



Presents

So You Think Strategic Planning Is Passé! (Think Again!!)

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Content Leaders

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So You Think Strategic Planning Is Passé ...Think Again!

Definitions and Ideas To Consider Before Strategic Planning

Strategic Scenario—tells the future using creativity, design, and innovation.

- *Creativity* is the generation of new ideas—either new ways of looking at existing problems, or of seeing new opportunities, perhaps by exploiting emerging technologies or changes in markets.
- *Design* is what links creativity and innovation—shaping ideas to become practical and attractive propositions for users or customers. Its *creativity* deployed to a specific end.
- *Innovation* is the successful exploitation of new ideas. It is the process that carries those ideas through to new products, new services, and new ways of running the business or even new ways of doing business.

In Peter Schwartz's book, *The Art of the Long View*, he discusses the scenario process for future thinking as a practice that fundamentally alters an organization's culture. He suggests that in learning organizations, the leadership intentionally puts itself into thinking activities to experience how new ideas are formulated and translated. Scenario planning allows for that practice of inventing how the future **could** unfold.

Scenario Planning has us:

- Live in the present while rehearsing the future.
- Learn how to and then practice asking the right questions about the future.
- Foster resiliency and flexibility—key to innovation and adaptively in times of change.
- Able to identify what is unfolding around us with fewer surprises. It trains us to be “response-able” as the future happens since reality rarely follows any set of plans.
- Deliver the current value proposition while simultaneously morphing it into new opportunities with less effort, better leveraging organizational resources.

Scenario Planning is a source of inspiration that provides clear decision-making criteria. Features of an effective future statement that include:

- Realistic aspirations
- Clear, vivid and clear picture
- Description of a bright future
- Memorable and engaging wording
- Embraces and aligns the organizational values and culture



Just because something doesn't do what you planned it to do doesn't mean it's useless.

Thomas Edison



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Strategic Planning (text adapted from wikipedia)

Strategic Planning is an organization's process of defining its strategy (a plan of action to achieve a particular goal) or direction, and making decisions on allocating its resources to pursue this strategy, including its capital and people. It is practiced widely informally and formally.

The process deals with at least one of three questions: *What do we do? For whom do we do it? and How do we excel?* When completed, strategic planning and decision processes should end with objectives and a roadmap of ways to achieve SMART (Specific, Measurable, Achievable, Relevant and Time-bound) objectives and results.

Various analysis techniques can be used in preparation for strategic planning, including: *SWOT* analysis (Strengths, Weaknesses, Opportunities, and Threats), *PEST* analysis (Political, Economic, Social, and Technological), *STEER* analysis (Socio-cultural, Technological, Economic, Ecological, and Regulatory factors), and *EPISTEL* (Environment, Political, Informatics, Social, Technological, Economic and Legal).

There are several approaches to Strategic Planning, typically a three-step process:

- **Situation** - evaluate the current situation and how it came about.
- **Target** - define goals and/or objectives (sometimes called ideal state)
- **Path** - map a possible route to the goals/objectives

An alternative approach is called *Draw-See-Think*

- **Draw** - what is the ideal image or the desired end state?
- **See** - what is today's situation? What is the gap from ideal and why?
- **Think** - what specific actions must be taken to close the gap between today's situation and the ideal state?
- **Plan** - what resources are required to execute the activities?

An alternative to the *Draw-See-Think* approach is called *See-Think-Draw*

- **See** - what is today's situation?
- **Think** - define goals/objectives
- **Draw** - map a route to achieving the goals/objectives



If you're a leader, think about the impact of your decisions on seven generations into the future

Chief Wilma Mankiller, Cherokee



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Current Strategic Scenarios—They Are Not Passé

Preamble to US Constitution

We the People of the United States, in Order to form a more perfect Union, establish Justice, insure **Domestic Tranquility**, provide for the common Defense, promote the general **Welfare**, and secure the Blessings of Liberty to ourselves and **our Posterity**, do **Ordain** and establish this Constitution for the United States of America.

