

DIRECTORS AND THEIR HOMEWORK: DEVELOPING STRATEGIC THOUGHT

Extract

This paper makes the case for more systematic development of the strategic thinking, or “meta thinking”, competences of directors, as distinct from strategic planning. It reviews the historic development of the terms “governance”, “directing” and “learning”. It looks at the current political skewing towards board compliance through Codes, which are making the acquisition of strategic thinking skills more difficult, as well as the psychological blocks, both personal, and organisational which reinforce this. It proposes the development of regular and rigorous “director’s homework” using both the PPESTT analysis and the Learning Board model. It ends with proposing three ways of encouraging the development of director’s strategic thinking - the encouragement of the use of “intelligent naivety”, the development of divergent thinking styles, and the profiling of Thinking Intentions.

1. INTRODUCTION

Steerage and Leadership: An Historic Review

Although “corporate governance” is assumed by many to be a fashionable modern concept it is not. It is as old as recorded history. Yet ignorance of this has led to the present cottage industry in reinventing the wheel. So Rather than reinforce this abuse of academic and consultancy resource let us look a brief and selective history of the words we use now.

“Governance” is derived from the Greek *kubernetes* – the steersman. It gives us the notion of setting direction, of directing, the key to effective governance provided only that other people are willing to follow the proposed lead. However, the original Greek gives us another modern word – “cybernetics”. This notion of an integrated system for steerage in turbulent times has dropped out of fashion in the last two decades. I argue that it is as important to modern governance as steerage. The two are inextricably linked by the need for a system of *learning*. In contrast to the classical roots of governance and direction “learning” is very Anglo-Saxon deriving from Old High German “leornung” into Old Northumbrian English, and made manifest in the writings of St Cuthbert. Even then it had a meaning which resonates still today. It was less about teaching than about the transformation of an individual or group through the self-processing of information into knowledge, values and skills. Despite its bad press Anglo-Saxon society, before the Viking and Norman invasions, was essentially democratic in nature with elected Kings and codified individual rights and duties. It is these often long-forgotten values which I believe are currently re-emerging strongly in the global corporate governance debate.

The term “gouvernance” appears in Geoffrey Chaucer’s *Nun’s Priest’s Tale* in the *Canterbury Tales*, referring to the governance of Chantecleer the cock of his seven hens, and his dungheap (some would say that nothing changes). It is mentioned in Machiavelli and briefly in Adam Smith’s *The Wealth of Nations* but the term goes into hibernation in the English language until 1976 and the publication of Prime Minister Harold Wilson’s “the Governance of Britain”, when people start asking where the word originates. Bob Tricker publishes his seminal book *Corporate Governance* in 1984 but in the UK people are not exercised by the term until Robert Maxwell’s pillaging of the Mirror Group Newspapers’ pension fund, and the later BCCI fraud. The Cadbury Committee’s Report in 1992 on “The Financial Aspects of Corporate Governance” is the first sign of growing public awareness of the issues, and has set a world standard for such reports (of which there are now over three hundred). The US’s Sarbanes-Oxley Act of 2002 being the most draconian, globally far-reaching, and potentially capitalism-destroying of all.

2. STRUCTURE AND POLITICIANS DRIVE OUT BOARD STRATEGIC PROCESSES EVERY TIME

But a major criticism of such reports and codes is that they tackle only half of the problem. The classical directoral dilemma is “how do we drive this enterprise forward whilst keeping it under prudent control?” It is both dynamic and irresolvable, which is why owners pay for direction-givers. However, politicians under pressure from voters to explain why their pension funds, 401ks, and wealth disappeared through bad direction

and executive fraud and incompetence have only one tool – legislation. And they over-use it by prescribing what they see as appropriate board structures, reporting procedures, code compliance etc. Indeed there is a major temptation to keep on over-prescribing compliance processes because they cannot ever get close to the individual and group dynamics of what actually happens in real-time behind the boardroom door. And neither should they. However, if directors are to continue to demand that they self-regulate as a professional grouping, then they need to show that there are causal relationships between their ability to give direction to their organisation, and the final performance of the total enterprise. In too many cases this is not proven. From my empiric observations this seems to be because too many directors are locked into an executive mindset and are resentful at the idea of having to re-train to become true direction-givers. Indeed they often are uncomfortable at thinking about the future.

