye, 2005; Kaplan & Norton, 2008). According to the findings of the study, quality management plans and contingency plans are significantly related to the development of long-range plans (strategies) which affects the actual implementation of a strategic planning process. The study also reveals that strategic planners incorporate in the planning process plans such as event management, marketing, contingency and quality management plans to a much greater degree than non-strategic planners. This is consistent with the literature which indicates that short-range plans are fundamental in order to promote the organization's overall strategy (Allsion & Kaye, 2005; Wilson & Gilligan, 2005; Ghobadian et al., 2008; Kaplan & Norton, 2008; Slack et al., 2009). However, the organization's performance is influenced by the consistency and interaction of all the functional strategies established (Rhee & Mehra, 2006). Human resources management, in particular, should be sufficiently considered (Kriemadis, 1997; Hoye et al., 2009; Barr., 2009); since the successful implementation of a strategic planning process relies on the capabilities and

skills of human resources (Kriemadis, 1997; Hoye et al., 2009). Still, the most significant finding is that quality management plans dominated the planning process of strategic planners. This supports current literature concerning the use of quality systems in the planning processes (e.g. Oakland, 2001; Acur, N. & Englyst, L., 2006; Al-Hawari & Ward, 2006; Davakos, 2006; Glaveli et al., 2006; Black et al., 2007; Srikanthan & Dalrymple, 2007; Porter, 2008). Oakland (2005) states that in order to be effective, an organization should establish quality systems.

2.   Twenty-two of the responding University Sports Organizations stated that they develop long-range plans within a three year perspective, thirty-seven cover between four and five years, while only twelve organizations cover more than five years. It should be noted that the results of this study reveal that strategic planners adopt a longer time frame when developing long-range plans than non-strategic planners. However, as mentioned above, long-range planning is incorporated to a lesser degree than other activities.

This study reveals that there seem to be differing opinions about the years the short-range plans should cover. A possible reason could be that these organizations are not familiar with the time horizon covering short- and long-range plans, or they are relatively new organizations.

O'Regan and Ghobadian (2007) claim that an organization following a time horizon less than three years may be classified as short-term oriented. Findings of their research indicate that short-term oriented organizations have failed to both specify goals and objectives and to recognize the resources necessary for the development of their strategic and functional plans. Harris and Ogbonna (2006) support that firms adopting long-term perspectives are more likely to initiate planning with a more comprehensive and profound understanding and are more likely to respond accurately and rapidly to long-term opportunities and threats. Still, strategic planning should be translated into annual operating plans with assumptions made about the future and which are monitored to ensure their validity within a changeable environment (Allison & Kaye, 2005).

University Sports Organizations must realize that they have to develop short-, mid-, and long-range plans. The findings of this study may lead to the following observations: a) short-range plans are needed to achieve and assess the progress of the organizations' long term goals and objectives, b) given the rapidly changing environment the University Sports Organizations act and collaborate, the short-range

plans should not cover more than one year, c) given that University Sports Organizations are so deeply associated with higher education institutions, mid-range plans are needed to develop strategies that will not take longer than the election cycle, d) contingency plans are needed in order to anticipate the impact of powerful shareholders and a rapidly changing external environment, e) to achieve the purpose of an organization's existence and translate the organization's future image into achievable, realizable and tenable plans, a long-term scope in the development of strategies is fundamental. Given the need for fundamental changes and sustainability, the long-term plans must cover a longer time frame. Accordingly, the organization's performance is influenced by the consistency and interaction of all the functional strategies established (Rhee & Mehra, 2006).

3.   University Sports Organizations appear to take into account performance measurement relative to short-range plans. This observation is supported to some degree by the findings that indicate that a significant percentage of the respondents consider financial and staff performance to a great extent. In particular, the majority of all respondents conduct quarterly or annual performance measurements in reference to short-range plans. However, for short-range plans, the possibility that strategic planners conduct quarterly performance measurement is approximately three times greater than non-strategic planners. In addition, the possibility that non-strategic planners conduct performance measurement when a problem is evident in comparison with strategic planners is approximately five times greater. These findings, may lead to the conclusion that non-strategic planners are more reactive than proactive. Furthermore, nearly half of the respondents undertake annual performance measurements in reference to long-range plans, while the remaining respondents follow different approaches.

There seem to be differing opinions concerning "when" or/and "why" to measure the performance of the plans. University Sports Organizations should establish specific measurement systems involving standards and objectives of short-, mid- and long-term strategies, priorities and actions; and use key performance indicators for each goal and objective. The organizations should identify the positive implications of strategy maps (Kaplan & Norton, 2008; Kaplan et al., 2008; J.M.Bryson et al., 2009) in order to provide sufficient feedback of each goal and objective and their progress. However, further research is needed to examine the performance measurement system that each University Sports Organization adopts.

