



## Strategic and Operational Planning Definitions

These components are often confusing and definitions of each may vary. To eliminate confusion and to increase the understanding of each of the components of the strategic plan, I have provided descriptions below.

### Vision

The vision describes the organization and its potential impact in the future. A vision is guided by dreams, not constraints. It is what an organization hopes will happen if its dreams are realized. Vision inspires and directs all aspects of the organization including fundraising. Vision is the force that results in the long-term engagement of donors and volunteers.

### Core Values

The core values statement describes what the organization truly believes in. These core values guide the way the agency works with others internally and externally. Core values are those values the agency will strive to uphold whether or not they are rewarded.

### Mission

Mission has two elements: the philosophical expression of the values-based need the organization meets in the community (why the organization exists), and a brief summary of what the organization does to meet that need.

### Goals

A goal is the principal program or other major accomplishments the organization hopes to achieve in order to realize its vision and fulfill its mission. They are evaluated annually.

**Example:** To provide education and training in proper nutrition to clients receiving meals at senior centers.

### Strategies

A strategy is the overall design or principal methodology that the organization uses to achieve the identified goal.

**Example:** To design 3 experientially based nutrition training and education programs.

### Objectives

Objectives support the goals and strategies and provide more details – they answer the question: who will do what by when?

When developing objectives, remember that objectives are “SMART:”

**Specific** – pertaining to a certain task or program;

**Measurable** – quantifiable by date, outcomes, responsibility;

**Attainable** – doable within the time prescribed and with existing constraints;

**Results-oriented** – focused on short-term activities to gain longer term goals; and

**Time-determined** – a time frame for completion is established.

**Example:** By (month, day, year), educational staff (who) will develop a 30-minute nutrition program, (what) using audiovisual materials and lecture format, for pilot delivery at the NYC Senior Center.

### About Beth Applegate, Principal

**Beth Applegate** is the principal of Applegate Consulting Group (ACG), an organization development (OD) practice that assists national and international nonprofit organizations, government agencies and socially responsible for-profit corporations with developing human and organizational capacity and building a more just and equitable society. Our work is inextricably linked to advancing democratic processes and humanistic values. Beth Applegate can be reached at [Beth@applegateonline.com](mailto:Beth@applegateonline.com).