3. HOW DIRECTORS AVOID THINKING ABOUT THE FUTURE

Most board directors do not have systems for, budget time for, nor have little sustained interest in, thinking regularly and rigorously about the future health of their businesses. This surprising finding comes from my own work on the preferred thinking patterns of statutory directors in the UK (1), the work on *Directors' Dashboards* by my colleague Ram Ramakrishnan in South East Asia (2), my colleague Clive Morton's work published in *By The Skin Of Our Teeth* (3). Even a cursory check on the amount of time budgeted annually by a board for its proper direction-giving roles of formulating policy and developing strategic

thinking should prove this, especially when compared to the amount of board time spent trying to micro-manage the executives.

Director's Meta-Thinking Needs

This is curious. Why should there be such an aversion by statutory directors to learning how to think strategically? If we accept that the term *meta* in ancient Greek - means both larger, and above the mean - defined by Kaufman (4) to include societal impacts and consequences, then meta-thinking demands both a change of board priorities leading to a change of board perspective and role, and a concerted effort to sustain it. This means raising their eyes for even short periods of time away from the immediate, executive world of instant delivery and instant gratification to one where they reach the more reflective, and yet paradoxically more proactive world of *strategic thinking*. Psychologically one should help directors reframe their role so that they feel it both necessary and legitimate to budget time on these reflective, longer-term activities and so develop their "helicopter view" and consequent competencies. Further, the development in both the individual director, the board, and the total organisation of such "double loop" learning (5) and (6) is a way of rising above the daily pressures of the executive treadmill to fulfil the long term, directoral role. This demands that the direction-givers are capable not only of regular and rigorous scanning of their socio-political environment but have then the capacity to assess the strategic risks associated with their analyses, and be able to take wise decisions on the broad deployment of their scarce resources to benefit the long-term health, and prudent control, of the business thus maintaining their legal *fiduciary duty* to their owners.

I find Sir Brian Pitman's definition of shareholder added value useful here – “the economic value added after taking into account the reasonable short-term demands of the owners, the cost of capital, and ensuring the long-term health of the business”. Looking at the complex dilemmas contained within this simple sentence reinforces the argument that direction-giving is not a simple add-on to an executive career. It is qualitatively different.

Executive life is rarely this complex. It may seem so but the issues are usually ones of solving complex *puzzles* (to which there is ultimately an answer), not having to take the responsibility of stating the nature of the strategic *problem* in the first place (and to which there cannot be just one answer). In my UK studies less than twenty percent of the directoral population (regardless of the size of their business) have either the interest or innate capacity to rise to the "meta" level of thinking. I find that there are three main reasons for this:

- ignorance of, and a lack of ability in, differentiating between the executive and direction-giving roles in an organisation
- confusion over the legal position and liabilities of direction-givers as distinct from executives
- fear and irritation in effective executives at the suggestion that they would have to learn new attitudes and skills to become an effective direction-giver.

4. DEVELOPING THE DIRECTORAL MINDSET TOWARDS MEGA-THINKING AND TRUE CORPORATE GOVERNANCE

Agreeing The Meaning of "Policy" and "Strategy"

Effective direction-giving thrives on dilemmas. On the one horn is the act of driving the enterprise forward. On the other horn is the act of keeping it under prudent control. It is the prime task of the board of directors to keep these in dynamic balance. And they will never get it completely right. The difference between the two is the risk that the directors take in their governing role. Meta-thinking helps reduce these risks by setting them in wider and more dynamic contexts and creating a feedback system for rapid learning from them.

There are two intellectual foundations for creating effective organisations which have been around for some three-and-a-half millennia. The Greeks used the terms "policy" and "strategy" to define those higher levels of thinking above the day-to-day "tactics" which nowadays we tend to call "operations" – the land of the executives. Many corporations either are ignorant of these terms or are arrogant enough to assume, Tweedledum-like, that any word means what they say it should. This was lays madness. Let us look more closely at these two "meta" words.

Policy is the highest level of intellectual thought in an organisation. It comes into the English language from the ancient Greek "polity". It concerns the board's understanding of the wider "political" environment which allows the energy niche within which their organisations exist currently. It is not, therefore, "policy-as-organisational-rules" e.g. who

gets which vacations, which parking slot etc. This is an abuse of the term perpetuated still by some business schools and consultancies. Policy Formulation demands that the board budgets time, and develops the intellectual capacity, to understand the complex inter-relations between their company and the wide environment energising or threatening their business. This includes finding ways of tracking changes in, at the very minimum, the following environments:

- Political
- Physical
- Economic
- Social
- Technology
- Trade (World)

and then being able to make some sense of them in relation to the business' Purpose, Vision and Values, and then adding of shareholder value.