Notwithstanding the above, it is recommended that, apart from evaluating performance on a regular basis, emphasis be given to a) daily evaluative feedback in order to assess time management; b) monthly evaluation concerning issues such as: "are time-based standards being achieved?" and "is staff meeting the necessary capabilities and abilities?"; c) quarterly evaluation to determine whether improvements have been implemented, whether there are new challenges or threats and emerging new goals; d) semi-annual evaluation to identify whether the standards have been properly set, the necessary resources are available, tangible resources are efficiently managed, staff has been provided with the necessary means and finally to decide on further action, if necessary, for the fulfilment of short-term goals.

4.   The study provided evidence that internal factors are more significant than the external factors when formulating planning activities. Although the organizations' internal environment must be considered, the organizations' external environment should be equally considered. A detailed and balanced environmental analysis may also be useful in order to: a) understand the critical requirements, b) determine how to achieve specific objectives and meet the requirements necessary, c) enhance the organization's strengths and exploit the upcoming opportunities, and d) identify how to transform the "disadvantages" to effective and efficient outcomes.

5.   This study reveals that external factors taken into account by the majority of University Sports Organizations (62 percent) when formulating their strategies are other Federations, Small and Medium enterprises (35 percent), and Entertainment industry (23 percent). However, University Sports Organizations should realize that when formulating a strategic planning process, a continual process of identifying and acknowledging best practices of several affiliated industries may benefit their own organization. Internal and external benchmarking can help organizations to: a) identify the organization's core competencies and capabilities, essential for the development of its strategy and direction; b) identify best practices of competitors, collaborators, and other businesses operating in the service and sport sector; c) obtain necessary information about both the organization's smooth operation as well as constraints and challenges in its environment; and e) collect and document new ideas involving full staff participation.

6.   The findings of this study indicate that student participation in sport activities outweighs the other factors in the formulation of the organizations' plans. However, the percentage distribution of the ratio number of students participating in competitions of

the organizations to the total number of students engaged in sport activities in higher education, in the year 2009, indicates that only 25 percent of the respondents involve more than 75 percent of higher education students in their competitions, while 48 percent state that they involve less that 25 percent. Accordingly, the level of satisfaction related to both the attendance of students participating in international competitions and meetings, and the number of student participating in competitions of University Sports Organizations appears to be very low, since only a small percentage of the respondents stated that they are satisfied to a "great" or "very great" extent. This may be attributed to the fact that University Sports Organizations may lack the necessary financial or other tangible resources i.e. facilities, means to offer programs. Another possible reason may be the insufficient attention which is given by higher education institutions to the athletic departments' human resources dimension and the willingness to commit the time required to fulfil such goals. Confirming the above, only 41.3 percent stated they were satisfied to a "great" or "very great' extent by the quality of services delivered. The study reveals that the low percentage of students participating in competitions of University Sports Organizations as opposed to students participating in sport activities in higher education is independent of the extent of strategic planning used by University Sports Organizations. Consequently, other factors may also affect the number of students involved in University Sports Organization competitions.

The academic schedule is considered to be an internal factor when formulating planning activities by a percentage of 65.9 of University Sports Organizations. In addition, the third factor that discourages organizations from engaging in strategic planning is conflict between athletic and academic schedule (41.3 percent) followed by insufficient time (34.1). Although the percentages are not significantly high, these factors have been ranked as a priority which may also be significant for students not participating in University Sports Organizations competitions. In addition, other factors may affect the participation of the students in the university sports competitions, such as a) financial constraints, b) lack of the required communication between University Sports Organizations and higher education institutions' athletic departments, c) conflict between University Sports Organizations' schedule and other national/international competitions' schedule.

