

Glossary of Strategic Planning Terms

Many other definitions exist! The terminology is not important except to avoid misunderstandings; what matters is the improvement in the community as a result of the planning.

Accountability

The acceptance of responsibility for achieving planned results and wise use of resources.

Action or Implementation Plan

An assignment of specific timelines, responsibilities and preliminary resource allocations for the major tasks required by items within a higher-level plan.

Business Plan

An interim step some choose to do between a Strategic and an Operational Plan, focusing on financial viability over the medium term. Sometimes a misguided synonym for Operational Plan, coming from government or business people who do not realize that a nonprofit that “operates like a business” does not deserve nonprofit status, and who incorrectly think that businesses are more effective and efficient.

Clients, Consumers, Users or Constituents

Those whose lives your organization exists to improve; those whom the programs of the organization are designed to benefit.

Community

Those living within the geographic, professional, industry or special interest scope of your work, and the environment in which they live.

Community Benefit Organizations

Government, nonprofit, charity and social enterprise organizations and groups established for the primary purpose of benefiting their community rather than primarily existing to make a profit.

Community-Driven

An approach enabling Community Benefit Organizations to create significantly more impact in our communities through engaging and involving the whole community and working with the community’s priorities.

Community Engagement

The process of sharing power with the community being benefited through meaningful consultations, responsiveness, ongoing involvement and delegated decision-making.

Community Impact Plan

A plan for the future you want for your community, to make it amazing, and how that community will receive the maximum benefit from your organization toward achieving that future.

Continuous Planning

The process of integrating ongoing Environmental Scanning and flexibility into all decision-making and recommendations, rather than waiting for pre-determined time periods to elapse.

Environmental Scanning

Assessment of the factors that shape the external environment in which the organization operates, and in particular how changes in these factors may affect the organization.

Ethical Principles or Values Statement

The aspirational values that guide and inspire every decision and action at every level of the organization, each described in terms of what it means to the specific organization.

Five-Year Plans

A plan covering the next five years following the planning. A phrase that became archaic even before the end of the USSR, and never made sense anywhere.

Goals or Outcomes

Outcome statements that define what an organization is trying to accomplish in its programs and throughout its organization, with a long term perspective and an external focus. Outcomes can also be defined for shorter-term actions.

Long Range Planning

A periodic process of deciding on future organizational activity and forecasting its results based on a view that the world around the organization is predictable, current trends will continue and the organization is already in the right business.

Mission

A short description of the unique role your organization plays to help make the Vision a reality. It should state the purpose of the organization and who benefits. Referenced in all decision-making.

Objectives

Measurable, major activities that support achievement of one or more strategic directions.

Objects

The legal list of purposes as shown in the Letters Patent, Constitution or Bylaws. They cannot legally be exceeded. Supplementary Letters Patent are needed to change the Objects.

Operational Plan

A design for how and when the Strategic Plan will be achieved, usually over a one or two year period, including the alignment of an organization's policies, programs and resources with the Strategic Plan. Primarily a staff function if there is a Chief Staff Officer or management team.

Organizational Wellness

The degree to which the internal culture and capacity of the organization enable mission success, often with a focus on reducing stress, creating positive and productive workplaces, and assessing risks.

Owners

The people on whose behalf the Board of Directors (trustees) governs. In some organizations this group is also known as members.

Performance or Success Measures

The desired result of taking action on strategic directions.

Performance Objectives

An agreement between the organization and a staff member or volunteer that sets out targets and timelines that individual will achieve, directly or through others, usually over a period of three months to one year.

Planner

Anyone with significant input into the development of the process and content of the Strategic Plan.

Principal Activities

A summary of key current programs and services. Can be added to the Strategic Plan to help others understand what the organization does.

Scenario Planning

An organized way to consider possible outcomes of planned actions, so they can be modified to be more effective and manage risk.

Situational Analysis

An examination of the organization's strengths, weaknesses, life cycle stage/transitions in process and other aspects within an organization's control, in relation to the environmental scanning results.

Stakeholder

Anyone who directly or indirectly is affected by the organization, including clients, caregivers/family, suppliers, volunteers, staff, partner organizations, funders, governments and many others. Includes anyone who could be harmed by major changes or dissolution of the organization. May include proxy stakeholders for animals, the environment and individuals who cannot communicate.

Strategic Action Plan

A board-level document to enable implementation of the Strategic Plan through focussed action and results monitoring.

Strategic Directions or Priorities

Broad, overall priorities or directions adopted by an organization, to guides what to focus on in the immediate future, and therefore how to allocate resources, in priority order; Strategic Directions are usually worded in a more action-oriented way than Strategic Priorities.

Strategic Plan

A formal public document summarizing Board decisions about the how the organization will help achieve desired outcomes for its community over the next few years.

Strategic Planning

A systematic process through which an organization agrees on, and builds commitment among key stakeholders to, its reason for existence and which current priorities are both essential to that purpose and responsive to the environment. Sometimes described as the most important function of a Board of Directors.

Strategic Planning Facilitator

The person helping internal planners develop and implement a customized strategic planning process, develop the plan and develop a design for implementing that plan. May include additional preparatory work such as stakeholder consultations.

Strategic Thinking

An ongoing process to constantly reason, challenge and express ideas from a strategic perspective, considering every decision for why it matters and with respect to the organization's mission, vision and values.

SWOT

An acronym for a Strengths, Weaknesses, Opportunities and Threats exercise designed to sap all energy and enthusiasm at the start of any planning process then never be looked at again. An intentional way to thwart meaningful change. An analysis not even potentially meaningful before Vision and Mission have been agreed upon but sometimes of internal benefit in later stages of planning.

Targets

Desired qualitative and quantitative results within time lines that support the achievement of a Strategic Direction and can be monitored objectively.

Vision

A very brief description of the desired community the organization will help to create, with no reference to the organization.