



STRATEGIC PLANNING

A Guide

Measure twice, cut once

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A GUIDE TO STRATEGIC PLANNING

(Measure twice, cut once.)

INTRODUCTION AND DEFINITIONS

There are roughly 1,738 ways of approaching the process of strategic planning. Many of them claim to be the *right* way. I claim only to have found these guidelines very helpful with many clients – group and individuals. We have, in each case, collaboratively modified them to suit their particular needs – for *Big Picture* (whole organisation) planning or for other strategic initiatives.

A **strategic plan** is an arrangement of the critical procedures that must be implemented to align resources in productive directions. Its purpose is to focus and guide collective action and methodically align progress with intentions to succeed. As with any management operating system, it should help an organisation do a better job: focus its energy, ensure its members are working toward the same goals, assess and adjust direction in response to a changing environment.

A well-managed strategic plan provides the focus and fundamental reference-point for both collective responsibility for an organisation's Big Picture and the responsibilities towards this of individual units. It acts as a *map of the territory*, establishing two points essential to its use – the intended destination and the current location. It indicates the best route from one to the other and broad steps for this journey.

Strategic planning is the disciplined process by which this *map of the territory* is periodically determined: the periodic refreshing of a continuous *management operating system* designed to produce fundamental decisions and actions that shape and guide what an organisation is, what it does, and how it does it, with a focus on the future. The process is **strategic** because it involves preparing the best way to respond to the circumstances of the operating environment, whether or not those circumstances are known in advance.

Whether conducted at an organisational, divisional or business unit level, the generic process of strategic planning is the basically the same – a structured sequence of *Hindsight, Insight, Foresight* and methodical planning.

While the outcome, a strategic plan, is a useful and necessary product of the process, *strategic thinking* is probably more important and methodical management of the ensuing plan is crucial. An effective planning process or even a well-written strategic plan may be pointless unless the plan is well-managed. Strategic planning as a mere “calendar-driven ritual” resulting in documentation rarely consulted but often scoffed at is a wasteful and futile exercise.

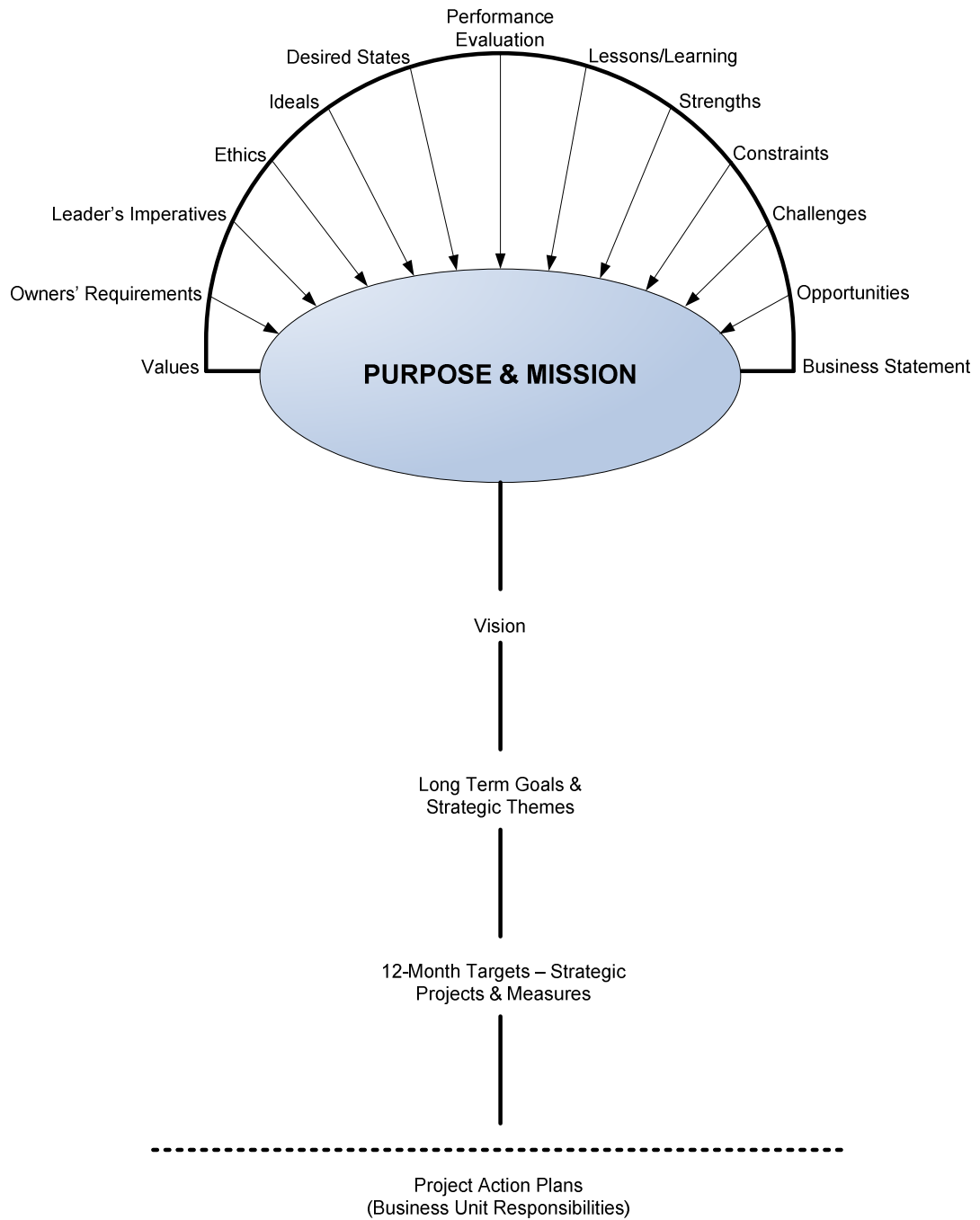
Strategic thinking involves asking, “*Are we doing the right thing?*” and makes that assessment against three key requirements: a definite purpose, an understanding of the forces that affect or impede the fulfillment of that purpose, and creativity in developing effective responses to those forces.