- Domestic Tranquility—One of the main goals of the Convention was to ensure the federal government had powers to squash rebellion and to smooth tensions between states.
- Welfare —Then it meant health, happiness, prosperity, and well-being. Today's usage also mean organized efforts on the part of public or private organizations to benefit the poor, or simply public assistance. This is not the meaning of the word as used in the Constitution.
- Posterity—Future generations; all of a person's descendants.
- Ordain—To order or as if by decree.

The Constitution has seven Articles and multiple Sections under each Article plus twenty-seven Amendments. Each of these additions to the original Preamble *scenario* keeps the intention, commitment and purpose alive—allowing its accomplishment to evolve.

FCCLA's Strategic Scenario

FCCLA is a national organization representing 300,000 family and consumer sciences **students** in partnership with its **advisers**. By **servicing** student members in middle level and secondary education and **influencing** grades K-16, by obtaining **business and industry** support and by networking with **related groups**, FCCLA is **highly recognized** by media, policy makers, employers, administrators, and the public. FCCLA members are **successful leaders** in their families, careers, and communities.

2008-2012 Strategic Goals

- I. Increase the number of members, advisers, and chapters.
- II. Expand the relationship with business and industry.
- III. Enhance the image and identity of FCCLA and its role in public policy advocacy.



**Failure is only postponed success as long as courage coaches ambition...
The habit of persistence is the habit of victory.**

-Albert Einstein



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Myths & Pitfalls

BEFORE		AT		AFTER	
<i>MYTHS</i>	<i>PITFALLS</i>	<i>MYTHS</i>	<i>PITFALLS</i>	<i>MYTHS</i>	<i>PITFALLS</i>
We don't need a plan, we know what we're doing!	BOD and staff don't mine their data gold and enter planning events w/ biases, and unsound beliefs	A good plan involves only staff & administrators	Disregarding staff involvement and participation.	Strategic Plans & budgets naturally align with all aspects of the plan being funded properly	The role of the CEO is minimal when it comes to executing the plan.
A SWOT analysis and member needs survey is sufficient to prepare for on-site planning event.		1-day planning event is sufficient time to collaborate in creating an organization's future		Once the plan is written, we are done with creating ideas—we just follow the plan as it is.	Plans rust and are doomed to failure unless they are maintained.
	Participants do little prep for the planning event—do not read advance materials or review research analysis.		Insisting on knowing “how” to achieve something before you choose “where” to focus” and “what” matters	Regardless of how a plan is created, staff is solely responsible for implementing it	The plan will not affect my real job! Only the management staff is affected by the strategic plan.
Staff is in continuous dialogue, able to measure previous successes and explain impact		The plan is inviolate and the next leader would never breach the plan with his/her agenda	Strategic Planning will provide us with all the answers and resources we need for our future.		Plan is not dynamic, cannot adjust to evolving conditions and lessons learned.
By the time we develop a plan it will be obsolete. We already know what we're doing.	Environmental trends scanning done infrequently with data collected used to forecast “most likely future.”		We don't need buy-in from all relevant stakeholders—the consultant writes the plan	A consultant can write your strategic plan in isolation	
Strategic Planning is a waste, takes too much time & resources. Why not put our resources toward providing needed services.		Members don't really understand our business at the national level.		This is an internal document, no need to post the plan on the Website.	Status reports take too much time and who reads them anyhow?



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FCCLA Strategic Scenario Chronology

