



## Strategic Planning Training Definitions and Overview

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This document provides a list of common terms and their definitions related to Strategic Planning. The purpose of this document is to create consistency in the use of these definitions across departments for the development of the MITW 2023 Strategic Plan.

### Strategic Planning:

This term has many definitions. Broadly, the term strategic planning can be defined as the means through which an organization or community sets out the goals it wishes to achieve, and the steps it will take to reach those goals. To be effective, strategic planning involves both short-term and long-term planning. Long-term plans can be used to set out a goal, and the steps and resources required to accomplish that goal. Short-term plans can be used to describe in greater detail how the long-term plan will be put in place over a specific period. They can also be used to set out the specific steps required to accomplish a specific component of the long-term plan.

Strategic Planning is a tool for organizing the present (NOW – Strengths and Weaknesses) based on the projections of the desired future (FUTURE – Opportunities and Threats). It is a road map to lead an organization from where it is now to where it would like to be in the future – 5 years; 10 years, etc. The most effective strategic plans are simple, easy to follow, clear and concise; and based on the current situation.

### Vision:

A clear sense of purpose that is future-oriented. Vision (statement) The vision is a vivid and compelling description of the organization and its customers/clients at some time in the future.

**VISION = WHY WE ARE HERE.**

### Mission:

Gives the vision momentum. It defines What, Who, and Why. It is a statement by the organization that explains the reason for its existence. It is a broad statement that encompasses the diversity of the community. The statement is not precise in its measurements, nor does it need to be, but it does need to be periodically reviewed to see whether it still encompasses all relevant activities of the Tribe.

**MISSION = HOW WE WANT TO BE PERCEIVED.**

The mission statement describes the overall purpose of the organization. The statement can vary widely in terms of content and scope.

### Values:

Values (statement). Principles, beliefs, and standards that an organization considers important and that guide its decisions, behaviors, and actions. They are the foundation of an organization's culture and provide a framework for decision-making. The values statement describes the overall, top-level priorities for how an organization chooses to conduct its activities and to be viewed by the public, for example, integrity, efficiency, and reliability.

**VALUES: WHAT OUR BELIEFS ARE.**

Definitions

GOALS, OBJECTIVES, and STRATEGIES:

HOW WE GET THERE.

**Goals:**

A broad statement of purpose that describes the expected long-term effects.

A goal is a specific accomplishment to be achieved at some point in the future. Planners often distinguish between several types of goals in the strategic planning process. In nonprofits, an outcome’s goal is regarding the accomplishments of clients who participate in a particular program. Outcomes are changes in knowledge, skills, and/or conditions for the clients. An activity’s goal contrasts with an outcomes goal and is regarding actions to be accomplished by the organization. An organization-wide goal is an overall accomplishment of actions across the organization and often involves more than one program. A product or program goal is an overall accomplishment of actions in a specific product or program. The goal can be an activity’s goal or an outcome’s goal.

**Objectives:**

The measurable approaches and mileposts needed to achieve each goal. For objectives to successfully support the goals, they need to be SMART:



The formula for writing SMART Objectives is: (Verb noting the direction of change) + (area of change) + (target population) + (degree of change) + (time frame)

Types of objectives include changes in behavior, performance, process, or product.

**Objectives Checklist:**

Specify	Describe	Tell	Emphasize	Relate	Make	Allow
Always specify a result, not an activity	Describe just one result you want to accomplish	Tell when the result is to be accomplished	Emphasize what will be done and when, but not why or how it will be done	Clearly relate each objective to one or more of the goals	Make sure the objectives are specific, measurable, and verifiable	Allow for flexibility on the part of those implementing the objective

**Strategies or Activities:**

The plan or approach an organization takes to achieve its goals and objectives. It is a set of actions, tactics, and initiatives designed to bring the organization closer to its vision.

## ADDITIONAL STRATEGIC PLANNING TERMS:

### ***Affinity Process:***

A process for gathering information that allows a team to creatively generate many ideas/issues and then organize and summarize natural groupings among them to understand the essence of a problem and breakthrough solutions.

It encourages creativity by everyone on the team at all phases of the process; breaks down communication barriers; encourages connections among ideas/issues; encourages “ownership” of results that emerge because the team creates both the detailed input and general results; and overcomes “team paralysis” which is brought on by an overwhelming array of options and lack of consensus.