Strategic management is the application of strategic thinking to the job of leading an organisation. It is adaptive and keeps an organisation relevant. It involves asking, “*Are we doing the right things right?*”, and requires willingness to adapt to changing circumstances.

When the process is not being conducted at the highest level of the organisation it must, of course, make the parent organisation's existing plans the principal reference-point; and the plan that ensues must align and fit within the organisation's *Big Picture*.

Tom Watkins

STRATEGIC PLANNING OVERVIEW - #1



THE PROCESS

Strategic planning employs a sequence of three stages approximating a focus on past, present and future, in turn: What? (*Hindsight*), So what? (*Insight*), Now what? (*Foresight*). The process engages an organisation in transforming this scrutiny into aligned and coordinated action. It reviews and refines answers to questions such as these:

- What is our purpose, really?
- What are the foundational reference-points that should guide everything we do and aim for?
- How do we identify and distinguish ourselves?
- What have we learned from recent experiences?
- Where are we heading?
- What is expected of us?
- What do we want to do?
- What are we able to do?
- What must we do?
- What kind of organisation do we need to become?
- How shall we organise and structure?
- How should we behave towards all those involved and affected?
- How shall we keep on target?
- Who should undertake the necessary responsibilities?
- In what ways shall we monitor progress and measure our success?

OUTCOMES OF A WELL-MANAGED STRATEGIC PLAN*

The intended outcomes usually include –

- The long-range targets for development and success are held clearly in focus.
- The organisations (or group's) customers and clients are correctly identified and their needs identified.
- Our distinct *way of doing things* – our business style, organisational culture and everyday behaviours – reflect what we claim as our foundational values.
- The organisational structure facilitates the desired results.
- The right people are in the right places.
- We have access to all the skills required.
- Attention to our *Primary Task* (what the organisation must do in order to remain in business) and to developing capacity for *Primary Task* is well-balanced.
- We have sufficient financial and other physical resources.
- The management operating systems we have in place give people the information and support they need for high performance.
- The services we receive and provide meet or exceed the needs of the clients or customers.
- Those who must derive direction and inspiration from the plan (especially those who must derive operational plans from it) are accurately guided and inspired.
- There is wholehearted commitment to the plan, from those whose support is necessary for it to succeed.

* The operative word here is *managed*. An effective planning process or even a well-written strategic plan is pointless unless it is methodically managed. Planning-the-plan is only the first stage of systematic management and does not in itself guarantee success.