BEFORE	AT	AFTER
<ul style="list-style-type: none"> • Long range plans not tied to any strategic objectives and date • Employee performance appraisals tied to job descriptions • Individual rather than team efforts were the norm • Decision-making process was ambiguous • Too much micromanaging • Change in leadership led to opportunity to improve organization • Business representatives raised issues about need for strategic objectives/metrics of success • Involved a wide range of stakeholders in creating a "wishes" list that seemed unique and rather comprehensive. • Collected and analyzed organization's historical data • Executive Director in collaboration with management team and consultant took the lead in the strategic planning process • Developed cross-section membership on the Strategic Planning team (Future Directions Task Force) 	<ul style="list-style-type: none"> • Collected data from key stakeholder groups • Needed to be strategic in releasing information and included key phrases/concepts of the field • Developed and then deconstructed the Strategic Scenario into 10 major objectives • Met with the Futures Task Force bi-weekly leading up to presenting the plan to the Board • Maintained that all issues were on the table including the criteria for organizational advisers • Engaged all staff in the planning process • Kept Board of Directors in the loop during the Task Force process • Generated a four page document (not a book) that contained the scenario, major objectives and action items • Was patient, communicated from <i>partnership</i>, enjoyed the process. 	<ul style="list-style-type: none"> • Imbed Strategic Objectives into departmental operational plans • Tie performance appraisals system to strategic objectives and metrics; the system includes all staff and Executive Director • Weekly management team meetings focuses monthly on strategic objectives, ensuring all items are out on the table for cross-departmental discussion and decision-making. • Have monthly staff meetings recapping status of scenario. • Encourage state affiliates to utilize National's Strategic Plan as the basis for their strategic planning process • Review and modify as necessary at each Board meeting including Board approvals • Deliver semi-annual status reports to stakeholder groups • Update Chair and Chair-elect on a bi-weekly basis • Have strategic goals and results prioritized, create a cohesive budget, especially when funds are tight before department create budgets. • As staff positions open up, examined them to see if they are still current or need changing to ensure strategic goals are met.



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Michael L. Benjamin, M.P.H., CAE

Appointed in September 2006, Michael L. Benjamin currently serves as the executive director of the Family, Career and Community Leaders of America (FCCLA). Prior to his appointment with FCCLA, Michael served as executive director of The National Council on Family Relations in Minneapolis, MN. Before that he was executive director of the Institute for Mental Health Initiatives, a component of the School of Public Health, George Washington University in Washington, DC. Throughout his career, he has worked on a variety of family issues, including work and family, mental health and the family, fatherhood, violence prevention and cultural diversity. Among his previous positions, Michael was chief operating officer of the Employee Assistance Professionals Association; served as the human services lobbyist and program director of both mental health and alcohol abuse prevention with the National Association of Counties; a health scientist administrator at the National Institute of Mental Health; and executive director of a large comprehensive community mental health center in Portland, Oregon. Michael has served on numerous boards in Washington, DC, Portland, OR and Minneapolis, MN and has extensive professional links with policy makers and professional associations and has published articles on mental health issues pertaining to families. He co-authored a chapter with his spouse Marva P. Benjamin, "The Role of Leadership in Addressing Issues of Race and Ethnicity: Cultural Competence as a Framework and Leadership Strategy" in the 2004 book titled *Promoting Racial, Ethnic, and Religious Understanding and Reconciliation*. Also in 2004, he co-authored a chapter in the book *Family and Community Policy: Strategies for Civic Engagement*. Michael is chair-elect of the North Carolina A & T State University's Human Environment and Family Sciences Advisory Board and a past member the University of Minnesota's Family Social Science Advisory Board. He holds a Bachelors of Art degree in psychology from Texas Southern University in Houston and a Masters in Public Health from Yale University. In 2006, Michael earned the designation of Certified Association Executive (CAE) from the American Society of Association Executives.

About FCCLA

Family, Career and Community Leaders of America is a nonprofit national career and technical student organization for young men and women in Family and Consumer Sciences education in public and private school through grade 12. Since 1945, FCCLA members have been making a difference in their families, careers, and communities by addressing important personal, work, and societal issues through family and consumer sciences education.

Today over 219,000 student members in nearly 6,500 school chapters are active in a network of associations in 50 states as well as in the District of Columbia, the Virgin Islands, and Puerto Rico. Chapter projects focus on a variety of youth concerns, including teen pregnancy, parenting, family relationships, substance abuse, peer pressure, environment, nutrition and fitness, teen violence, and career exploration. Involvement in FCCLA offers members the opportunity to expand their leadership potential and develop skills for life -- planning, goal setting, problem solving, decision making, and interpersonal communication -- necessary in the home and workplace.



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For almost 30 years, Rhea has been producing successful results for her clients with her customized *Creative Development Opportunities!* Embedded in each client interaction are experiences to enhance the organization's capacity for strategic thinking employing creative problem solving and collaborative action in pursuit of measurable results and desired outcomes.

