

Strategic Planning Terminology

Understanding planning terminology is key at the onset so that all participants grasp the common words and phrases.

Strategic Planning - A process to identify and set a roadmap for the organization. Participants should be visionary to position the organization. The plan's duration is generally 3 to 5 years. Most planning retreats require a day or two for a complete draft. The plan should be monitored regularly and reviewed at least annually.

Environmental Scan – A discussion of internal and external influences on the organization. Often frames with the acronym SWOT: internal strengths and weaknesses, external opportunities and threats.

Mission Statement – The mission statement is the purpose for existence. It identifies the organization, who it serves and what it offers. It should have PR value. Mission statements are frequently adapted from IRS Form 990, the bylaws or articles of incorporation.

Vision Statement - An aspiring statement to answer describing the desired outcome for the organization. It may focus internally, externally or both.

Values – The guiding principles of the board and staff.

Brand Platform – The combination of mission, vision and values statements make up the brand platform;

distinguishing the organization from others.

Goals – Synonymous with “objectives.” Goals are the core competencies, pillars or priorities of the organization. The planning process should result in three to seven goals. They should be **SMART**: **S**pecific, **M**easurable, **A**ttainable, **R**elevant, **T**imely.

Strategies – Strategies are continued and fresh approaches to achieve the goals. Generally a goal has 3 to 8 supporting strategies.

Tasks – The specific actions to achieve the strategies. Tasks will include assignments, deadlines and metrics. Committees manage the tasks.

Integration-Alignment – All aspects of the organization should align with the strategic plan. From the mission to the budget, the staff departments to the committees, every element is impacted by and works to advance the strategic plan.

Plan Champion – A person appointed to be responsible to report on and keep the plan in the forefront of meetings agendas and budgets. Some organizations prefer “Goals Champions” over plan champions.

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Start the planning process by discussing the terminology. This reduces frustration later in the process when directors begin confusing goals with strategies, mission with vision, etc.

Bob Harris, CAE - bob@rchcae.com