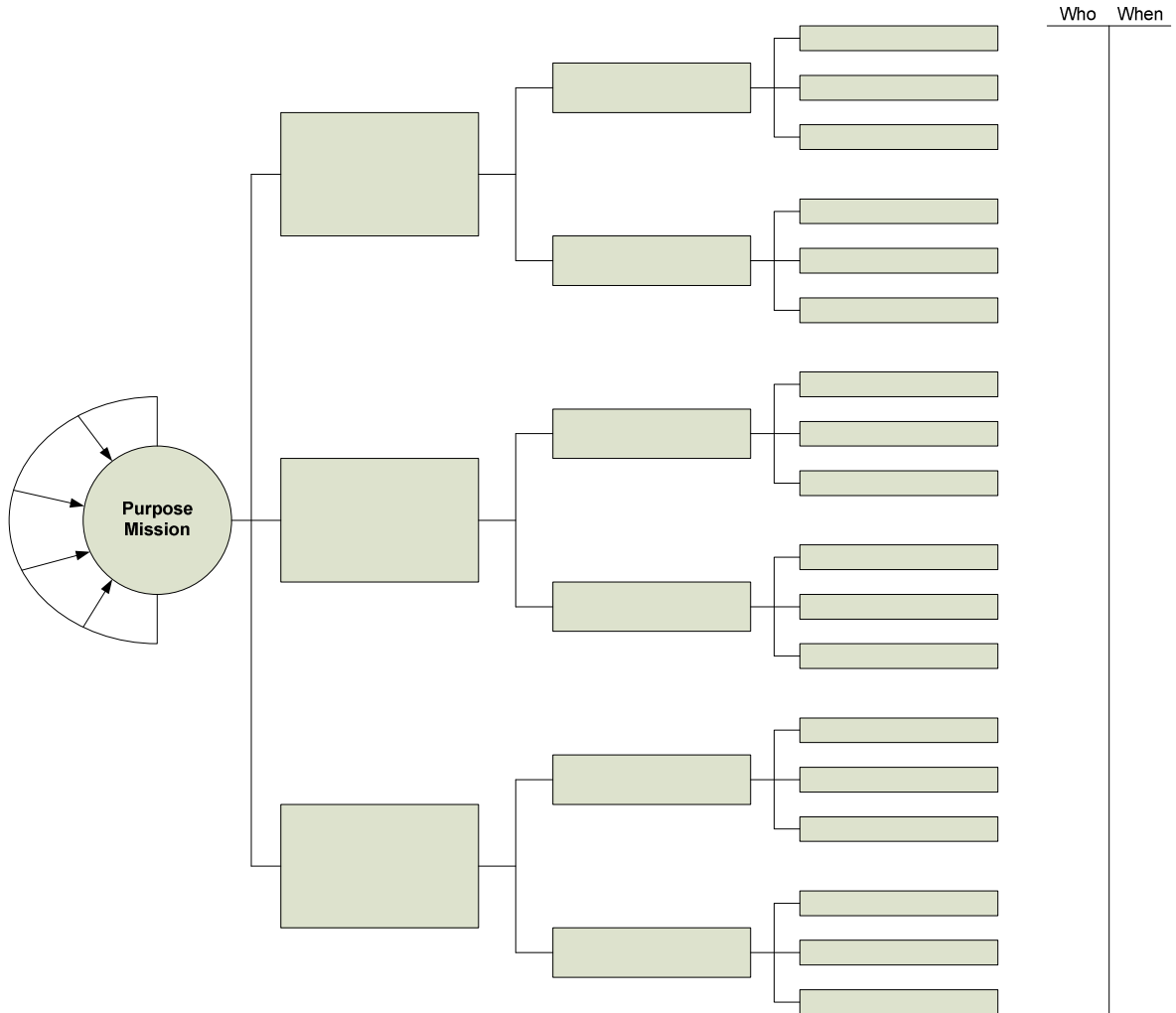
STRATEGIC PLANNING OVERVIEW - #2

1 Scan & Focus

2 Critical Elements/Key Drivers

3 Operational Implementation
(Business Unit Responsibilities)

(Where to?) (What?)
Broad direction 1-year objectives
(Vision and strategic (Strategic projects)
themes)



STAGES IN THE STRATEGIC PLANNING PROCESS

PREPARING		
<p>Data is gathered for consideration. This should include evaluation (especially via the perceptions of those whose views will not be otherwise represented throughout the process) of actual achievements compared to those targeted in the previous Strategic Plan.</p> <p>Fit-for-purpose processes and techniques, and optimal circumstances are established for the process.</p> <p>Templates and schema are pre-determined for documenting and communicating the outcomes.</p>		
PLANNING		
What? (Hindsight)	So what? (Insight)	Now what? (Foresight)
<p>Past events and current reality are explored and examined. Feedback and other data gathered from constituents, customers and the marketplace are combined with anecdotal material and subjective experiences.</p>	<p>Learning is distilled from experience, laws of action and principles of change are generated as guidelines. Current and anticipated influences are surveyed and considered in the light of this.</p>	<p>Core principles and ideals are affirmed or refreshed. New aspirations and desired-states are established. Direction is clarified and targets set. Strategies for implementing change are created.</p>
COMMUNICATING AND ENGAGING		
<p>Unless the organisation's full complement has taken part in the exercise (and it is possible for all to at least have their views represented, even if absent from the planning occasion), the plan will need to be marketed to all those whose support and commitment is necessary for it to succeed. Implementing and managing the plan is something in which every executive should be involved and over which they must give leadership.</p>		
<p>External customer-focus</p> <p>What our services/products make possible.</p> <p>How they can be accessed and what that requires.</p> <p>Who we support or work with and where.</p>	<p>Partly internal/partly external customer focus</p> <p>What our work is for.</p> <p>What sets us apart from other providers.</p> <p>What we do.</p> <p>How we do it.</p> <p>Our business statement, vision, guiding principles, and foundational philosophy</p>	
For internal application, to guide planning and management		
<p>Current ideals held for this planning period.</p> <p>Organisation-wide strategic imperatives.</p> <p>Unit-wide strategic business targets to achieve Primary Task.</p> <p>Unit-wide strategic targets to develop capacity for Primary Task/Purpose.</p> <p>Summary of the Strategic Plan (interpretation and implications if necessary) and how to access the complete version.</p>		
IMPLEMENTING		
<p>See graphics - <i>Plan & Manage the Plan</i> and Strategic Planning Process Overview.</p>		
MONITORING		
<p>See graphics - <i>Plan & Manage the Plan</i> and Strategic Planning Process Overview.</p>		
EVALUATING		
<p>See graphics - <i>Plan & Manage the Plan</i> and Strategic Planning Process Overview.</p>		

