

## Strategic Planning Terminology

Awareness of *planning terminology* is key at the onset so that participants agree upon the common words and phrases.

**Strategic Planning** - A *process* to identify, discuss and set outcomes for the organization. Participants should be visionary in understanding and setting a realistic course to best position the organization. The timeframe may cover a year to 10 years, though two to three year plan duration is common.

**Mission Statement** – The mission statement is the foundation of the organization’s existence and operations. It identifies the organization, the members or audiences, and the services, in one to three precisely worded sentences; also serves a public relations need. Mission statements are frequently found in or adapted from the bylaws or articles of incorporation.

**Vision Statement** - A lofty statement that answers: "What and where do we want to be in the distant future?" In writing a vision statement, consider that you have unlimited resources and thus you can take the industry or profession in the best direction to meet their needs. For example, "XYZ organization will be the premier organization in the state to serve the needs of all professionals."

**Values** - Core values are consistent with the mission. They inform audiences of the organization’s principles. It is better to adopt a value statement than to amend the mission, vision or bylaws.

**Goals and Objectives** – The terms are synonymous. Goals are the major thrusts for the organization. The planning process should result in three to

seven goals. They should be *SMART*: **Specific**, **Measurable**, **Attainable**, **Realistic**, and **Timed**.

**Strategies** – Strategies fall under goals. While the goals indicate direction for the organization, the strategies more specifically identify directives for achieving the goals. From a PR perspective, the strategies will be judged as to what actions the organization will be undertaking to benefit the members.

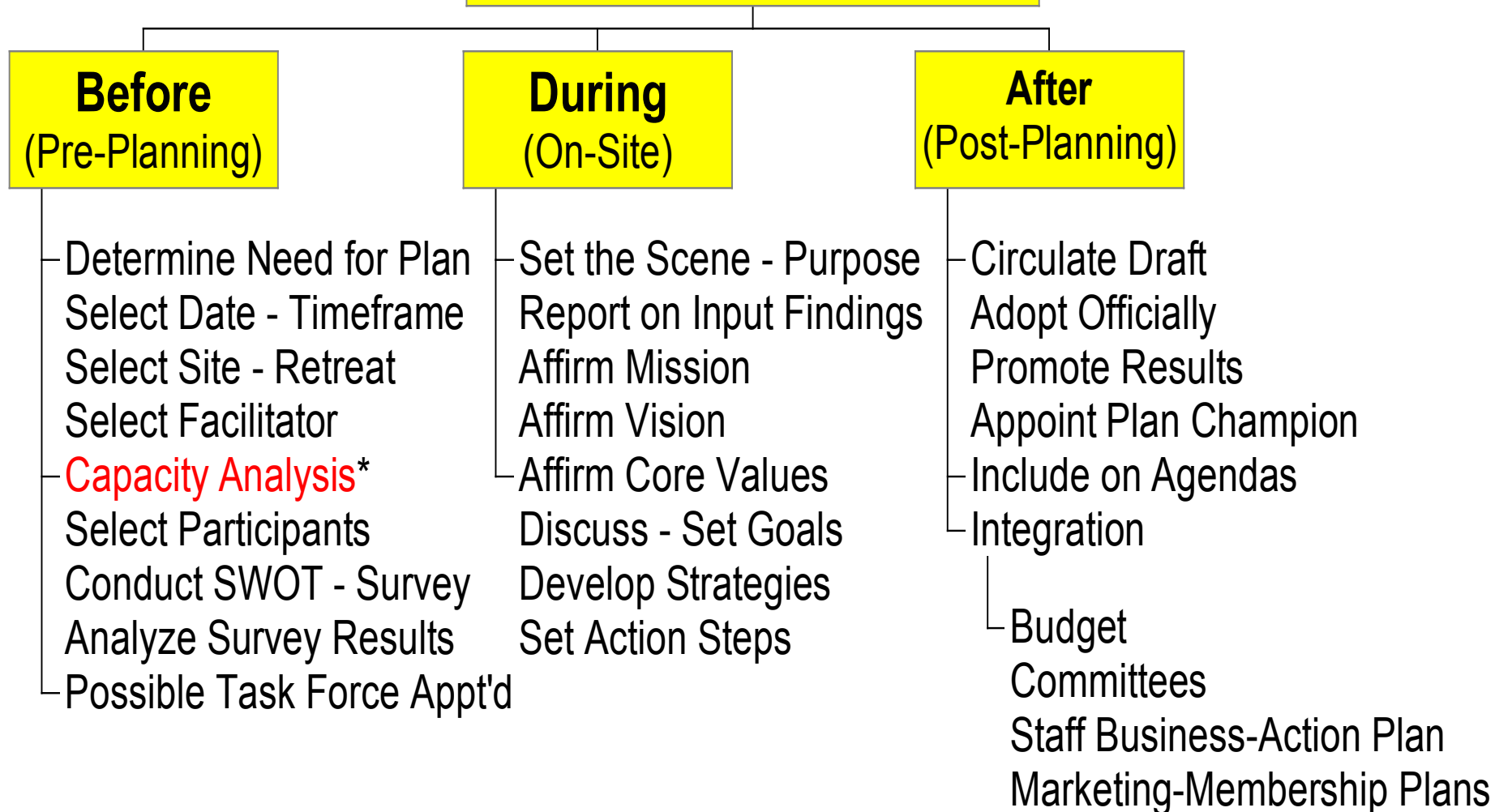
**Action Steps** – Action steps are very specific to achieve the strategies. Action steps take into account deadlines, quantifiable specifics, persons committed to doing the work, outsourcing, resources, etc. Plans often fail that do not include action steps set by the planners or the staff.

**Integration-Alignment** – The organization’s budget and committees may need to be re-aligned with the goals of the strategic plan. Many organizations appoint only committees that support the goals, i.e. seven goals, seven committees.

**Public Relations** – The final process of strategic planning will include telling constituents, allies and others the results of the strategic plan. An important aspect of the strategic plan often neglected.

**Plan Champion** – A person appointed to be responsible to report on and keep the plan in the forefront of meeting agendas and budgets.

# Strategic Planning Process



Note: **Capacity Analysis** refers to organization's ability to achieve mission and goals with existing resources, committees and staff. Goals and strategies *must* be realistic, achievable, and measurable. **Integration** with budget and committees is critical. Additional nonprofit resources available free at [www.nonprofitcenter.com](http://www.nonprofitcenter.com). For strategic planning, board orientation and seminars contact Bob Harris, CAE, at 850/570-6000 or [bob@rchcae.com](mailto:bob@rchcae.com)

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