

## MANAGANCE STRATEGIC PLANNING VOCABULARY

**Mission Statement:** Statement that conveys in a concise and compelling way the difference the organization is aiming to make in the world. Stakeholders want to be part of making this happen and they want the organization to be remembered for this.

**10-Year Vision Statement:** Statement about what an organization will “fight” to make different through its work and influence and how the organization itself aspires to be in a decade. The idea is to push strategic thinking out far enough that it is not tightly constrained by the current environment and capacities. Components include: 1) Some specific result or change the organization is pushing to achieve 2) How big is the reach or scope of the work 3) Growth and depth of organization capacity and assets 4) Who are the biggest partners and 5) What are major financial sources.

**Core Operating Values:** Fundamental values or ideals at the heart of an organization. They articulate behavior the organization holds itself accountable to in its operations and they offer guidance about the quality and type of experience the organization wants its customers have and to expect.

**Theory of Action or Guiding Principles:** Set of beliefs about the world that frames an organization’s work. These beliefs inform the approach to the work or why an organization chooses to tackle problems or issues in a certain way. Sometimes referred to as guiding principles, a “theory of action” explains why an organization believes that the actions it takes will have the desired results.

**Customers and Partners:** Primary customer is the group of people or things that an organization has an on-going exchange with everyday; the organization’s programs and services are organized to respond to the needs, wants and aspirations of this customer group. The primary customer can be an individual, organization, animal or thing and it can change overtime. For some organizations that work through partners, the primary customer may be individuals or organizations that they work through to reach the beneficiaries of their mission. For other organizations the primary customer is the actual beneficiaries of the work. Supporting customers are all the people who must be satisfied in order for the organization to succeed. There can be many supporting customers. They are extremely important, but they are not the primary customer. They are engaged with the organization because of and in order to support the accomplishment of the mission. Supporting customers can also expand and change over time. Identifying distinguishing characteristics of an organizations customers helps put priorities in order and creates a point of reference for critical decisions.

**Environmental Scan or Market Analysis:** This is an information gathering process for discovering and documenting facts, trends and position of an organization in its operating environment that are likely to affect the organization in its future work. Scan findings orient participants in strategic planning to the context that is informing strategic direction decisions.

**Organizational Culture:** The pattern of basic assumptions that has worked well enough to be considered valid and, therefore, to be taught to new members as the correct way to perceive, think, and feel in relation to those problems. All organizations have three levels of organizational culture: 1) Artifacts are the things and processes that we can see, 2) Espoused Values & Beliefs are what people say, and 3) Underlying beliefs and assumptions are in an organization’s unconscious.

**Strategic Direction:** A succinct statement about the strategy or approach an organization will take toward its work for a specific period of time. The statement is based on a combination of both the current environment (the opportunities and threats facing the organization) and the mission and competencies of the organization. It is developed in direct response to the strategic questions asked by an organization during strategic planning and grows out of building a set of alternative direction “what if” scenarios and analyzing them against a range of objective criteria.

**Goals and Objectives:** Goals and objectives set out the broad results that the organization hopes to achieve within a specific time period (goals) and statements of shorter term results and collections of activities (objectives) which if achieved will constitute and achievement of the goals.

**Action Planning:** Process to identify major action items an organization will implement to accomplish the objectives in the strategic plan. Action planning includes working through alternative ways of implementing the objectives, assigning responsibility and defining budget implications.