CONSIDERATIONS FOR STRATEGIC THINKING

A: Dee Hock (Founder of [Chaordic Commons](#) and the Chaordic Alliance)

“Conventional strategic planning confuses real vision with the manipulation of numbers; it is a calendar-driven ritual, it reduces complexity to the same simple few rules; it assumes the future will be like the past with a few embellishments; it rarely challenges conventions; and it draws only on the brainpower of the people at the top whose thinking is often so similar they can finish each others’ sentences . . . What’s needed is more imagination applied to building a strategy. This requires opening discussion of strategy to many people, especially those who are younger and older than the guardians of the *status quo* and who can bring a much-needed new perspective.

“Involve the whole organisation and help the pro-change constituency that exists in every organisation, find its voice. Use feedback and learning to help the strategy evolve. Use cross-functional teams that slice vertically and horizontally in the organisation. Collect and share customer feedback and other information from the marketplace. Involve suppliers.

“An organisation has no reality, save in the mind and spirit. It is a concept to which people and resources are drawn in pursuit of a common purpose: a manifestation of community. If this is true, then the success of any organisation has infinitely more to do with clarity of shared purpose and principles, and strength of belief in them, than it does with management practices or resources, important as they may be. Without the hearts and minds of people, all assets are just so much inert chemical and mineral material.

“The heart and soul of the successful organisation is in conceiving it on the basis of purpose and principle, and allowing the structure to evolve from there . . . After a group agrees on its purpose and principles, the actions of the organisation grow continually and organically from the shared purpose. The result will be flexible, changeable, and viable with a core of integrity shared by each member – a community in balance with itself and its environment.

“Shared purpose cannot be imposed on people. It emerges; it evolves. The ideal organisation should be based on biological concepts. It has to evolve, in effect, to invent itself . . . Organisations thought of in terms of biological metaphors, must acknowledge the whole human being – body, mind, and spirit – the whole person, with emotions, intuitions, beliefs, and thoughts. When you bring all that to the table, discussion of change becomes value-based.

“I call this new age chaordic because it will be immensely complex and chaotic, but also requires cohesion and coherence, or order.

B: Jim Clemmer (Author, speaker, workshop/retreat leader, and management team developer on leadership, change, customer focus, culture, and personal growth.)

“Empowering people without changing the processes, structure or systems they work in is worse than useless. It increases helplessness and cynicism. It’s like ‘empowering’ a pumpkin seed in a Mason jar to become a full grown, well-rounded pumpkin - but leaving it in the jar.”

C: Proudfoot Consulting 2005 Productivity Report (From an analysis of data captured during 2,614 detailed studies from 100 projects undertaken in medium to large sized firms from 13 business sectors in 12 countries)

“Intrinsic to organisation effectiveness is management quality; the methods used to measure, plan and control work are fundamentally important. “[But] management processes and work control systems that are appropriate and used universally are rare. We found more than half of systems used were inappropriate. Almost one third that were, needed improvements . . .

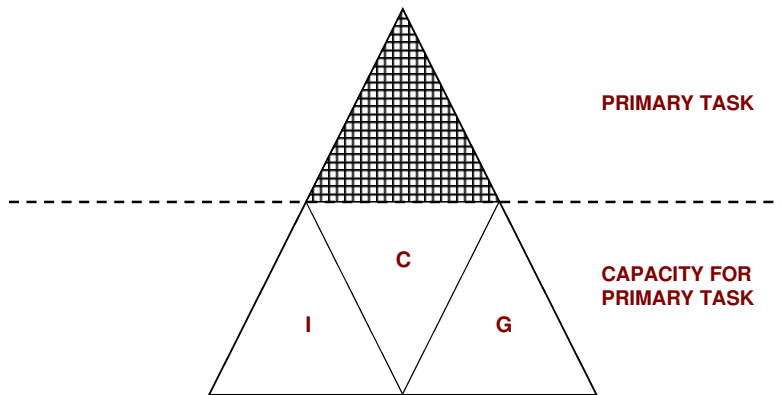
“Most executives don’t think existing systems need attention . . . on the whole, [they] don’t make the connection between these systems and the causes of inefficiency . . .