PPESTT Is The Start Of The Board's "Homework"

Many business folk balk at this "PPESTT" concept. Indeed many say that they want as little to do with the "policy/political" world as possible. I am not arguing here that directors need to be party-political, nor be seen to support a specific political grouping. But I am arguing that they must be sensitive rapidly to changes in the wider "policy" environment, and to develop organisational nimbleness if they are to use this competitive intelligence to create the advantages needed to ensure the long-term future of their business. So a board learning system which sets each

director continuing homework in reviewing the PPESTT environments on a regular and rigorous cycle to feed into the strategic debates is crucial for the long-term survival of the business.

Strategy comes also from the Greek and was defined originally as "the world of the military general". Later it became accepted as meaning "the broad deployment of scarce resources to achieve our Purpose". The generals accepted, or debated, the political wishes to achieve national Purpose, then they deployed their forces to achieve this. Nothing much changes over time, except our abuse of words. The *meta-thinking* concept seeks to reverse such misuse. But at present the adjective "strategic" is one of the worst abused because many executives believe now that attaching it in front of a phrase makes that phrase more important and less open to critical questioning. Henry Mintzberg wrote the delightful book *the Rise and Fall of Strategic Planning* (7) in which he differentiates between "strategic planning" and "strategic thinking". He argues that "strategic planning" is a dangerous oxymoron, a contradiction in terms like "friendly fire" and "fun run". We both argue that planning in any organisation is crucial - but that it is the start of the executive round, not the role of the board. The board's role is to derive broad strategy from their policy formulation and foresight. Then they debate this with the executives who commit to the strategy and take it as the basis of their planning. The acid test of both directors and executives is whether this strategy is implementable, and whether the consequent rate of organisational learning is equal to the rate of change in the external environments. Strategy has to be flexible in a dynamic and uncertain world. Strategy must never be set in concrete as the reality on the ground, he unexpected disruptions from the environment, may invalidate the strategy no matter how careful the preparation. The

Prussian general von Moltke warned that “no plan survives after the first meeting with the enemy”.

What worries me about many of the corporations with whom I consult is even a basic lack of awareness of the importance of strategic *thinking* - the conscious or unconscious avoidance of "meta" level review and debate. I, and colleagues have written about this in detail separately in *Developing Strategic Thought* (8).

Such "meta-thinking" is about developing the board's understanding of the wider policy context, which by definition will always be risky.

Remember that the word “risk” comes from the Old Italian for “to dare” It is the essence of capitalism. Many boards are becoming more aware of their need have more systematic ways of debating and quantifying risk.

The four strategic approaches to risk are to:

- Eliminate it
- Outsource it
- Share it
- Take it

A board earns its keep in creating an optimal mix of these on any proposition with which it is faced. It is the ultimate source of decision-taking and accountability in the enterprise. It must, therefore,

Encourage directors to *learn* consciously through fast feedback how to broadly deploy their scarce resources to achieve their Purpose. This is

expressed most clearly through their strategy statement which must include a combination of the five classic elements of strategy:

- where we will advance (products, services, geographic areas)
- where we will retreat (short-term redeployments)
- where we will hold our ground
- where we will make alliances
- where we will withdraw totally

5. TOWARDS THE *LEARNING BOARD*

When creating a regular and rigorous system of board learning many organisations across the world have found it helpful to adopt the *Learning Board* model and process (9). This develops the fundamental notion of the board having to balance continuously Board Conformance (keeping the business under prudent control) and Board Performance (driving the enterprise forward). It uses the horizontal axis of time and the vertical axis of internal or external perspective. (Figure 1). "Board Performance" covers the right-hand quarters of *Policy Formulation/Foresight* and *Strategic Thinking*. "Board Conformance" covers the left-hand quarters of *Supervising Management* and the *Accountability* of the board of directors. Figure 2 takes this basic framework into the detail of the full Learning Board model. Using the model I urge boards to develop their meta-thinking by focusing with their executives on two key interfaces of the Learning Board (the arrowheads in the right-hand quarters):

- the meta-level debate between the results of their *Monitoring of the External Environment* (PPESTT et al) and their subsequent *Positioning In The Changing Markets*.
- the debate between *Implementing the Strategy* and *Ensuring Organisational Capability* (10). This is where the effectiveness of a strategy is tested, often to destruction. My work on UK director's preferred thinking styles reinforces this point and will be discussed in more detail later in this paper. Often the lack of interest by a board in developing effective meta-thinking and subsequent strategies with the executives, combined with an unwillingness to hear bad news from those implementing the strategy, leads to the sub-optimisation of the strategy and at worst business failure. In complexity theory terms they can fool themselves into believing that they are winning when the truth is that they are losing in a changed environment (11).

