

Definitions of Terms Used in Planning

Featured Terms in Jefferson County Planning Efforts

- Purpose: The mission, aim, need, primary concern, function of or results sought from a system. A purpose is *what* the system is to accomplish, with no emphasis on *how* it is to be accomplished.
- Mission: A clarification of an organization's purpose, or *why* it should be doing what it does. An organization's mission is the foundation of its vision of success.
- Values: Beliefs; societal, organizational and individual aspirations; and desired end states.
- Strategic Issues: Fundamental policy questions or critical challenges that affect an organization's mandates, mission and values; product, service level or mix; clients, users or payers; or cost, financing, organization or management.
- Vision: An object of imagination. A manifestation to the senses of something immaterial. In planning, the perception or imagining of a desired end state, as yet unachieved, and its expression in the form of a narrative description, picture, recording, plan, model, etc.
- Vision of Success: A statement of *what* an organization should look like and *how* it should behave as it fulfills its mission.
- Strategy: A pattern of purposes, policies, programs, actions, decisions or resource allocations that define what an organization is, what it does and why it does it. Strategies can vary by level, function and time frame. Strategies are developed to deal with strategic issues.

Terms Used in Many Ways

- Objectives: 1) The "object" of a course of action; something to be worked for or striven toward. (2) The criteria for determining how well a value is achieved. Objectives and goals operationalize values for specific situations. (Some organizations interchange the meanings of goals and objectives.)
- Goals: The performance levels or amount of an objective to be attained within a specific time and cost limits. Objectives and goals operationalize values for specific situations. (Some organizations interchange the meanings of goals and objectives.)

Other Term

- Principles: "An accepted or professed rule of action or conduct."

Approach—A mode of conduct directed in a given way toward a particular set of circumstances. An approach consists of principles of action and a methodology for operationalizing them. An approach may be comprised of several or many steps, and may employ a variety of tools, techniques and skills to carry out its various steps.

Champion (or process champion)—A person or group who believe in and commit to the planning process. Champions provide the energy and commitment to follow through, and are usually the people who have primary responsibility for managing the strategic planning process from day to day. They model the kind of behavior they hope to get from other participants, and are “cheerleaders” who, with sponsors, keep the process on track and push and encourage the strategic planning team and others through difficult spots. They may or may not be the initiators of the planning process. The role of “champion” is different from the role of “sponsor” (q.v.), even though sometimes champions and sponsors may be the same people.

External environment—The outside environment in which an organization operates, often analyzed in terms of the opportunities and threats present and anticipated in the organization’s environment. External environment factors include forces and trends, key resource controllers, competitors and collaborators. The relationship between what is considered the external environment and what is the internal environment is often fluid.

Facilitate—To free from obstacles and difficulties; make easier; aid, assist or help bring about. More specifically, to make use of appropriate group and individual process skills, techniques and tools to assist or enable a group to implement an approach.

Generate-organize-select—A three step “mini-process” that occurs in many of the steps in the strategic planning approach. A group may use various tools to generate values, ideas, solutions, measures, issues, strategies, etc. Other tools and techniques are used to organize what is generated into meaningful and more useful forms or formats. Tools of a third type are used to choose or select what items or actions actually become parts of the strategic plan.

Goals—The performance levels or amount of an objective to be attained within a specific time and cost limits. Objectives and goals operationalize values for specific situations. (Some organizations interchange the meanings of goals and objectives.)

Implementation—To give practical effect to; to insure actual fulfillment by concrete actions.

Initial agreement (or “Plan for Planning”)—An initial agreement among key internal decision-makers or opinion leaders (and sometimes key external leaders) on the purpose and worth of the overall planning effort, who should be involved in the planning effort and how they should be involved, the specific planning steps to be followed and the timing of reports. As the planning effort gets underway, amendments to the initial agreement or new agreements incorporating new participants, etc. are often needed.

Internal environment—The environment within an organization, often analyzed in terms of strengths and weaknesses. Internal environment factors include resources, current strategy and performance. The relationship between what is considered the internal environment and what is considered the external environment is often fluid.

Mandate—Formal and informal requirements placed on an organization or program. Although some mandates may be imposed internally, through such things as articles of incorporation, the strategic planning approach focuses primarily on mandates, formal and informal, imposed by external sources.

Mission—A clarification of an organization's purpose, or *why* it should be doing what it does. An organization's mission is the foundation of its vision of success.