“In some cases, we find that businesses have no documented or understood process to manage their business: things happen chaotically and without consistency. In others, we find that a system does exist but it is misunderstood, not used in a systematic manner or needs improving. In all cases we found more than half of the systems used were inappropriate for their intended purposes.

“Addressing these apparently mundane issues is still given too little priority compared with investing in new plant and equipment . . . Some of this reluctance to prioritise running things well is surely because management finds it uncomfortable as well as unglamorous.”

D: PRIMARY TASK AND DEVELOPING CAPACITY FOR IT¹

Conventionally, most organisational attention is given to the *Primary Task*, often to the virtual exclusion of developing capacity for it:



- I** = DEVELOPMENT OF INDIVIDUALS
- G** = DEVELOPMENT OF GROUP, TEAM, RELATIONSHIPS, CULTURE
- C** = CONSTANT MONITORING, CONTINUOUS IMPROVEMENT (OF ALL THREE AREAS)

The imbalance eventually produces inevitable negative effects.

High	Functional Driven Desperate Tense Struggling Inefficient	Efficient Effective Flourishing Robust Vital
Low	Inefficient Ineffective Incapable Dysfunctional	Capable Frustrated Ineffective
	Low	High

Developing Capacity for Primary Task

¹ From "*Thriving!*", Tom Watkins, 2006.

E: PRIORITY MANAGEMENT AND THE “SOFT SIDE” OF MANAGEMENT²

The key to avoiding unnecessary crises, emergencies and unhealthy stress (both individually and organisationally) is managing priorities, not time. Time is a constant that will not be planned or controlled and can only be managed in the sense of “coping with” however much there is available. When decisions about priority-management are based and focused on a clear sense of values and purpose, fewer crises are generated. This is a matter of *keeping the main thing the main thing*, a practice whose success depends, of course, on knowing what that is. Much of what it **ought** to be, in organisations, is not difficult to establish. *Hock, Clemmer and Proudfoot Consulting* give clear indications, as do my notes about balancing attention to Primary Task and developing capacity for Primary Task, (see the preceding pages).

The following graphic indicates some of the vital practices (in Quadrant 4) and some of consequences of not giving them the attention they deserve:

URGENCY	HIGH	<p>1 Urgent but not important</p> <p>Reacting to the urgencies of others</p> <p>Throwing ill-considered “solutions” at serious problems as quick-fixes.</p> <p>Attending meetings which have possible short-term benefits, but little or no contribution to long-term plans.</p> <p>Dealing with pressing and serious matters without reference to an overall plan or well-considered priority list.</p>	<p>2 Urgent and important</p> <p>Dealing with -</p> <ul style="list-style-type: none"> • crises, and emergencies • complaints and malperformance • constantly re-surfacing problems • destructive conflicts • overdue critical projects • damaged relationships • role overlaps, underlaps, confusion • absence of key people through stress-related illness
	LOW	<p>3 Not urgent, not important</p> <p>Attending to unsorted tasks in the order they catch the attention</p> <p>Yielding to unscheduled interruptions without checking their importance</p> <p>Unfocused busy-ness, complaining, dithering or idle <i>chewing the fat</i>.</p> <p>Anxiety and fretfulness</p> <p>Working outside of own strengths and competence</p>	<p>4 Important but not urgent</p> <p>Models and Practices for –</p> <ul style="list-style-type: none"> ◆ Clarifying the Big Picture ◆ Holding the focus ◆ Providing leadership ◆ Performance development ◆ Planning and managing plans ◆ Interpersonal effectiveness ◆ Conducting meetings ◆ Conflict resolution ◆ Problem solving ◆ Decision-making ◆ Developing groups and teams
		LOW	HIGH

IMPORTANCE

Because of their vital role in determining organisational culture, efficiency, effectiveness and capacity, the Quadrant 4 activities listed above are matters that ought to concern organisational governance. They should be strategic imperatives not operational options - pre-determined methodologies specified and imposed across the whole organisation, matters for high-level determination, strategic planning and development policies.

Specific competencies should be prescribed, competency levels assessed and skill-development made systematic, continuous and widespread.

Plans for this should include regular monitoring, refinement and review.