7.   Based on the fact that insufficient financial resources and inadequate facilities are the most important factors that discourage planning, organizations should acknowledge management techniques which help to identify the secondary causes of

the problem. Weaknesses may be turned into opportunities, mapping out decisions and actions necessary. Accordingly, Kaplan and Norton (2007) emphasize that management systems, may enable the management to assess the progress of the organization's strategy and specify cause-and-effect relationships throughout the strategy implementation process. This will ensure that the financial objectives and budgeting will support the overall strategic goals. Until recently the literature was divided over the relationship between strategic planning and financial performance (Kriemadis, 1992). At present there have been several research studies in this area. Kaplan and Norton (2008) state that throughout strategy formulation, managers decide on a course of action that will create a sustainable competitive advantage, and that in turn will lead to superior financial performance. In addition, several methods, management systems and tools utilized in a strategic planning process appear to lead to sustaining long-term finance (J.M. Bryson et al., 2009), to achieve better financial results (Kaplan & Norton, 2007) or to better estimate financial results (Contrada, 2009). Strategic planning may affect an organization's economic success through a systemic decision making process (Gavetti et al., 2005). It may increase organization's effectiveness and efficiency, in this way better results are achieved consuming fewer resources (J.M.Bryson & Alston, 2005).

The findings of this study reveal that these factors which provide the least satisfaction are also the factors that discourage planning. According to J.M.Bryson and Alston (2005), for an effective implementation of the strategic planning process, adequate funding and other resources are required to create value for the organization, and its stakeholders. Accordingly, other research studies conducted in the field of strategic planning indicate that the major factor that discourages the use of strategic planning is insufficient financial resources (Kriemadis, 1997; 2009). In addition, recent literature indicates that available financial resources have become extremely constrained (Watt et al., 2007). Therefore, the strategic planning process must become a high priority for the administration, in order to both promote and provide financial support (Watt et al., 2007). Moreover, an organization should identify allocations and resources required to support selected strategies and develop procedures for anticipating the status of the firm on a continual basis as well as analyzing the immediate environment of the firm (O'Regan & Ghobadian, 2007). Therefore, it can be assumed that strategic planning can uncover the underlying reasons for the existence of constraining factors and illustrate the means, the motive and knowledge needed to

achieve better results. Zumeta (2008) argues that as long as efficiency is improved and accountability for outcomes is provided increased investments will be forthcoming. Therefore it seems that University Sports Organizations, before formulating a strategic planning process, must assess the opportunities and challenges which may arise from the collaboration with governmental authorities and higher education institutions, as well as the higher education institutions' philosophy, policies, and commitment to a common purpose.

8.   Insufficient financial resources and inadequate facilities of universities may be affected by both internal and external environments. University Sports Organizations may be self-generated or/and external funded i.e. state funds or subsidies. Only 14.6 percent of the respondents indicate that the percentage of their total revenue that was self-generated as opposed to state funds for the current fiscal period was more than 50 percent. In addition, 15.9 percent of University Sports Organizations state that they were only receiving external funding. It seems that University Sports Organizations depend in the majority on external funding, which suggests that these organizations may not be able to develop their own competencies to accomplish their mission and objectives.

From another point of view, a small increase in the percentage of students participating in University Sports Organizations' competitions as opposed to the students engaged in higher education institutions' is presented within the past five years, while a small increase of self-generated revenues as opposed to state funds is presented within the same period. This observation may lead to the conclusion that as long as organizations tend to be more self-supporting, the percentage of students participating in official competitions is increased. Nevertheless, the findings showed that the extent of strategic planning undertaken by University Sports Organizations was independent by the percentage of self-supported organizations as opposed to state funded organizations.

In addition, the model of governance may reveal information about the way organizations are funded. Cooperative and private University Sport Organizations are typically more capable of having self-generated revenues comparing to public organizations that usually are financially supported by the state subsidies. The study indicated that the organizations' model of governance was not significantly related to the extent of strategic planning utilized by the organizations. It should also be noted that approximately 21 percent have not stated their financial information, which constrains

inferences. University Sports Organizations may have not answered because of the lack of such information (structured data) or because of the lack of experience in financial estimations.

However, it may be questioned whether the high percentage of non-strategic planners can be justified by the main discouraging factor which is insufficient financial resources.

9.   University Sports Organizations may have to realize that fundamental changes may be imperative towards sustainability. According to Crompton (2009), four complementary repositioning strategies can be identified for an organization to be effective: a) *real repositioning*, meaning the development of new services and the restructuring of existing services; b) *associative repositioning*, meaning to align other organizations that already possess the desired position; c) *psychological repositioning*, meaning to change stakeholders' beliefs about the outcomes that comes from the services offered; and d) *competitive repositioning*, meaning to alter stakeholders' beliefs about what a competitor does. It appears to be imperative that University Sports Organizations a) review the status of their organization in order to examine the extent of suitability regarding financial issues and positioning to the desired level, b) assess the competencies and capabilities of their organization in order to fulfill their vision, and c) benchmark the external environment they compete or collaborate in so as to identify areas for improvement.