But there is more to developing board effectiveness through meta-thinking than understanding a quadrant. The essence is not in the content but in the dynamic of the board's learning process. Accepting that there is an annual *rhythm* to a board's year is crucial. In its simplest form this means that the chairman ensures that:

- The board starts its year with an "awayday" which checks out Purpose, Vision and Values, and Corporate Culture (all of which are measurable) before getting into the deep meta-thoughts on Monitoring the external environment

- the board has at least quarterly "awaydays" to develop its strategy by taking the results of its Policy monitoring and debates into the key issues of organisational capability, strategic implementation and rapid learning systems
- ensuring that the monthly "numbers" session is restricted to no more than one hour so that there is not tendency for the board to try and micro-manage the executives from the boardroom table. With current software this is possible even for multinationals
- ensuring that at month nine of a financial year there is an "awayday" to ensure that the many Accountabilities demanded now by legislators and regulators are on track for the annual report in three months time. The days of desperately post-rationalising at month thirteen are now over.

This is not rocket science. But it does give the board a regularity and rigorous discipline, within an agreed picture of an annual process, which allows them to understand better their role, especially the importance of the meta-thinking aspects of it. And it gives them that "homework" to do, which I shall return to later.

6. OPENING UP THE BOARD'S META-THINKING PROCESSES

Where is the wisdom we have lost in knowledge? Where is the knowledge we have lost in information?

T S Eliot. The Rock 1934

The essence of ensuring mega-thinking in the boardroom is to allow sufficient "blue skies" time to ensure that the board is not dominated by data-overload. SOX has already made this more difficult for US executives. Indeed the attempt by President Bush's team to "stop the bad guy's" fraudulent practices has threatened the core notion of capitalism - business judgement based on thoughtful risk-taking. SOX seems based on the notion that better business judgement is based on increasing data complexity followed by increased order and control. This is a delusion. Effective corporate direction-giving is not about security. It is about the skill of judging risk based on hard and soft facts, and then committing to it. It is about developing corporate wisdom.

How can this be addressed? My experience is that the generation of a necessary level of humility in board members and executives in breaking away from their executive behaviours, plus a "helicopter view" reframing of their approach to their thinking processes, pays dividends. Humility is necessary to accept that many of the thinking and behavioural styles which allowed executives to scale the greasy pole become dysfunctional when they strive to become strategic thinkers. Whereas before their "shaping" behaviour (12) their focus on the short-term micro-politics at the top of their corporation (13), and a public stance of having to be seen as omniscient has proved successful (14), the opposite is true when they are trying collegially to ensure the long-term health of their business. If such earlier non-collegial behaviours are brought into the boardroom, then the chances of meta-thinking are reduced and the chances of interpersonal political conflict increased. There are three areas of directoral thinking, and subsequent learning, by which the mega-approach can be developed.

Using Intelligent Naivety

First, a useful start is to develop around the boardroom table the acceptability, indeed the necessity, of using *intelligent naivety* (15). This is a powerful concept which says that in this group it is OK to say "I don't know, tell me more". It assumes that the people sitting around the boardroom table are bright, but that many will be uninformed both about the technical details of the different specialist executive functions of the business, and of their direction-giving role. Once established as a group norm through the chairman the use of "intelligent naivety" helps stop "techno-babble" in a group i.e. the deliberate overuse of technical terms in the hope of intimidating into submission the non-specialists around the table. This can be made much worse if there is also a tacit agreement in the group that no specialist will question another specialist's area. This is the opposite of what a board of directors is meant to do. So the chairman must encourage those who do not understand, or doubt, what has been said to have the courage and collegial support to say just that, and to ask for a simpler explanation. Often this causes other directors to say that they had been wondering about this also and, with luck, the techno-babble deflates and the air is cleared for some meta-thinking.

Developing Divergent Thinking Styles

Second, many critics of current executives, and the business school's approach to the education process of MBA students, point to the analysis-only fixation of the programmes (16) and (17). The consequent "analysis-paralysis" is often applied thoughtlessly in practice. This is

hardly surprising as the notion of "convergent thinking" is deep in our secondary and tertiary educational institutes (18). The idea that the only way of problem-solving is to focus sharply on one element, strip out all the contextual information and go for a single "right" answer, is still deep in many executives', and professionals', mindsets. This explains in part why the business school and consultancy worlds, are dominated by quadrants as key instructional tools. Quadrants demonstrate two-dimensional thinking well. But the world is four-dimensional, so ultimately quadrants have limited use. Having trained with architects I am used to thinking in three and four dimensions, as do many physicists and mathematicians. Most executives are not, but need to be if they are to become effective directors.