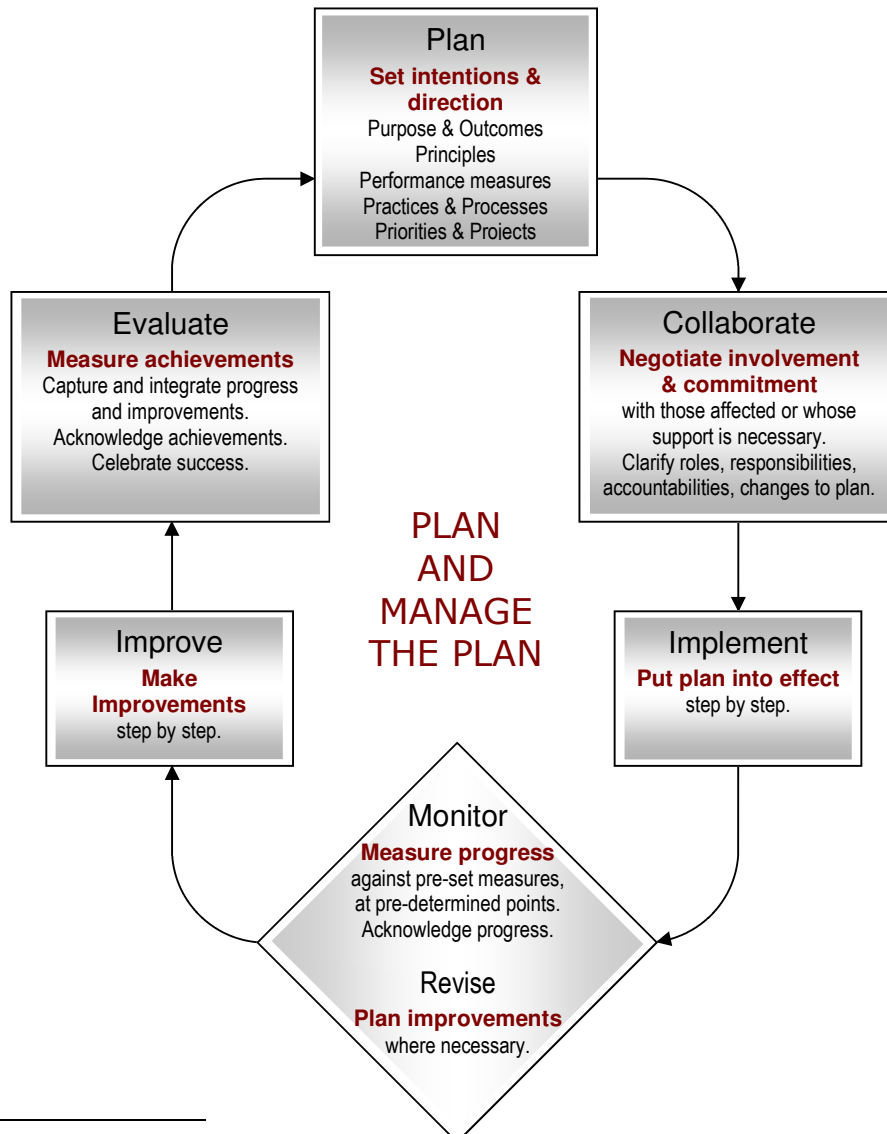
² From “*Thriving!*”, Tom Watkins, 2006.

F: PLANNING AND METHODICALLY MANAGING PLANS³

Many groups and organisations do not use methodical planning processes consistently. Instead, they expect improvisation or “discussion and agreement” (often assumed and untested) to result in cohesive, coordinated arrangements designed to efficiently produce results, despite recurring evidence to the contrary: (things can’t go according to a plan you don’t have). But even when better planning is attempted, there are other reasons plans fail:

- Agenda of planning meetings is mistaken for purpose.
- Intentions, priorities, processes (methodology, means) and desired outcomes are unknown or so indistinct as to make progress measurement impossible.
- Inappropriate processes used during planning (for problem-solving and decision-making, for example) deflect attention from the important issues.
- Responsibility for managing the plan is not assigned and accepted
- The plan is not methodically managed: monitored, refined and evaluated at pre-determined points.
- The plan is made and implemented without the input or commitment of those affected by it and therefore attracts their apathy or cynicism.

Methodical planning-and-managing a plan involves a sequence of steps similar to this:



³ From “Thriving!”, Tom Watkins, 2006.