10.   Student participation in sport activities outweighs all other internal factors in the formulation of the organizations' plans since the proportion of organizations which stated that they consider this factor to a great extent was 89 percent, while 78 percent of the respondent organizations state that they greatly consider athletic performance excellence. These findings may be viewed as the philosophy or trend of the university sport sector. It can be assumed that inconsistency occurring regarding the organizations' philosophy, may have a negative impact on the organization's purpose of existence.

In addition, it can be assumed that the vision and philosophy of University Sports Organizations are interrelated components, which reflect the organizations' purpose of existence. Oakland (2001) argues that it is imperative to "concentrate on a philosophy of prevention rather than detection of problems" (pp.7). In addition, Bratianu and Balanescu (2008) identify vision to be an idealistic prediction in an uncertain future, seeking a mature and successful position. The vision and philosophy should be fully agreed by all the official members of F.I.S.U.

11.   Only 31 University Sports Organizations (37.8 percent) have a formal planning committee. In addition, although a high percentage of the organizations (73.2) indicated that they consider to a "great" or "very great" extent the Technical delegates' opinion and 64.2 percent appreciate the student-athletes' opinion to the same extent, only 46.9 percent of the respondents incorporate advisory committees to a "great" or "very great" extent.

Given that a small percentage of University Sports Organizations (27 percent) have been engaged in long-range plans for more than ten years, and that Training and Education of the staff is less significant as an internal factor, it may be questioned whether many University Sports Organizations formulate, implement and evaluate the strategic plans based on a systemic decision-making framework and structured procedures.

12.   Alves et al., 2007 support that the dimensions of organizational culture may influence the level and the frequency of creativity and inspire the unfettered flow of new ideas. Organizational excellence i.e. quality, effectiveness, efficiency, and Creativity and Innovation i.e. new ideas, empowerment and involvement of the staff, are two factors acknowledged to a "great" or "very great" extent by most of the respondents (80.5 percent and 72 percent respectively). Mason (2007) stated that an integral part of decision making is the degree of flexibility and adaptive innovation an organization has in order to anticipate environmental change. Strategy formulation should be undertaken according to the needs of an organization in an ever demanding environment. Therefore, it could be beneficial to answer the following questions: a) which are the opportunities enabling the involvement of quality management systems; b) do our policies clearly define a pathway towards organizational excellence; and c) does our organization have a system that may support and further new ideas and innovations.

This study examines the extent of strategic planning used by 153 countries worldwide. Factors such as demographics, social values and attitudes, educational trends, economic/tax considerations, state/federal mandates and guidelines, or/and other political status quo (externally related factors), may affect an organization's general direction and philosophy. This study reveals that Educational trends are considered to a "great" or "very great" extent by more than 70 percent (72 percent) of University Sports Organizations when formulating plans, followed by social trends (62 percent).

This observation seem to be in harmony with the nature of university sports sector, reflecting both its socio-academic and multi-faceted character and the need to interrelate different aspects of the strategic planning development. Future research is imperative to investigate differences occurring in each country related to its legal and economic framework, as well as each organization's statutes.

However, developing, implementing, and periodically evaluating a strategic planning process may help University Sports Organizations to organize information obtained, systemize strategic thinking, structure decision making, objectively forecast forthcoming situations, plan every action thereby achieving prospective results, and eventually shift from the desirable sustainability to organizational excellence.

Findings of the study indicate that the factors that constrain to a "great" or "very great" extent strategic planning by a percentage less than 25 percent were: a) resistance to planning by staff, b) lack of planning policy, planning is not valued by organization's Board members, and c) lack of adequate communication / collaboration within the organization. A high percentage of 63.3 of University Sports Organizations were not identified as strategic planners. Other factors rather than commitment to planning inhibit the development of the entire planning process. Based on this important observation it may be questioned whether the high percentage of non-strategic planners can be justified by the main factor which is insufficient financial resources presented above.

The findings presented and discussed above have implications for the development and establishment of the strategic planning process in University Sports Organizations.

5.3. *Implications*

With the different challenges facing University Sports Organizations, one may wonder if it is possible to develop a generic strategic planning model, which can be implemented by University Sports Organization members of F.I.S.U.

Quality services, accountability, and sustainability are imperative for University Sports Organizations not only to survive, but also to create value for their shareholders and society as a whole. The findings already presented and discussed have an impact on the development and application of the strategic planning process in University Sports Organizations.

