Terminology

**Strategic Plan**
A document guiding an organization for several years. Serving as a roadmap for leadership, staff, budgeting, committees and chapters.

**Mission**
The reason for existence; the purpose statement considered by internal and external publics and yearly by the IRS.

**Vision**
The inspirational statement defining success for the organization.

**Values**
Guiding principles embraced by the leadership and staff.

**Goals**
Core competencies and broad objectives of the organization.

**Strategies**
The programs and projects identified to support the goals.

**Tactics**
The lowest level in the strategic plan, identify specific details of delegation, deadlines and performance measures.

**Action Plan**
The transformation of the strategic plan into an annual guide of committee and staff assignments; also called the yearly business plan or plan of work.

**Planning Team**
The persons responsible for developing, monitoring and updating the strategic planning.

**Environmental Scan**
An analysis of the influences on the organization likely to affect the strategic plan. SWOT: Strengths, Weakness, Opportunities and Strengths.

**Capacity**
Reality that an organization has limited resources in the form of workforce (volunteers and professionals) and budget.

Note: Planning processes and strategic plan reports will vary. Not every aspect herein will apply to every organization.
### Strategic Plan Scorecard

Use the scorecard to evaluate the strategic plan and its value in guiding the organization over several years. Apply a grading scale of A to F, including +/- (i.e. C-). Note: Planning processes and strategic plan formats vary. Not every aspect herein will apply to every organization.

#### Alignment
The plan should align with key elements in the organization – budget, committee work, board agendas, staff departments, chapters, etc. Some plans are developed at a retreat but never integrated --- leaving the plan as a stand-alone document. Rate how well the plan is integrated and aligned within the organization.

#### Elements
A plan has key elements: (1) mission, (2) vision, and/or (3) values statements, (4) goals, (5) strategies and (6) actions and/or performance indicators. Rate the existence of these elements and their perceived quality.

#### Clarity
The plan should be easy to understand, apply and monitor. Some of the best plans are communicated in just a few pages. Rate the ease in reading and using the plan as a guide.

#### Span
A plan generally covers 3 to 5 years. Annually it should be reviewed for progress. Rate if the plan’s usefulness has lapsed or it is still an effective roadmap with annual reviews.

#### Prioritization (long-term)
Everything cannot be achieved in the first year of the plan. If the plan covers three years, for instance, then priorities should be determined. Rate the effectiveness of prioritizing goals and strategies over the span of the plan.

#### Action/Deployment (Short Term)
To delegate and trace the work, many organizations transform the strategic plan into a 12-month action or business plan for staff and committees. It may take the form of a matrix or table setting assignments, accountability and deadlines. Rate how well the strategic plan has been transformed into an action plan to guide current year efforts.

#### Goals
Strategic plans frequently set just 3 to 7 goals (sometimes considered “core competencies.”) Each goal should be supported by several strategies to achieve the goal. Rate the number of goals and whether or not they are supported by clear strategies. Are any major programs missing from the plan?

#### Awareness
Appropriate stakeholders should be aware of the strategic plan. Has the plan been communicated into a promotional brochure, on-line document and/or used in the newsletter? Rate how well the plan has been communicated to stakeholders (i.e. members, allied organizations, government, chapters, suppliers, etc.)

#### Social Responsibility
Most nonprofits are organized to advance a cause or support a community. This should be evidenced in the mission, stated values (i.e. ethics, standards, and stewardship) and through effective programs of work. Rate whether or not the organization maintains a recognized role in community enhancement and societal benefit.

#### Extra Credit!
What elements make your organization’s plan exceptional?