BALANCING THE FOCUS OF STRATEGIC PLANNING ATTENTION

Imperatives for Efficient Functioning of the Organisation, Unit, Division, Department or Section		
<p>To Achieve Primary Purpose:</p> <p>Specification of:</p> <ul style="list-style-type: none"> ▪ Structure ▪ Role/s ▪ Responsibilities ▪ Accountabilities (including reporting) ▪ Competencies <p>Key drivers</p> <p>Targets</p> <p>Strategy</p> <p>Requisite information and information systems</p> <p>Requisite material resources</p> <p>Functional, professional skills.</p>	<p style="text-align: center;">To Develop Capacity for Primary Purpose:</p> <p>Models, protocols and practices for methodical:</p> <p>Leadership</p> <p>Problem solving</p> <p>Decision making</p> <p>Priority management</p> <p>Planning and plan management</p> <p>Group facilitation</p> <p>Performance development practices and models:</p> <ul style="list-style-type: none"> ▪ Customer feedback, especially on management, leadership interpersonal and group-work practices ▪ Supervision ▪ Coaching ▪ Mentoring ▪ Training. 	
	<p style="text-align: center;">Developing Individuals:</p> <p>Interpersonal skills and protocols for relationship and group management, including:</p> <ul style="list-style-type: none"> ▪ Giving feedback ▪ Receiving feedback ▪ Setting and holding boundaries ▪ Requesting/influencing behaviour changes ▪ Discussing differences and resolving conflict. 	<p style="text-align: center;">Developing Groups & Teams:</p> <p>Team specification</p> <p>Team roles</p> <p>Team skills mix</p> <p>Team development</p> <p>Developing creativity</p> <p>Resolution of conflict</p> <p>Fit-for-purpose meetings</p> <p>Inter-group relationships.</p>
<p style="text-align: center;">To Achieve both Primary Task and Develop Capacity (individual and collective):</p> <p>Methodical planning, targeting, indicating, progress monitoring, refinement, evaluation, continuous improvement.</p> <p>Coordination of all plans, practices, and collective learning from experience.</p> <p>Inculcation of the desired culture (derived from statements of purpose, beliefs, values, principles and ethics) to the point that it is recognisable in everyday routine behaviours.</p>		

QUESTIONS FOR FOCUSING AND MANAGING THE PROCESS

A: Managing the Strategic Plan

How do we define and how will we identify a fit-for-purpose strategic plan?

Who is this plan for – its customers, clients, stakeholders?

What do these people or groups need – how will they use it?

Who ought to be involved in this planning process?

For what period is it intended to provide strategic direction?

In what forms will it be made available?

What elements are to be included in the plan?

(When relevant): Where does this plan and its process fit within the organisation's wider planning process?

What is the cut-off point between the strategic plan and other plans (e.g., those of individual business units)?

Against what criteria and when will the plan's progress be monitored and its overall success be evaluated?

Who will manage implementation of the (overall) plan?

How shall we market this plan and engage others' commitment to it?

B: Establishing the Foundational References

What are the owners'/governing body's requirements and expectations?

What is our Primary Purpose, really?

What is the nature of the business activities we are committed to long-term?

What are the foundational reference-points that should guide everything we do and aim for: beliefs, values, principles, policy guidelines and ethical positions?

What must we address to develop sufficient capacity for our Primary Purpose?

How do we identify and distinguish ourselves?

Who do we serve, need or want to work with?

What niche do we aim to target, reach or respond to?

What unique service characteristics and qualities do we possess?

What sets us apart from others in this or related fields – outside of our organisation and (where relevant) within it?

What is our mission?

What is the current leaders' vision for the future?

What is our collective desired future?

What broad outcomes are our efforts directed towards?

C: Scanning the Organisation, the Environment and Market

What are the main social, political economic trends, market forces and other (internal and external) driving forces or influences impacting on us?

What gaps exist between the ideals and intentions of the previous plan and the actual position we reached?

What potential is as yet unrealised?

Which opportunities were missed?

What have been our organisational and personal stressors?

What caused any under-achievement?

What do our customers (internal and external) want and need? What is their experience of the quality of our products and services?

In what ways are we failing our customers and clients?

What are we doing (right) that our customers and clients are responding to?

What are our current challenges, problems opportunities for improvement?

What are our strengths?

What is our unrealised capacity?

D: Focusing the Intentions

What position do we want to be in by the end of the period covered by this plan?

What are the key drivers that must shape the future direction and activities?

What are we able to do?

What must we do?

What gaps exist between our ideals/intentions and the current reality?

What will success look like?

E: Strategising

Where are we heading (a) in the long term; (b) in the medium term; and (c) immediately?

Broadly, how shall we close gaps between our ideals and current reality?

How should we behave?

How should the respective parts of our organisation/group align and integrate?

What tools, information and other resources do we need?

What achievements will be evidence of our wanted position/desired future achieved (stated broadly but in ways that are measurable)?

What needs to be done to gain others' commitment to this plan?

How and when shall we monitor progress?

In what ways shall we continue to coordinate and align all our strategic efforts?

APPENDIX

Terminology

Belief: Intellectual acceptance of a statement, fact, doctrine, thing etc., as real or true or existing; a proposition or set of propositions held to be true. Beliefs are the origin of values, principles, ethics: *Because I believe . . . , I value . . . I therefore hold these principles and policies . . . And consequently follow these practices . . .*

Business Plan: Specific goals and objectives for achieving the desired future encompassed within the organisation's Purpose and Mission statements, Strategic Themes, Strategic Projects and Objectives. Includes action-plans for improvement projects and business plans of all business units or divisions.