### ***Baseline Data:***

A set of data that serves as a starting point or reference point for measuring progress toward achieving goals and objectives. Baseline data provides a snapshot of the current state of an organization's activities, operations, and performance. Baseline data is typically collected through research, surveys, or assessments before implementing a strategic plan. It provides a clear picture of the status of the organization and helps to identify gaps and areas for improvement.

Baseline data can be used to establish performance metrics and targets for measuring progress toward achieving goals and objectives. It can also be used to compare performance over time and to track changes in performance resulting from strategic initiatives. It helps organizations to set realistic goals and objectives, allocate resources effectively, and monitor progress toward achieving their desired outcomes.

### ***Consensus:***

In the context of strategic planning, consensus implies that all relevant parties, such as executives, managers, department heads, and sometimes even external stakeholders, have been actively involved in the planning process and have had the opportunity to provide input and feedback. Through open communication, collaboration, and negotiation, the consensus is achieved when these individuals come to a general agreement on the strategic objectives, initiatives, and overall path forward for the organization.

### ***Evaluation:***

The process of systematically collecting and analyzing data to determine the effectiveness of an organization's activities, strategies, and initiatives. Evaluation can help organizations learn from their experiences and improve their performance over time.

### ***Impact:***

The broader and long-term effects of an organization's activities on its stakeholders and society. The impact can be positive or negative and can be measured in terms of social, environmental, and economic outcomes.

### ***Inputs/Resources:***

The resources, assets, and capabilities an organization requires to achieve its goals and objectives. Inputs may include financial resources, human resources, physical assets, information, and technology.

***Financial Resources:*** The financial capital an organization needs to invest in its activities, such as funding for research and development, capital investments, marketing, and operating expenses.

***Human Resources:*** The people within an organization who provide the skills, expertise, and knowledge required to achieve its goals and objectives. This includes employees, managers, and executives.

## Definitions

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**Physical Assets:** The tangible resources that an organization owns or leases, such as buildings, equipment, and machinery. These resources are used to produce goods and services.

**Information:** The data, knowledge, and insights an organization requires to make informed decisions. This may include market research, community feedback, competitor analysis, and trends.

**Technology:** The tools, systems, and processes an organization uses to support its activities. This includes software, hardware, and communication networks.

**Capabilities:** The unique strengths, skills, and competencies an organization possesses that differentiate it from its competitors, including specialized knowledge, unique processes, and strategic partnerships.

### ***Key Performance Indicators:***

Key Performance Indicators are metrics used to measure progress toward achieving goals and objectives. They provide a way to track performance and identify areas for improvement. Specific and measurable variables that provide evidence of progress towards achieving outcomes. Indicators can be quantitative or qualitative and can be used to track changes over time.

### ***Outcomes/Results:***

Outcomes are changes in behavior that result from participating in a program. Outcomes can be short-term (usually changes in knowledge), intermediate (changes in skills), and long-term (changes in conditions). Outcomes are the real results or accomplishments that the community expects.

The results or impacts of an organization's activities, strategies, and initiatives. Outcomes can be positive or negative and can be measured in terms of effectiveness, efficiency, and impact.

### ***Outputs/Activities:***

The tangible and intangible products or services produced because of its activities. Outputs are the direct results of an organization's work and can be measured in terms of quantity, quality, and timeliness.

### ***Timeline:***

A structured and time-bound process that is used to develop and implement a strategic plan. The timeline outlines the key stages, activities, and milestones involved in the strategic planning process.

A typical strategic planning timeline may include the following stages:

- **Pre-planning:** This stage involves conducting research and analysis to gather baseline data, define the scope of the strategic plan, and establish the strategic planning team.
- **Development:** This stage involves drafting the strategic plan, including the organization's mission, vision, values, goals, objectives, and strategies.
- **Review:** This stage involves obtaining feedback and input from stakeholders and refining the strategic plan accordingly.
- **Approval:** This stage involves obtaining approval from the organization's leadership team.
- **Implementation:** This stage involves putting the strategic plan into action, including allocating resources, implementing initiatives, and monitoring progress toward achieving goals and objectives.
- **Evaluation:** This stage involves regularly reviewing and assessing the effectiveness of the strategic plan, adjusting as needed, and reporting progress to stakeholders.