1.   The proposed model will help University Sports Organizations to be better able to: a) establish and periodically review/reconsider a shared mission, goals, and objectives; b) provide an insight into organizations' core competencies and capabilities, and critical success factors; c) identify the factors that actually constrain the development and use of a strategic planning process; d) identify the opportunities and threats or challenges of the environment in which they operate, and consider the possibility of transforming them effectively; e) develop a measurement system involving standards and objectives of short-, mid-, and long-range strategies, and use key performance indicators for each goal and objective; f) identify the appropriate priorities for each strategy; g) establish and periodically evaluate short-, and mid-range strategies and objectives aligned with long-range strategies and objectives; h) develop contingency plans; and i) evaluate strategies and performance. In order to systematically and effectively adhere to the complete strategic planning process model, University Sports Organizations should espouse a philosophy of training and education, innovation, and creativity. Transformation and fundamental changes are time consuming, and thus commitment to a shared vision is indispensable.

2.   Since financial resources are the most significant constraint to strategic planning, University Sports Organizations need to realize that they need to commit the scarce financial resources to training and education in order to provide necessary planning skills. This position is supported by the fact that training and education is not considered to a "great" or 'very great" extent of the majority of the respondents, and by the fact that only 57.6 percent of the respondents stated they were satisfied with staff abilities and skills. Educational programs may emphasize such skills as strategic thinking, problem solving and decision making ability, communication skills, finance, and generally, management skills (i.e. leadership, time management, crisis management, change management, quality tools and techniques).

3.   Although innovation and creativity is a highly valued factor when formulating plans, only 42.3 percent declared satisfied with this factor outcome. University Sports Organizations should develop a "systems mechanism" open to new ideas which are structured and documented. The above observation seems to be consistent with the low level of satisfaction for organizational culture open to new ideas.

4.   Given that the majority of University Sports Organizations have not been engaged in long-range plans for more than ten years and that the majority of these organizations were classified as non-strategic planners, it seems beneficial for F.I.S.U. to create a

communicative network system, open to its members offering consultation, facilitation and knowledge that can help University Sports Organizations in the application of the strategic planning process.

5.4. *Recommendations for Further Study*

The review of literature in the area of strategic planning in the sports sector and above all, in the university sports sector is very limited. This highlights the need for such a study, which may constitute the basis for further research in this area.

Based on the findings of this study, the following recommendations are offered for future research:

1.   Follow-up studies should be done to the same sample within the next five years to identify possible changes in the application of the entire strategic planning process.

2.   Research needs to be done to the same population (University Sports Organizations members of F.I.S.U.) to assess qualitatively the extent of strategic planning. There are three primary means of qualitative data collection a) observation, b) interviews, and c) examining documents (Tenenbaum & Driscoll, 2005). Interviews and observation issues would concentrate on (1) the classification of data used in planning, (2) the quality and management tools that are encountered, (3) membership of the planning committee and specific roles in planning, (4) the type and philosophy of leadership that may influence an organization's attitude toward strategic planning, (5) the unique status quo and (6) individual factors affecting each University Sport Organization. Examining documents would rigorously assess issues of implementation, identifying the consistency of these documents to organizations' strategic issues and priorities. This study may also assist in identifying best practices that can be used as a model for the university sports sector.

3.   Research needs to be done to the same population to analyze in depth every short-term strategy linked to each functional area. The extent that these strategies address the organizations' overall strategy should also be analyzed. Since financial resources appear to be the main factor that constrains strategic planning, it may be useful to investigate financial issues along with issues concerning regulations that may affect the economic status quo of each University Sports Organization. In addition, since information gathered in this study related to financial resources of University Sports Organizations was not adequate for sufficient inferences, future research may be

designed for this field. An in-depth analysis of self-supporting organizations in relation to externally-funded organizations and their influence on strategic planning may be useful.

4.   Research study of the same population may be useful to investigate the performance measurement systems University Sports Organizations utilize. It would be necessary to analyze which key performance indicators and measures are aligned with each goal, objective, and aspect of performance. In addition, it would be necessary to establish which measures of technical quality of the performance measurement system would be appropriate.

5.   Qualitative research may be useful to address possible differences occurring among the five continents. This comparative study may reveal information about legal and economic regulations affecting the operation of University Sports Organizations. In addition, the examination of the organizations' statutes may have implications about changes which are necessary for University Sports Organizations to be more efficient.

6.   Future research needs to be done to design a survey instrument both valid and reliable, which could be used in any sports organization to evaluate rigorously the effectiveness of the implementation of a strategic planning process.