Her areas of expertise include:

- **Strategic Scenario Facilitator and Implementation Guide**
- **Volunteer Leadership & Staff Development**
- **Workshops and Keynoter**

Cooking Up Leadership™— a highly engaging event confronting many everyday leadership situations while preparing a delicious three-course lunch. Participants become more aware of the gaps in their communications, performance and results. This workshop leverages learning, laughing and lunching with a great ROI for the time and effort invested.

Leadership Lessons from Lewis & Clark— The Lewis & Clark Expedition survived life-threatening moments by developing external partnerships along their journey while the Corp of Discovery maximized its skills and expertise. Learn how to translate L&C's lessons into your organization's strategic plan and build a future-focused roadmap using their expeditionary successes and failures.

Rhea's Creativity Room™—perfect for use as an annual conference high-energy experience or as an in-office session. This play-full space is designed to encourage curiosity and resourcefulness—both necessary to succeed at work and in life. The room's imaginative activities encourage individual and group engagement where attitudes shift, new thinking emerges, and alternative actions revealed.

Staging Memorable Experiences Ensures An Association's Future

When an association employs this 360° resource integration model, memorable membership value is guaranteed. When organizations embed and leverage their resources (*Events, Communications, Programs, Products, Processes, Services, and Relationships*) with offerings of indispensable knowledge, exceptional value occurs and recurs throughout the organization.

Future Lessons From Past Leaders — The Lewis & Clark Corps of Discovery

Part One of Three

By Rhea Blanken, Results Technology, Bethesda MD.

Over two hundred years ago, President Thomas Jefferson charged Meriwether Lewis and William Clark to lead a *Corps of Discovery* to find a water path connecting the east and west coasts of our newly expanded nation. The Corps extraordinary exploits and discoveries have remained fixed in the American imagination ever since.

Jefferson had additional reasons for going west and designed funding messages accordingly to secure support depending upon *who* needed to hear *what*. The Corps had scientific exploration, trade relations, and imperial expansion as its “supplemental” intentions. Each needed to be resourced and scheduled to guarantee its accomplishment.

The Lewis & Clark Corps of Discovery (L&C) operated within an “*expeditionary* mindset”. Everyday was a probe into an unknown world. They were living and learning moment-to-moment, aware each day that life was not the same as it had been the day before.

#1 Lesson: Prepare For The Future From The Unknown

L&C readied for their expedition with extensive food stores, medical and military supplies, scientific equipment and even a specially designed collapsible boat built. Lewis even spent months securing the latest knowledge from the most learned scientists of our country. However, a lot of their planning confirmed how they pictured their way west—similar to the east with slight variations. They were unconscious to their *already always* way of looking at the world.

L&C started out from a known point (St. Louis) and planned to end up at a known point (the mouth of the Columbia River). The only other place on the route whose exact location was known was the vast Mandan Indian village on the Missouri River, near present day Bismarck, North Dakota. By their standards, the Missouri River, their primary route of exploration, was largely uncharted. For L&C, all other places and routes along the journey’s path were substantially unknown. The Corps counted on receiving information and navigational guidance from trappers, traders, and Indians along the way to guide their course and often they had to backtrack.

While Native Americans and French trappers had charted and crudely mapped these areas, their methods were not understood and the American government had never deciphered them. Consequently, it was as if they never existed. “Acceptable” mapping methods of the time had *distance* as the critical measure while the Indian focus was the journey’s *experiences* within *time*. In reality, the Corps knew less about where they were going and how they would get there than when President Kennedy said America was going to the moon.

Associations use research to categorize the impact of their past initiatives. Studying this *data* will not necessarily provide *knowledge* for the future. Too often—it frames the past, connotes broad significance onto existing circumstances, and extrapolates that into future possibilities.

#2 Lesson: Failures Light the Way to Success

In the end, much of what L&C took was inadequate. Often they had to both improvise and acquire additional equipment, clothing, and food supplies. They would have starved without the charity of tribes along the route west and coming back east. Many tribes also shared their knowledge of future terrain.

The Corps of Discovery failed its primary mission to discover a water route to the Pacific Ocean. Moreover, the Great Plains were too dry for traditional agriculture and there was no part of the Missouri River system that could enable the U.S. to claim part of the Canadian prairie—another of Jefferson’s goals. The majority of the Corps scientific findings were not utilize for years after their return. Lewis died tragically, all the while believing he had failed. He had not.