Business Statement: The nature of the business activities we are committed to long-term; indicative but unlimiting of opportunities; succinct and memorable. *"We are in the business of . . . ". "We are in the . . . business."*

Capacity for Primary Task: the degree of ability to attend to Primary Task. The term may also refer to innate potential for growth, development and accomplishment.

Customer or Client: The next person in line in receipt of our products or services. *Internal* customers or clients are usually those employed by the organisation.

Driver: A strategy designed to drive change is best focused on a small number of ambitious goals which the whole organisation can be motivated by, contribute to, and get behind. These are termed strategic, business, or organisational *drivers*.

A *driver* supplies the motive power for going forward (it motivates). *Drivers* powerfully and irresistibly urge, impel or control the course or direction of something, through to conclusion. They help the organisation and individuals align day-to-day activity with current strategic intentions.

An organisation's *drivers* underpin (provide basic reference-points for) the interpretation of strategy and the design of tactics. They apply to everyone in the organisation and should underpin priority-management, problem-solving, decision-making and planning practices.

Ethics: A set of moral principles.

Goal: A broad target of activities within a particular purpose.

Identity Statement: A summary of how an organisation sees itself and/or its focus and sets itself apart from others in the same or similar fields. (Sometimes subsumed under **Mission Statement**.)

Infrastructure: The basic facilities, services, and installations needed for the functioning of an organisation.

Key Performance Indicator: A **Performance Indicator** is a statement of intended results measurable at the completion of the plan, task, project or development. Progress towards achievement may also be measured against them. **Key Performance Indicators** are the vital few, separated from the relevant many.

Measure/Strategic Measure: Indicators of progress or desired performance. A strategic measure is a performance indicator that makes measurable, progress towards and realisation of strategic themes, strategic project or (for instance) the desired organisational culture.

Mission/Mission Statement: An organisation's mission statement is typically focused on its present business scope - "who we are and what we do"; it will broadly express the organisation's present purpose, capabilities, customer focus, activities, and business makeup - both for those within the organisation and

for customers and the public. It serves to ensure that everyone in the organisation is “on the same page” and as a baseline for effective business planning. Three further perspectives follow:

- 1 A mission statement defines what an organization is, why it exists, its reason for being. At a minimum, your mission statement should define who your primary customers are, identify the products and services you produce, and describe the geographical location in which you operate.
- 2 The mission statement is a sentence describing a company's function, markets and competitive advantages; a short written statement of your business goals and philosophies.
- 3 The mission statement is a high-level statement of the desired direction or end-point; a succinct statement of the long-term “wanted position” providing a memorable focus and inspiration for efforts of all constituents. Believable and achievable. Precise (as short as a single sentence) and realistic. Unique and marketable.

Objective: A specific target within a goal.

Outcome: The end result of the organisation's activities for its customers and stakeholders.

Output: Services, activities or products produced by the organisation. Tangible items which contribute to achieving an outcome.

Policy: A course of action or procedure considered expedient, prudent or advantageous and derived from guiding principles.

Primary Task: What the organisation must do in order to survive: (e.g., produce the services it was created for; make sufficient sales and a profit; satisfy the needs of stakeholders, customers/clients; gain sufficient votes).

Principle: A general law, doctrine or rule adopted or professed as a guide to action; a fundamental motive or reason for action; a code of conduct or right action.

Purpose: The answer to the question, “*What is this for . . . ?*”.

Responsibility: Actions and activities for which one is responsible; a duty, obligation, or burden.

Role: A function or position.

Stakeholder: A person or group with an interest or concern in the organisation.

Strategy: A general plan of action set to achieve an end with the forces or means available. The planning and direction of the larger movement and overall operations of a campaign.

Strategic Theme: A prominent, frequently recurring focus or cause provoking action that – (a) aligns with the purpose, mission, desired future and desired organisation culture; (b) aims at realising the current vision; (c) addresses current challenges and improvement opportunities; (d) maximises current strengths and potential.

Strategic Measure: A performance indicator that enables measurement of progress towards and realisation of strategic themes, strategic projects or the desired organisation culture.

Structure: The particular arrangement or formation of parts to form a whole, and their interrelation.

Unit: A group regarded as a distinct entity within a larger group.

Value: A judgement of what is worthwhile and important. A generally-accepted judgement about what is valuable and important in life or in work and organisational life. The standards against which we judge ourselves as being within or outside of our integrity; the promotion of which will determine the organisational culture and ethos; from which policy guidelines will be drawn, written and promulgated.

Values may be espoused or applied: whatever values are espoused, actual (applied) values are indicated by day-to-day behaviours.

Vision: A far-sighted view of what the future could be; an inspirational sign-post of intent. Generally, it is more important that the vision statement is known by and clear to the organisation's staff, rather than its external customers.

■ ■ ■