7.   Finally, most of the questions, structured from multiple items answered in a typical Likert scale, factor analysis, followed by Cronbach's reliability analysis were employed in a pilot attempt to ascertain the multidimensionality of each construct and the internal consistency of the extracted factors. Factor analysis yielded components (factors) with an eigenvalue greater than one that explains a significant proportion of the total variability. The nature of this multidimensionality in every construct should be analyzed. A future study may be useful to explore new latent variables to assess factors associated with a strategic planning process. Research needs to be carried out with the same population (University Sports Organization members of F.I.S.U.), examining the new extracted latent variables, followed by a comparative analysis with the initial variables. Such an analysis can be used as an assessment tool for a strategic planning process. In addition, this can be applied to any sport organization.

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VII. APPENDICES

ASSESSMENT OF PLANNING ACTIVITIES IN UNIVERSITY SPORTS ORGANIZATIONS (N.U.S.F. MEMBERS OF F.I.S.U.)

A. Please check which of the following activities are included in your organization's **current planning process**.

1.	Developing the vision (future image of your organization) of the organization's future direction and aspirations	YES [ ]	NO [ ]
2.	Developing the mission statement (purpose of your organization's existence) that describes the organization's purpose and philosophy	YES [ ]	NO [ ]
3.	Assessing the organization's strengths and weaknesses	YES [ ]	NO [ ]
4.	Assessing the organization's opportunities and threats	YES [ ]	NO [ ]
5.	Developing the organization's goals and objectives	YES [ ]	NO [ ]
6.	Developing long-range plans (or strategies) to achieve organization's mission and objectives	YES [ ]	NO [ ]
7.	Developing short-range plans	YES [ ]	NO [ ]
8.	Periodically evaluating the performance of the organization's planning process (items ≠1 to ≠7 above)	YES [ ]	NO [ ]
9.	Periodically evaluating the organization's performance relative to mission and objectives	YES [ ]	NO [ ]

B. The following factors are **externally related** to the organization.
Please indicate, by circling, to what extent they are considered when formulating your plans.

		Considered to a Very Little Extent	Considered to a Little Extent	Considered to Some Extent	Considered to a Great Extent	Considered to a Very Great Extent
1.	Political trends	1	2	3	4	5
2.	Educational trends	1	2	3	4	5
3.	Social trends (values, attitudes)	1	2	3	4	5
4.	Economic/Tax Considerations	1	2	3	4	5
5.	Demographic trends	1	2	3	4	5
6.	State/Federal mandates and guidelines	1	2	3	4	5
7.	Technology trends	1	2	3	4	5
8.	Community opinion	1	2	3	4	5
9.	N.U.S.F. policies and future trends	1	2	3	4	5
10.	Small and Medium Enterprises plans	1	2	3	4	5
11.	Sponsors	1	2	3	4	5
12.	Media	1	2	3	4	5
13.	Civic organizations	1	2	3	4	5
14.	Religious groups	1	2	3	4	5
15.	Competitors (e.g. other sport federations)	1	2	3	4	5

	1	2	3	4	5
16. Entertainment industry	1	2	3	4	5
17. Suppliers (equipment, services)	1	2	3	4	5
18. Spectators	1	2	3	4	5
19. Board of Trustees (University Administration)	1	2	3	4	5
20. Higher Education's policy and strategy	1	2	3	4	5
21. Governmental Health Policy	1	2	3	4	5
22. Parents of the student-athletes	1	2	3	4	5
23. Other (please specify)					

C. The following factors are **internally related** to the organization.
Please indicate, by circling, to what extent they are considered when formulating your plans.

	Considered to a Very Little Extent	Considered to a Little Extent	Considered to Some Extent	Considered to a Great Extent	Considered to a Very Great Extent
1. Athletic performance excellence	1	2	3	4	5
2. Student participation in sport activities	1	2	3	4	5
3. Financial performance	1	2	3	4	5
4. Administration staff performance	1	2	3	4	5
5. Advisory committees	1	2	3	4	5
6. Student-athletes' opinion	1	2	3	4	5
7. Technical delegates' (e.g. coaches', competition officials') opinion	1	2	3	4	5
8. Technical delegates' (e.g. coaches', competition officials') performance	1	2	3	4	5
9. Athletes' academic achievement	1	2	3	4	5
10. Adequacy of facilities	1	2	3	4	5
11. Academic schedule	1	2	3	4	5
12. Marketing processes (informational, programming and control systems)	1	2	3	4	5
13. Training and education of the staff	1	2	3	4	5
14. Organizational excellence (quality, effectiveness and efficiency of your organization)	1	2	3	4	5
15. Creativity and innovation (new ideas, empowerment and involvement of the staff)	1	2	3	4	5
16. Other (please specify)					