In the fullness of time, the Corps has come to be regarded as a spectacular success. L&C enabled one of Jefferson’s visions for America: a coast-to-coast “Empire of Liberty.” The outcomes from their expedition far exceeded expectations in many unexpected ways. It was truly a voyage into America’s future.

The essence of a contemporary expedition is to discover uncharted territory while cultivating currently occupied territory. Successful associations do this by creatively talking about the future. They intentionally building participation into every member interaction and communication. Their leaders and staff model the future, by word and deed, before it is reality.

The *expeditionary model* and *mindset* of L&C is perfectly designed for today’s association circumstances, just as it was over 200 years ago when our nation was inventing itself.

New circumstances call for new words and for the transfer of old words to new objects.
Thomas Jefferson

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Future Lessons From Past Leaders — The Lewis & Clark Corps of Discovery

Part II. Expectations and Assumptions Can Kill Even the Best Idea

By Rhea Blanken, Results Technology, Bethesda MD.

As the 200th anniversary celebration of Lewis and Clark continues, extraordinary lessons from their expedition's successes and failures still provide food for thought:

The Iron Frame Boat...Looked Good on Paper

The men of the Corp called Lewis's collapsible boat *The Experiment* and it was. The boat design had it lightweight; easily carried by five men; and able to hold a ton of supplies. It required pieces of wood to support its shape, an outer covering made of animal skins, and pine tar as a waterproof sealant. The idea was ingenious. If only they had actually tested it.

In fact, multiple circumstances simultaneously occurred to defeat the imaginative design. For example—when they began stitching the 30 plus animal skins together to form the outer hull, their needles left holes larger than expected. Thus the outer sealing compound was more important than ever. However, since they expected pine trees to be in abundance and there were none to be found the sealant became the biggest problem. Their fall back plan, a mixture of charcoal, beeswax and buffalo tallow, proved to be no match for their circumstances. They later learned a design for boat construction from the Indians that accounted for sparse resources.

#3 Lesson: Patience in the Face of the Unknown

Did their expectation of having pine tar blind them to seeing their valued resource was gone? Could they have prepared a supply in advance? Did they ever question what they knew? How does your association examine its assumptions and scrutinize its expectations?

Consider our use of research and how we question the accuracy of our insights. We don't just ask, "What do we know?" We ask, "How do we know what we know?" or "How do we know that we know what we think we know?" These are not restatements of the same question. One evokes facts, myth, hope, and conviction. The second points to the sources for them, while the last questions the accuracy or limitations of the insights.

The Corps Journals...Content and Commentary

Today, the journals of Lewis and Clark provide a priceless glimpse into a world few of us can imagine. Theirs was a journey into *undiscovered* lands full of new cultural and mental landscapes. Jefferson wanted everything recorded so Lewis and Clark kept journals as did seven other Corps members. They conveyed gripping tales that still come alive whenever they are read.

But immediately after the expedition concluded, they were not read. They were not available to be read. While Jefferson wanted to digest all the details, it was several years before the journals' contents and commentary was made public. Lewis never actually completed preparing his journals for publication before his death. Was synthesizing his journals into a manuscript too over-whelming? Was he trying too hard to get it right, being too careful in his presentation?

It was 1807 before any of the Corps journals were published. It was 1814 before Clark's were in print. That was five years after Lewis died and ten years after the start of the expedition. Even then, many of the drawings representing the discovery of "new" animal and plant species did not receive proper recognition. Consequently, later explorers and expeditions re-discovered and renamed them. Odd since the Indians had already named them! Was the *Journey of Discovery* more committed to claiming and naming things than learning what the Indian already knew? Was the Corp less interested in *learning* and more focused on *telling*?

#4 Lesson: Practicing Partnership Maximizes Results

Since history is all perspective, many of the Corps journal entries were based on cultural and political assumptions. Nine different journalists recorded their thoughts on politics, diplomacy, women, geography, animals, military heroism, language, trade, property, curing the sick, health, and plants. Observations during their journey and their choices in presenting them have been of major influence in developing our country.

Do we encourage all who may be impacted by our actions and insights to participate and communicate? What obvious (and not so obvious) ways can we exponentially multiply our knowledge? What opportunities to be influenced by others are we avoiding?