The approach here is to encourage more "divergent thinking" - where C P Snow's two cultures (Science and the Arts) (19) are integrated (20). This does not exclude "convergent thinking" but ensures that the contexts are explored well *before* convergent thinking allows for final risk-assessment and strategic judgement. Divergent thinking is the core of the board's "homework". Statutory directors are paid to keep a constant watch on trends in the external environment and to feed these into the board's quarterly "awaydays" and their consequent mega-thinking. A simple start is to take the PPESTT framework and then have the board directors form "buddy pairs", either two directors or a director and an executive. Each pair takes one element of the PPESTT (political, physical, economic etc) and for three months monitors the trends that they see. These are reported back briefly (no more than four sides of paper) at the quarterly strategic thinking awaydays, debated, and then their portfolio is handed to another pair whilst they take a different one.

Over an eighteen month period this alone transforms the quality of mega-thinking on a board.

Profiling Thinking Intentions

Third, it is possible to quantify a person's thinking *preferences* i.e. the preferred sequence of a person's thoughts as they attempt to solve a problem. This happens in a person's mind before they open their mouth and before they are seen by others to behave. The best instrument I know for this the *Thinking Intentions Profile* (TIP) from Effective Intelligence Ltd (21). It is a self-assessment instrument which reviews three elements for effective thought:

Judgement

Describing the present

Realising the future

"Judgement" is essentially past-orientated and builds on a personal blend of logic and rationality, and values and commitment. "Description" is present-focused and builds on a personal blend of hard, quantifiable facts and "soft facts" (sensing the immediate political climate in a person or group). "Realising" is future-orientated and is about making the future happen. It is a personal blend of vision, and ingenuity.

These six elements of the TIP are then broken down into twenty-one subsets which I shall not go into now. However, I am now analysing a data-base of five hundred UK board directors and already there are some worrying findings (22) and (23). At least eighty percent of the population (male and female; private and public sectors) have a

distinctive pattern. They are strongest in the "soft facts" areas and their thinking thrives on the micro-politics which surround them. This is backed by a high second preference to use logic and rationality. So a tendency to post-rationalise strongly what they have just done micro-politically is evident. For me this begins to explain why meta-thinking often fails to get started. If one then looks at the *least* preferred thinking styles of the board directors in the sample, they are dealing with the hard facts, and last, having the ingenuity to want to make the future happen. This seems entirely paradoxical for direction-givers. More research is under way but, if true, this is an indictment of the training and development of the current generation of board directors. Having worked with directors on five of the six continents I would say from empirical observation that this holds true for the majority whatever their nationality.

7. CONCLUSION

Meta-thinking cannot be developed in direction-givers without having a strong intellectual framework to make sense of their increasingly complex and interacting external environment. Developing such understanding requires both a regular and rigorous process of continuous learning by the board. Here the *Learning Board* model is a useful tool. Such continuous learning also needs regular annual appraisal of the board as an effective working group, of each board committee, and of each individual director - as is now the regulation for UK listed companies (24).

Ultimately, meta-thinking occurs in private behind the boardroom door. If the directors have a strong chairman who understands the legal notion of each director being an equal colleague with the duty to comment critically on what the company and its executives are doing, and accept

that ultimately they as directors are personally and corporately accountable, then there is a sporting chance of their business having a healthy future. If there is a dominant figure who censors open thinking, critical review and the use of intelligent naivety, then the corporation is stuck in a "bad learning" cycle and is doomed finally.

But even in a "good learning" cycle there can be no certainty. Director's thinking is always about dilemmas (25) and trying to balance two opposing notions. It has to be. So I leave the final sentence to F Scott Fitzgerald:

The test of a first-rate intelligence is the ability to hold two opposed ideas in the mind at the same time, and still retain the ability to function.

The Crack-up 1936

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Figures

1. Basic Framework for the Learning Board
2. The full Learning Board model

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This paper is a development of the *Can Directors Think Strategically? Some Issues In Developing Direction-givers' Thinking To A Mega-level* published in the US's *Performance Improvement Quarterly*, Autumn 2005.