D. Please indicate, by circling, the extent to which the following items **discourage planning** in your organization.

	Considered to a Very Little Extent	Considered to a Little Extent	Considered to Some Extent	Considered to a Great Extent	Considered to a Very Great Extent
1. Insufficient training and experience in planning procedures	1	2	3	4	5
2. Lack of adequate communication / collaboration within the organization.	1	2	3	4	5
3. Lack of adequate communication / collaboration between organization and F.I.S.U.	1	2	3	4	5
4. Resistance to planning by the staff	1	2	3	4	5
5. Insufficient time	1	2	3	4	5
6. Insufficient financial resources	1	2	3	4	5
7. Inadequate facilities of universities	1	2	3	4	5
8. Conflict between athletic and academic time schedule	1	2	3	4	5
9. Lack of a planning policy	1	2	3	4	5

10.	Planning is not valued by organization's Board members	1	2	3	4	5
11.	Organizational culture gap between F.I.S.U. and organization	1	2	3	4	5
12.	Other (please specify)					

E. Please check which of the following best describes **the level of planning** in your organization. (<u>Please check only one</u>).

1. _____ **Structured strategic plans**: That is, **formalized written**, **long-range plans**, involving organization's mission, objectives, and strategies, based on organization's strengths and weaknesses; past, current, and future performance; and opportunities and threats analysis.

2. _____ **Structured operational plans**: That is, **written**, **short-range operational budgets** and **plans of action** for the current fiscal period.

3. _____ **Intuitive plans**: That is, **informal plans** developed and implemented based on the intuition and experience of the organization's administration team. They are **not written** but rather stored in the memories of the organization's administrators. They are also of short duration.

4. _____ **Unstructured plans**: That means that **no measurable structured planning** exists in the organization.

F. Please indicate, by circling, the extent to which your organization's plan **incorporates** the following items.

		Incorporates to a Very Little Extent	Incorporates to a Little Extent	Incorporates to Some Extent	Incorporates to a Great Extent	Incorporates to a Very Great Extent
1.	Marketing plan	1	2	3	4	5
2.	Facilities master plan	1	2	3	4	5
3.	Financial plan	1	2	3	4	5
4.	Human Resources plan	1	2	3	4	5
5.	Contingency plan	1	2	3	4	5
6.	Quality management plan	1	2	3	4	5
7.	Event Management plan	1	2	3	4	5
8.	Other (please specify)					

G. Please identify the number of years your **short and long-range plans** cover.

Short-range plans _____

Long-range plans _____

H. For how many years have you been engaged in **long-range (strategic) planning**?

_____

I. Please indicate, by circling, the frequency of **performance measurement** relative to **short-range plans**.

1. Never
2. Daily
3. Quarterly
4. Semi-annually
5. Annually
6. When a problem is evident
7. Other (Please specify) _____

J. Please indicate, by circling, the frequency of **performance measurement** relative to **long-range plans**.

1. Never
2. Semi-annually
3. Annually
4. Biennially
5. When a problem is evident
6. Other (Please specify) _____

K. Is there a **formal planning committee** in your organization?

YES   [   ]
NO   [   ]

If YES please specify _____

L. If you do **not** have a **formal planning committee**, do you plan to establish one within the next two years?

YES   [   ]
NO   [   ]

M. What **percentage of your total revenues,** during the past five years, was **self-generated**? (Examples of self-generated revenue are ticket sales, concessions, sponsorships, TV and radio, etc. **as opposed to state funds / subsidies**).

2005	
2006	
2007	
2008	
2009	

N. Please, indicate **the percentage of self-generated revenues** stemming from the following sources, within the past five years:

	2005	2006	2007	2008	2009
Sponsorships					
TV and radio rights					
Concessions					
Tickets					
Donations					
Merchandising					
Competition entry fees					
Annual affiliation fees					
Other (please specify)					

O. Please indicate, by circling, **your title** in the organization.

1. President
2. Vice-president
3. Secretary-General
4. Human Resource Manager/Director
5. Treasurer / Financial Manager/Director
6. Public Relations Manager/Director
7. Event Manager/Director
8. Other (please specify) _____

P. Please indicate, by circling, **your background** and **experience** (Circle as many as applicable).

1. Present or former Coach / Physical Educator
2. Former Assistant or Associate Athletic Director
3. Former Business Manager
4. Manager / Professional in the private sector
5. Manager / Professional in the public or educational sector
6. University professor
7. Other (please specify) _____

Q. Please indicate, by circling, your **educational background**.

1. High school
2. Bachelor Degree
3. Master Degree (MSc, MA, M.B.A.)
4. Doctoral Degree (Ph. D.)
5. Post – Doctoral Degree

Other (please specify) _____

R. Please indicate, by circling, **the type** of your organization.

1. Federation
2. Committee
3. Association
4. Other (Please specify) _____

S. Please indicate, by circling, **the model of governance** of your organization.

1. Public
2. Private
3. Cooperative
4. Other (Please specify) _____

T. Please specify, the number of students engaged in **sport activities in higher education**, within the past five years.