To attain knowledge, add things every day. To attain wisdom, remove things every day.

Lao Tzu, Chinese Philosopher

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Future Lessons From Past Leaders — The Lewis & Clark Corps of Discovery

Part Three of Three

By Rhea Blanken, Results Technology, Bethesda MD.

Beyond the job description... Sacagawea's lasting contribution

Through examination of the Lewis & Clark Corps of Discovery's expedition, the reviewer cannot help but be impressed by the extra-ordinary partnership they demonstrated as co-leaders. The Corps itself persevered for well over two years in a unique partnership. At times, their logistical and resource choices may have been erroneous (based on incorrect assumptions and unconscious biases), yet the Corps learned to take advantage of even their failures as they moved the expedition forward.

They used their scouting, hunting, blacksmith skills and army experience to guarantee their survival every day. On their journey, they counted on receiving information and navigational guidance from trappers, traders, and Indians along the way to refine their course, gain knowledge of the wilderness and secure their survival. Several interpreters were enrolled for support.

#5 Lesson: Make Contribution Your Responsibility

While the Corps of Discovery carried the names of Meriwether Lewis and William Clark as co-leaders, Sacagawea is now the third best-known and recognized member of that expedition. She has more statues dedicated to her in the United States than any other American woman. Two sites along the expedition's path are named after her, Sacagawea River and Sacagawea Spring. In 2000, a US silver dollar was dedicated to her and in 2001, President Clinton named her an honorary sergeant in the regular army. It is considered likely that without her going above and beyond her job description of interpreter's wife, the Corps success would have been greatly reduced.

Lewis & Clark wanted her along from the moment Charbonneau, her French husband and guide, requested she accompany him on the journey. They knew that having a woman travel with a party of men was seen as a "token of peace" by Indians, assuring the Corp was not hostile even though they carried lots of firepower and were mostly made up of military men. They also assumed she would be invaluable when they reached the Shoshone Indians, since that was her native tribe. When they had their first formal meeting with the Shoshone Chief, she was the translator. The chief turned out to be her brother!

Sacagawea was invaluable from the moment the Corps left the Mandan Village—from her knowledge of edible roots and plants that provided food and medicine through out the expedition to rescuing irreplaceable papers swept overboard.

#6 Lesson: Job Descriptions Are Only Part Of What's Possible

Many other Indian women along the journey were of critical assistance and yet the observations recorded by the men represented women along their journey as second-class citizens. The roles and responsibilities they assigned them were far short of their actual capabilities and their expectations of value for the expedition initially underestimated.

Fixed in the Corps' mind was an interpretation of women that had Sacagawea and other native women's efforts invisible when they were actually extra-ordinary. Their writings and reports all too often represented unexamined biases rather than opportunities to experience full partnerships

with those along their journey. For example: the Corps did not know or realize that only Indian women, not the men, were allowed to touch the land— thus keeping the land uncontaminated. Gathering crops and searching for healing roots were *sacred* acts of women while the Corps saw drudgery. Women were also in control of their work and owned what they produced while women of the new democracy did not.

A good example of the unconscious bias the Corps had for roles and responsibilities—on the journey west, Lewis & Clark gave the men of the Mandan Village a corn mill as an act of friendship. As it was intended to advance the tribe's productivity, they mistakenly gave it to the men to use. But it was the women who planted, tended and harvested the corn before grinding it into meal. On their eastward return, the Corps stopped back through the Mandan Village. There they found the mill rusting and being used by the men for target practice. The Corps' gift to the Mandan tribe demonstrated limitations on their way of looking at world. The mill's value was defined within a certain set of roles and responsibilities.

It matters now more than ever how we encourage or thwart contribution from others eager to go beyond their roles or to expand their responsibilities. As broad social change continues and our society and culture expands, we must recognize our historic preconception and be prepared to modify them. Our convenient blindness to rigid governance structures and passé employment systems helps hinder initiative and innovation. The legacy Sacagawea embodied was one of team members empowering one another to go beyond expectations, for reaching beyond one's current position and not to limit contribution.

I have seen that in any great undertaking, it is not enough for a man to
depend simply upon himself. Lone Man – Teton Sioux

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