

GLOSSARY OF STRATEGIC PLANNING TERMS

Action plan	A detailed description of the strategies and steps used to implement a strategic plan.
Baseline	Base level of previous or current performance that can be used to set improvement goals and provide a basis for assessing future progress.
Benchmarking	Gathering information about model efforts or best practices by other organizations engaged in similar endeavors to help establish project targets and goals.
Buy-in	Obtaining agreement from key stakeholders that the proposed plan is acceptable.
Capacity building	The development of an organization's core skills and capabilities, such as leadership, management, finance and fund-raising, programs and evaluation, in order to build the organization's effectiveness and sustainability. The process of assisting an individual or group to identify and address issues and gain the insights, knowledge, and experience needed to solve problems and implement change. Capacity building is facilitated through the provision of technical support activities, including coaching, training, specific technical assistance, and resource networking.
Capital	Assets that are available for on-going business needs to produce income.
Capital improvement	Addition to an organization's fixed assets. Capital improvement is the result from an outlay of funds over a specific and finite period of time that results in a permanent addition to an organization's fixed assets.
Capital plan	A plan for maintaining assets to continue programs.
Case study	A study containing qualitative data (such as observations and information drawn from interviews) about one subject. These studies are typically based on what is termed anecdotal evidence. A series of case studies can provide useful information that something of significance is happening that may merit further study.

Client	Anyone whose interests are served by an organization, or who receives or uses an organization's resources or services. Clients can be internal to an organization, for example one department may be the client of another department, or external to the organization.
Collaboration	To work together sharing ideas and resources, especially in a joint intellectual effort.
Compensation	Money or another item of value given or received as payment or reparation for a service or loss.
Constituency	A group served by an organization or institution; a clientele.
Corporation	A group of individuals legally empowered to transact business as one body.
Cost-benefit analysis	A management tool that involves calculating or estimating the monetary costs and potential benefits of a proposed course of action.
Crosswalk	A research tool used to guide analysis and reporting, particularly when there are multiple data sources. A crosswalk does not present any of the findings or results, just the types of information that has been gathered from the different data sources.
Cultural competence	A set of values, behaviors, attitudes, and practices which enable people to work effectively across racial/ethnic and cultural lines.
Demographics	The characteristics of human populations and population segments, especially when used to identify consumer markets.
Descriptive statistics	Numbers that describe or summarize information about a sample. Three basic descriptive statistics (generally known as measures of central tendencies), are the mode, median, and mean. The mode is the number, item, score or other value that occurs most often. It is the most frequent occurrence in the sample. The median is the middle or midpoint of a distribution. Therefore, it is the number, item, score, or other

value that has 50 percent of the others above and 50 percent of the values below it. The mean, perhaps the most often-used measure of central tendency, is the average number, item, score, or other value in the distribution.

Diversity	Difference, distinctness, variety.
Dynamic information	Information that is characterized by continuous change, activity, or progress.
Empowerment evaluation	An evaluation approach that includes collaborative and training functions within a goal of the empowerment of management and program staff to continuously assure quality of services.
Evaluation	A study to determine the extent to which a program or project reached its goals.
External Assessment	Analysis of the elements or forces that affect the environment in which an organization functions—also called an “environmental scan.”
Facilitator	A person who makes it easier for other people to accomplish objectives by offering advice and assistance in solving problems, either with technical issues or with other people.
Feasibility	Capable of being accomplished or brought about; possible.
Federal mandates	Any provision in a bill or joint resolution before Congress or in a proposed or final Federal regulation that would impose a duty that is enforceable by administrative, civil, or criminal penalty or by injunction (other than a condition of the bill or joint resolution or implementing regulation).
Fiscal	Related to finance or finances.
Focus group	A qualitative research process designed to elicit opinions, attitudes, beliefs, and perceptions from individuals to gain insights and information about a specific topic.
Gap analysis	The identification of the difference between the desired and current state.

Goal	A desired end result.
Grant	A giving of funds for a specific purpose.
Impact evaluation	Evaluations that look specifically at whether or not the program achieved its goals and had its intended effect. An outcome or impact evaluation measures the final results of a program or initiative. (See also, Outcome Evaluation).
Inclusivity	Broadness in orientation or scope (frequently used in terms of broadness of culture and ethnicity).
Inputs	The “nouns” of projects; the resources that are used to make the project happen (such as people and equipment).
Instrument	Research tool used to assess variables during an evaluation. Examples include surveys, questionnaires, telephone interview protocols, executive interview protocols, or focus group protocols.
Internal assessment	Analysis of an organization’s position, performance, problems, and potential.
Interview	A research process that obtains structured information from an individual or group of individuals, usually based upon an established set of questions and/or probes.
Jurisdiction	The limits or territory within which authority may be exercised.
Legislation	A proposed or enacted law or group of laws.
Litmus test	A test that uses a single key indicator to prompt a decision.
Mission statement	A brief, comprehensive statement of purpose of an agency or program.
Monitoring	Assessing the inputs and activities of a project.
Needs assessment	A structured process to determine the needs of a designated survey field, i.e., individuals, an agency, a system, etc.

