

ADVISORY

COMING TO TERMS: KEY PLANNING DEFINITIONS

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When planning in your school an important goal is to develop a common language. People come to the school and strategic planning from many different backgrounds and experience and based on these contexts, there may be disagreement on operational definitions for common planning elements. A common language levels the playing field and enables everyone in the school community to participate in the development of a strategic plan and understand his or her role in it. So that when the when the English Department Chair and the head of the middle school are working on a strategic initiative together their meanings around goals, strategies, objectives and outcomes correspond to those College Guidance and Admissions are working on halfway around campus.

We have found that there are several key words that separately and together carry different meanings for different people, and consequently can become a barrier to strategic thinking. This is particularly true of the words mission and vision; goals and objectives; and strategies and tactics. We have incorporated current management thinking into the following definitions and distinctions not as a final word but as a launch pad to create clarity, consistency and consensus when your school uses these essential terms in its planning.

10 Must-Know Planning Terms

1. **Core Values: What are they and why are they important?**

Core values are the heart of the school. They are what the school stands for, what it holds dear, what it believes in. Core values inform both mission and vision and as such are indispensable to strategic planning. Core values are often ‘unpacked’ in a group of several statements that begin with phrases such as “we believe,” “we care about,” “we value,” or “we commit to.” These statements express what it means to live each value in in relationships, decision-making, and service delivery. We cannot get people to “buy into” our values. We can only seek people who are predisposed to share them.

2. **Vision: What is it and why do we need it?**

Vision is an image or description of the school community you aspire to become in the future. It answers the question “If we could create the school of our dreams and have the impact we most desire, what would we look like in the year 20XX?”

Vision statements are the result of mission statements added to core values and bold goals. Vision statements build community, inspire action and get everyone working together toward the same



outcome. Vision statements help organizations soar. Mission statements keep them grounded.

3. **Mission: What is it and how does it relate to vision?**

While a vision statement is directional and answers the question “Where will we be in five years?” a mission statement is foundational and states the purpose of the school’s existence. It answers the question “why do we do what we do?”

The school mission statement should emerge from core values and be enduring, typically lasting for the lifetime of the school, with small adjustments along the way to make it congruent with school vision. Unlike mission statements of the past, which often seem have everything in them but the proverbial kitchen sink, and fail to differentiate The school from neighboring competitors, today’s mission statements dwell less on the “what” schools do than the “why” they do it. By seeking the ‘why’ as it emerges from core values a school can claim its points of distinction and better communicate the “experience” it offers as opposed to the “product.”

4. **Goal: Can I measure it? How is it different from an objective?**

A goal is a broad statement of what the school hopes to achieve and is qualitative in nature. The school can have short-term and long-term goals. It seeks to set **clear goals** and **measurable objectives**. Goals supported by initiatives that have measurable objectives become self-fulfilling.

Strategic plans with four to six over-arching goals to be achieved within three to five years are the most efficient to manage.

5. **Strategies: What are they? How are they different from tactics? Who is involved in setting strategy?**

Strategies are statements of major approach or method of attaining goals and resolving specific issues. Strategies begin to answer the question “How will we go about accomplishing our goals?”

Strategies describe a general approach or method; they don’t describe specific activities or projects. Initiatives describe specific tasks that will advance a strategy. (Example: A strategy to increase enrollment might be to step up promotion; an initiative tactic might be to increase the number of open houses).

In schools, governing boards typically approve strategic plans to the goal level, leaving the strategy crafting to administrative leadership and the Strategic Planning Committee. This allows the flexibility school management requires in order to keep the plan ‘green,’ adjusting and recalibrating as internal and external conditions change.

6. **Initiatives: What are initiatives?**

Initiatives are the programs, projects, or activities, prioritized annually, which must be accomplished in order to achieve a stated goal. Individuals or groups are the sponsors of initiatives and responsible for their advancement.

7. **Objectives: What are objectives and what’s in a good one?**

Objectives are specific, measurable statements of what will be done to achieve goals within a time frame of one year or less. Objectives are achieved through work plans. Work plans delineate who will do what by when, and include measurements of success or desired outcomes, called success indicators.

8. **Success Indicators: What are they and why do we need them?**

Success indicators track the progress of work plans and document the achievement of strategic vision. Schools in a strategic planning process benefit from an agreed upon set of success indicators in order to communicate plan progress. In education there are success indicators of sustainability presently being built on the national level. They include such benchmarks as student/teacher ratio, teacher salary and compensation, and teacher diversity.

9. Outcomes: What's the difference between these and objectives?

Outcomes are desired changes in awareness, attitude, skills, knowledge, behavior or status sought in a person or group of people. Objectives are the steps taken to obtain the desired outcome. The best objectives are SMART – specific, measurable, agreed upon, reasonable, and time-limited. We like outcome-based objectives because they take objective writing to the next level and identify the change that must occur for the objective to have been considered accomplished.

10. Alignment: What is alignment and how important is it?

Alignment is how closely deeds mirror beliefs and values. Misalignment often occurs when organizations forget why they instituted certain policies and procedures and enact them based on a bureaucratic tradition that has long lost its association with the core value it was created to protect.



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