

## **Common Terms Used In Strategic Planning**

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Although many organizations generally accept the definitions and descriptions of some essential terms given below, other organizations may choose to define them differently. What is very important is that all members of a strategic planning group in any organization have a common understanding of key terms.

**Action Plans:** Action plans describe the selected action steps/strategies for accomplishing each objective. Action plans represent a major sub-part of the one-year tactical plan (also known as the annual operating plan) and include the annual or short range objectives, tasks or action steps for each objective, timelines for initiating and completing each task, budget for the task, success indicators, and the person or entity responsible for accomplishing each objective or action step.

**Action Plan Facilitator:** This is the person who facilitates and reports on action plans. This person sees to it that the action plan is written, accepted (by the Board of Directors), and carried out on time, on budget, and on quality.

**Annual Objectives:** The annual objectives (objectives for the coming year) are chosen so that when they are achieved, we advance toward achieving the strategic objectives as given in the strategic plan. Each annual objective can be broken down into action steps.

**Conversion Worksheet:** This is a useful tool for converting strategic goals and objectives into annual objectives for a one-year tactical plan. The conversion worksheets are designed to help the leaders and Action Plan Facilitators determine the portion of the total picture (the portion of the strategic goals and objectives) to be accomplished during the year, to help create an action plan for advancing toward strategic objectives.

**Environmental Scan:** This is an appraisal of the key outside trends and forces that influence the success an organization will have in achieving its mission and goals. These external trends and forces may pose either an opportunity or threat to the organization, such as changes in economic conditions, population, technology, environment, or statutes. This environmental scan is sometimes called an 'External Needs Assessment.'

**Evaluation:** This is a systematic procedure for comparing actual performance to planned performance and for using that information to improve subsequent planning cycles. Other terms used to describe this procedure include program evaluation, management evaluation, management audit, continuous improvement process, and performance feed-forward. (Blackerby associates, Inc.)

**Foundation Documents:** These are the statements that reveal who we are, what our aspirations are, and what values guide us. These thoughts are expressed in our vision, mission, and core values. Collectively, they are the foundation for everything that we do.

**VISION:** A vision is a concrete description, in present tense terms, of what your organization

will look like, function like, and be doing when it is operating at its ideal best. (Schwahn)  
A vision is a mental image or concept of a desired outcome to be achieved; a picture of what the team, organization, business, or enterprise should accomplish. A vision statement helps others imagine the accomplishment of the organization. (Albrecht)

**MISSION:** A mission is the ultimate purpose of your organization; the reason why you exist. It is a clear, concise statement of the fundamental purposes of an organization and is the foundation for developing the organization's goals and objectives. A mission statement answers the following four questions: (1) who are we? (2) What do we do? (3) For whom do we do it? (4) Why do we do it? (Lapin)

**CORE VALUES:** Core values are those values that are widely understood, publicly endorsed, and consistently acted upon by the organization and each of its members. (Schwahn)  
Core values are the few critically important values used to guide the organization in accomplishing its mission. The basic beliefs that guide a leader's actions; the things a leader and team members regard as important and worthwhile in connection with a particular enterprise. (Albrecht)

**Institutional Planning and Review Committee (IPRC):** At Central Penn, this committee is composed of all the action plan facilitators and peer group representatives.

**Long Range Planning:** Long range planning can be from 5 to 30 years, though most organizations engage in a 10-15 year look in to the future. Strategic plans typically look at a three to five year future.

**Milestones:** Major events, phases, or accomplishments - that must take place in an orderly fashion for the Strategic Objectives to be met (Van der Werff)

**Objective:** Objectives are the targets or the subparts of a goal. For a statement to be an objective, it must satisfy the following criteria: Specific, Measurable, Action-oriented, Realistic, and Time-targeted. (NDUS Strategic Plan)

**One-Year Operating Plan:** An important companion document to a strategic plan is the one-year operating plan (also called the annual operating plan) which serves to convert the strategic plan into short range, specific, achievable results. The purpose of a one-year operating plan is to "carve out" and implement that portion of the strategic plan to be accomplished during the coming year. The one-year operating plan, which is essentially the sum of the action plans, needs to be evaluated regularly. Because of the specific nature of its contents, it is a private document.

**Responsible Individual:** This is the person who is responsible for the action plan or specific task. It is an absolute necessity to have a responsible person identified in order to monitor the action plan and the outcomes.

**Strategic Goal:** Broad-brush strokes of intent - the overall desired result.  
([www.fusionproductions.com/tools/roi\\_objectives.cfm](http://www.fusionproductions.com/tools/roi_objectives.cfm))

Goals are usually general statements of direction and are not measurable. (Schwahn)

Goals provide the guiding direction for the team's efforts. Objectives are the intermediate targets for the sub-parts of the respective goals. (Dunn)

Strategic Objective: Specific, measurable actions that lead us toward achieving the strategic goal/s.

Strategic objectives are written statements that describe an intended outcome. They clearly describe measurable targets of achievement. (Blackerby Associates, Inc.)

Strategy: The course of action taken to achieve stated goals and objectives. (Humboldt County CFC Strategic Plan).

The strategy is not a document, but a process we follow to achieve our institutional goals.

Strategic Plan: When you ask: What are we going to do? you are talking about a strategic plan. Strategic planning is an outside-in approach that answers the question: What do we do? (Lapin).

The strategic plan consists of our foundation documents, strategic goals, and strategic objectives. The strategic plan is a public document. The one-year operating plan is a companion piece to the strategic plan and is a private document.

Strategic planning is a continuous and systematic process where people make decisions about intended future outcomes, how outcomes are to be accomplished, and how success is measured and evaluated. (Blackerby Associates, Inc.)

Success Indicator: Specific process or performance measure that is used to determine whether programs, services, or projects are achieving goals and objectives. (Humboldt County Strategic Plan).

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