Objectives	Specific and measurable targets for accomplishing goals.
Operating costs	The day-to-day expenses incurred in running an organization or project, as opposed to costs associated with production.
Operational definitions	Definitions for terms and research variables specific to one program or project; a definition used within a program or project. Research variables must be clearly defined. For example, if the term “recidivism” is being used in a study, it should be defined, such as “committing another criminal or juvenile offense.” How these variables are measured has a great impact on the success of the study. For example, is “committing another offense” measured by arrest data, conviction data, or interviews that may identify additional violations?
Outcomes	The long-term end goals that are influenced by the project, but that usually have other influences affecting them as well. Outcomes reflect the actual results achieved, as well as the impact or benefit, of a program.
Outcome evaluation	Evaluations that look specifically at whether or not the program achieved its goals and had its intended effect. What were the “outcomes” of this program? An outcome or impact evaluation measures the final results of a program or initiative (see also, Impact Evaluation).
Output	A type of performance measure that focuses on the level of activity in a particular program.
Performance measures	Tools or information used to measure results and ensure accountability.
Pilot study	A “scaled down” version of a major effort conducted before a larger study to test feasibility. For example, a pilot test might test proposed measurement instruments, hone the research methodology, or see if there is a preliminary basis for supporting the hypothesis.
Proactive	Acting in advance to deal with an expected difficulty.

Process evaluation	Investigates issues regarding the program’s current operations or the implementation of new initiatives. Questions most often focus on what the program does, who does it, and how it is done.
Project logic	A model that arrays the resources, activities and goals of a project to allow the relationships to be clearly viewed and understood.
Qualitative research	Qualitative research is conducted in a more interpretive and contextual fashion and goes beyond the “facts and figures” gathered by objective measures. Qualitative research attempts to measure the complexity of a given topic and often involves narrative responses to questions, rather than categorical responses.
Quantitative research	Quantitative studies rely upon statistics and measures that can be expressed numerically. In order to make valid inferences from quantitative research, certain rules need to be followed in terms of the research design and sampling methods.
Questionnaire	Written documents that contain a series of questions that are answered by respondents. Typically some form of objective response is required, such as “true-false” or numerical scales (for example, “1 to 5” rankings).
Quasi-experimental research design	These research designs are very typical in field research and program evaluations where, unlike true experimental designs, research subjects cannot be randomly assigned to their respective grouping in the study (for actual or ethical reasons).
Research questions	Questions that ask what variables can and will be manipulated and studied. For example, do restraining orders issued on stalkers reduce violence to victims? Does having a restraining order, the independent variable, result in a reduced likelihood of the stalker hurting the victim, the dependent variable? A research design is based on research questions.

Resource allocation	The determination and allotment of resources or assets necessary to carry out strategies and achieve objectives, within a priority framework.
Resource plan	Part of the definition statement stating how the program will be resource loaded and what supporting services, infrastructure, and third party services are required. Also, a component of the program definition statement stating how the program will be resourced, and specifying what supporting services, infrastructure and third party services are required.
Restitution	The act of restoring to the rightful owner something that has been taken away, lost, or surrendered.
Results	The “outputs” of the activities of a project, directly measurable and within the control and influence of the project.
Request for Proposal (RFP)	A formal invitation containing a scope of work which seeks a formal response (proposal) describing both methodology and compensation to form the basis of a contract. An RFP is prepared by the customer to solicit proposals from potential providers.
Sample	Some smaller part of a larger population that is being studied. One of the key aspects of a sample is whether it is truly representative of the larger population. To be representative, the methods of drawing the sample are critical.
Service delivery	The method used to provide services to a client.
Stakeholder	Any person or group with a vested interest in the outcome of a project or plan.
Survey	A study where data are collected by way of questionnaires or interviews. Surveys can either be observational, if no intervention or treatment occurred, or can be used as pre-test and post-test measures before and after some intervention or treatment.

Strategic plan	A practical, action-oriented guide based on an examination of internal and external factors that directs goal-setting and resource allocation to achieve meaningful results over time.
SWOT analysis	An abbreviation used to denote analysis of an organization's internal Strengths and Weaknesses and external Opportunities and Threats. Also called an "internal/external assessment."
Survey instrument	The research tool used to conduct a survey—for example, a mailed questionnaire, a telephone script, etc.
Tracking systems	Systems set up to monitor progress, compile management information, and keep goals on track.
Underserved populations	Groups identified as potential clients who are not receiving the full extent of services an organization provides, often because of a history of exclusion due to race or ethnicity.
Unserved populations	Groups identified as potential clients who are not receiving any services an organization provides, often because of a history of exclusion due to race or ethnicity.
Values statement	A narrative description that outlines an organization's beliefs and guiding principles.
Vision statement	A narrative description of a future state to help keep project teams focused. A concise statement of what needs to change, typically the promoter, sponsor, or leader's "agenda." A compelling, conceptual image of the desired future.