2005	
2006	
2007	
2008	
2009	

U. Please specify, the number of **students participating in competitions of your organization**, within the past five years.

2005	
2006	
2007	
2008	
2009	

158

V. Please specify, what is the number of students participating in **national**, **regional**, **interregional**, and **international competitions**, during the past five years.

	National	Regional	Interregional	International
2005				
2006				
2007				
2008				
2009				

W. Please indicate, by circling, your **level of satisfaction** for your output of the following factors.

		Satisfied to a Very Low Extent	Satisfied to a Low Extent	Satisfied to Some Extent	Satisfied to a Great Extent	Satisfied to a Very Great Extent
1.	Financial performance	1	2	3	4	5
2.	Staff abilities and skills	1	2	3	4	5
3.	Staff performance	1	2	3	4	5
4.	Athletic performance	1	2	3	4	5
5.	Technical delegates' (e.g. coaches', competition officials') performance	1	2	3	4	5
6.	Number of student participating in competitions of your organization	1	2	3	4	5
7.	Attendance of students participating in the international competitions and meetings	1	2	3	4	5
8.	Communication with the F.I.S.U. members	1	2	3	4	5
9.	Adequacy of facilities	1	2	3	4	5
10.	Quality of services delivered	1	2	3	4	5
11.	Creativity and innovation of staff	1	2	3	4	5
12.	Organizational culture open to new ideas	1	2	3	4	5
13.	Organizational sustainability and flexibility	1	2	3	4	5
14.	Consistency in social responsibility	1	2	3	4	5

Please check here if you would like a copy of the summary results of this study

Thank you very much for your time and consideration.

UNIVERSITY OF PELOPONNESE **DEPARTMENT OF SPORT** **MANAGEMENT** **Lyssandrou 3-5** **Sparta** **Greece**

Sparta, December 21, 2009

Dear, Mr/Ms:

I am conducting a Master's thesis study titled, "Strategic planning in University Sports Organizations (members of F.I.S.U)". Chairman of the Master's thesis Advising Committee is Associate Professor Thanos Kriemadis, specialized in Strategic Planning.

During the past few years, University Sports Organizations of F.I.S.U. (members) have faced a great number of changes (financial problems, aging facilities, developments in technology, new F.I.S.U. regulations, e.t.c.). Thus, the issue of strategic planning is of great importance and we consider that University Sports Organizations should begin to recognize that planning is necessary to meet the challenges of an ever changing environment.

Would you please take a few minutes to complete the questionnaire and return it to me by E-mail or Fax. I would really appreciate it if you could do that by January 10, 2009. If you are personally unable to respond to this questionnaire, please refer it to a member of your staff who is familiar with your University Sports Organization's planning process.

Since your organization represent the university sports of your country, it is important to complete the questionnaire at **least three Board members** who are familiar with your University Sports Organization's planning process. Your responses will be numerically coded to ensure anonymity and confidentiality. If you would like a summary of the results of this study, please check the appropriate place on the questionnaire.

Thank you for your valuable time and consideration.

Sincerely,

Emmanouella Skoula
MSc Candidate, Sport Management

Enclosures

Cover Letter for Second Mailing

> **UNIVERSITY OF PELOPONNESE**
> **DEPARTMENT OF SPORT**
> **MANAGEMENT**
>
> **Lyssandrou 3-5**
> **Sparta**
> **Greece**

<div align="right">

Sparta, February 1, 2010

</div>

Dear, President, General Secretary, Board members:

About a month ago, I sent you a letter asking for your participation in a study regarding the planning activities which occur in University Sports Organizations (members of F.I.S.U.). The results of the Worldwide study will be used to develop a model which find useful in your future planning efforts.

Information from your organization is very important to the success of this study, since your organization represent the university sports of your country. Your response will be kept strictly confidential.

In the event that your questionnaire has been misplaced, a replacement is attached. Please return the questionnaire, by e-mail or by fax, by February 26, 2010.

Thank you for your valuable time and consideration.

Sincerely,

Emmanouella Skoula
MSc Candidate, Sport Management

Enclosures