Mission clarification—Aims to specify the organization's purposes and the philosophy and values that guide it.

Objectives—(1) The "object" of a course of action; something to work or strive toward. (2) The criteria for determining how well a value is achieved. Objectives and goals operationalize values for specific situations. (Some organizations interchange the meanings of goals and objectives.)

Operational—Relating to the operation of an organization. Non-strategic.

Plan—A detailed formulation of a program of action.

Plan for Planning—See *Initial Agreement*.

Purpose—The mission, aim, need, primary concern, function of or results sought from a system. A purpose is *what* the system intends to accomplish, with no emphasis on *how* it is to be accomplished.

Skill—A developed aptitude or ability. The ability to use one's knowledge effectively and readily in execution or performance, especially in the application of techniques.

Sponsor (or process sponsor)—A person or group who legitimize the planning process. Sponsors are typically top leaders. They have prestige, power and authority to commit the organization to strategic planning and to hold people accountable. They are not necessarily involved in the day-to-day details of the planning process (this is the role of "champions"). Sponsors typically have a vested interest in a successful outcome, and are important sources of knowledge about strategic issues and how the planning process should time itself with key decision points. The role of "sponsor" is different from the role of "champion" (q.v.), even though sometimes sponsors and champions may be the same people.

Stakeholder—Any person, group or organization that can place a claim on an organization's attention, resources or output, or is affected by that output.

Strategic—Relating to or marked by strategy. Very important. Relating to an organization's mission, values, mandates and vision.

Strategic issue—Fundamental policy questions or critical challenges that affect an organization's mandates, mission and values; product, service level or mix; clients, users or payers; or cost, financing, organization or management.

Strategic plan—A program of action that addresses an organization's strategic issues. Strategic plans usually incorporate the purposes and values of the organization, sometimes expressed as a mission statement; an identification of strategic issues; a strategy or strategies for addressing the issues, a vision of the organization in the future and an implementation plan.

Strategic thinking—The application of the principles and process of strategic planning to everyday planning and decision-making. Approaching decision-making with regard to the organization's mission, values, mandates and vision.

Strategy—A pattern of purposes, policies, programs, actions, decisions or resource allocations that define what an organization is, what it does and why it does it. Strategies can vary by level, function and time frame. Strategies are developed to deal with strategic issues.

Strategy change cycle—A process for strategic planning and management. It includes: setting the organization's direction, formulating broad policies, making internal and external assessments, paying attention to the needs of key stakeholders, identifying key issues, developing strategies to deal with each issue, planning review and adoption procedures, implementing planning, making fundamental decisions, taking action and continually monitoring and assessing the results.

Strategy reassessment—A review of strategies and the strategic planning process, which is conducted once implementation is underway, often as a part of the implementation process itself. Strategy reassessment is a prelude to a new round of strategic planning.

SWOC analysis (also SWOT where T = threat)—An analysis of an organization's internal and external environments, in which strengths and weaknesses (internal) and opportunities and challenges (external) are identified and assessed.

Tactical—Relating to small-scale actions serving a larger purpose or mission, carried out with a more limited or immediate end in view.

Timeline—A means for allocating, organizing, and inter-relating blocks of time for designated activities. A tool for the same, making use of phases, milestones, deadlines, etc. to guide the planning, implementation, evaluation or other process.

Tool—A means for performing an operation or necessary in the practice or vocation. More specifically, the means, process, by which an individual or group achieves the purposes and accomplishes the tasks necessary to complete a step in the strategic planning process. Tools can be grouped by what they do, e.g. tools for generating ideas, tools for organizing ideas and tools for selecting ideas.

Values—Beliefs; societal, organizational and individual aspirations; and desired end states.

Vision—An object of imagination. A manifestation to the senses of something immaterial. In planning, the perception or imagining of a desired end state, as yet unachieved, and its expression in the form of a narrative description, picture, recording, plan, model, etc.

Vision of success—A statement of *what* an organization should look like and *how* it should behave as it fulfills its mission.

Using a strategic planning vocabulary

Selected terms

- Strategic
- Operational
- Issue
- Strategy
- Sponsor
- Champion
- Mission
- Vision
- Objective
- Goal

Rules for using terms

- Each concept in the planning process must be covered by a unique, defined term.
- A term may not be used to describe more than one concept.
- Terms must be used consistently to mean the same thing by all persons involved in the planning effort.