

Glossary of Strategic Planning

Strategic planning terminology is not standardized. In a broadly participatory planning process, it is therefore essential to establish a common understanding of definitions for the components of a strategic plan.

Term	Meaning	Example
Mission statement	Declaration of an organization's purpose—its <i>raison d'être</i>[the university seeks] to stimulate intellectual curiosity, imagination, critical thinking, and thoughtful expression in a broad range of disciplines and professional fields.
Vision statement	A realistic, credible, attractive future for the institution. Sets forth the "ideal" state that the university aims to achieve. Provides long-term direction, guidance and inspiration for the organization.	...[we are committed] to placing UNCW in a position of preeminence among midsized, public universities in the South.
Identity statement	A concise statement of salient and distinguishing characteristics of an institution—"who we are and how we are different."	UNCW is unique in its dedication to combining a small-college commitment to excellence in teaching with a research university's opportunities for student involvement in significant faculty scholarship.
Core values	Enduring beliefs or principles that the institution's individuals hold in common and endeavor to put into action. Core values guide faculty, staff, administrators (and sometimes students) in performing their work.	We are a community of learners that embraces scholarship and the necessary interplay between teaching and research.

Strategic goals	Fundamental issues the university must address. They give direction for accomplishing the mission, contain specific and meaningful planning challenges, and result from previous analysis. Strategic goals are desired ends, which are not necessarily attainable or quantifiable.	Create an educational environment that prepares our students to be global citizens.
Strategic objectives	Means of achieving, or moving toward, a goal. Objectives are measurable and quantifiable. They focus efforts on demonstrable results and provide broad categories for planning resource allocation.	Recruit, develop and retain a critical mass of diverse faculty.
Progress measures	Specific performance targets that impact the entire organization, address its strategic goals, are stated in terms of measurable and verifiable outcomes, and challenge the organization to be more responsive to the environment to achieve its desired future. Strategic goals are SMART : S pecific, M easurable, A ttainable, R ewarding, and T imed.	By 2008, increase the alumni giving rate to 16%.
Articulation of Quality	An expanded articulation of an ideal future condition of quality, arising from the words and phrases of the Strategic Plan.	Extensive undergraduate student involvement in significant faculty scholarship distinguishes UNCW from every other public master's institution in the nation.

Strategies	Broadly stated means of deploying resources to achieve strategic goals.	Aggressively pursue contact information for "lost alumni" and increase the number of alumni solicited each year.
Action plan	Tactics describing who, what, when, where and how activities will take place to implement a strategy.	University Advancement will contract to telephonically solicit 6000 more potential alumni donors in 2003-04. The total incremental cost will be shared equally by the Chancellor's Office (\$8500) and the Alumni Association (\$8500).
Performance indicator	Quantitative measure of success used to determine progress toward achievement of strategic goals.	Freshman to sophomore retention rate
Expected outcome	A specific and desired benefit that occurs to participants of a program following application of an intentional action, generally phrased in terms of the changes in knowledge, skills, attitudes, behavior, condition or status that are expected to occur in the participants as a result of implementing the action.	Students will express a high degree of satisfaction with academic advising throughout their undergraduate careers.
Assessment	The systematic collection, review and use of information about programs, operations or services undertaken for the purpose of ascertaining impact and effecting improvement.	The process of "closing the loop", whether used to determine the extent to which unit goals are being achieved or measuring the extent to which students demonstrate they can meet expected learning outcomes.
Accountability	The demonstration or proof to external constituencies that the programs, services and management of an institution are responsible and effective.	The Spellings Commission's efforts to standardize public reporting of the performance of colleges and universities.

Benchmarking	The process of continuously comparing and measuring an organization against recognized leaders and similar organizations to gain information that will help the organization take action to improve its performance.	UNCW Benchmark Study 2003, its use in developing a strategic plan, and its annual followups.
Peer institution	An institution with similar or aspirational characteristics whose comparative quantitative data is used to establish goals, to set priorities, to measure progress, and to influence institutional improvement.	Sister UNC institutions, Board of Governors approved peers, Southern Regional Education Board Type 3 institutions, institutions of Carnegie classification “Master’s – L”
Strategic plan	A document used to organize the present on the basis of projections of the desired future.	UNCW Strategic Plan

Definitions adapted from various sources including:

1. UNC Long-Range Planning Guidelines
2. Hax & Majluf (1991) The Strategy Concept and Process, A Pragmatic Approach
3. Rowley, Lujan & Dolence (1997) Strategic Change in Colleges and Universities
4. Palomba & Banta (1999) Assessment Essentials: Planning, Implementing and Improving Assessment in Higher Education