Appendix C – Glossary of Planning-Related Terms

ALIGNMENT
- *NOUN* (a) based on a shared understanding of organization-wide goals and measures, a state of **consistency** among plans, processes, information, resource use, and decision-making that supports progress towards such organization-wide goals and measures; alignment is necessary but not sufficient for integration (see Figure 1).

BENCHMARKING
- *NOUN* (a) processes and results that represent the best practices and best performance for similar activities, inside or outside an organization's industry; used to understand the current dimensions of world-class performance (read, *EXCELLENCE*) and to achieve discontinuous (non-incremental) or "breakthrough" improvement.

GOAL(S)
- *NOUN* (a) future conditions or performance levels that an organization intends to attain and that guide planning; may be short- or longer-term.

INDICATORS a/k/a MEASURES a/k/a METRICS
- *NOUN* (a) numerical information that quantifies an organization's performance, in terms of its processes, programs, offerings, services, and its overall outcomes.

Indicator Type	Description
Leading Indicator	Measures of performance directly attributed to actions over which there is much control over the inputs, making these indicators easier to change. (e.g., student attendance, utilization of tutoring or other services, performance in class or on homework, final grades).
Lagging Indicator	Measures of performance not easily attributed to simple actions but rather impacted by multiple, complex systems, over which there is little control by any single entity—that is, these measures of performance reflect collective efforts across multiple systems and are harder to change without such collective effort over time (e.g., degree and certificate completion, or gainful employment in the occupation of choice).

KEY
- *ADJECTIVE* (a) of paramount or crucial importance; (b) major or most important; critical to achieving intended outcomes.

MAJOR INITIATIVE(S)
- *NOUN* (a) see PROJECT; a temporary endeavor undertaken to create a unique product or service; distinct from operations because they have a definite beginning and an end, and a limited duration.

META MAJORS

- *NOUN* (a) a collection of academic programs that have related or common courses. In concept, Meta Majors are comprised of groups of degrees and certificates that are considered similar from students' perspectives. Meta Majors assist students in selecting an academic program of study based on skills, interests knowledge and abilities, as well as help students make clear connections between their studies and career paths.

OBJECTIVES

- *NOUN* (a) aims or responses that an organization articulates to address major change or improvement in performance that must be achieved to remain viable and competitive in the long-term; defined in measureable terms and used to guide resource allocation.

ORGANIZATIONAL LEARNING

- *NOUN* (a) new knowledge or skills acquired by an organization through research and development, evaluation and improvement cycles, ideas and input from the workforce and stakeholders, the sharing of best practices, and benchmarking (see Figure 2). Moreover, its workforce members learn through education, training, and developmental opportunities that further individual, professional growth.

PATHWAYS (aka CAREER AND LEARNING PATHWAYS)

- *NOUN-PLURAL* (a) a predetermined group of courses within a discipline, or disciplines, that has been structured both sequentially and chronologically to create a streamlined course map that enable an expeditious path for students to the necessary training, experience, skill based certifications, certificate of completion, and/or degree necessary to prepare for entry into the workforce, or transfer into a higher education program of study.

PLAN

- *VERB* (a) to arrange the parts of; (b) to devise or project the realization or achievement of; (c) to have in mind.
- *NOUN* (a) a **method for achieving an end**; (b) an often customary method of doing something; (c) a detailed formulation of a program of action; (d) something that documents a goal or aim.

Plan Type	Time Horizon	Level of Detail/Example
Master	Long Term (>5 years)	Very high level concepts or aims (a vision for the future; view from 50k feet above; denotes BHAG = Big Hairy Audacious Goal; e.g., ***"VVC will become Aspen Award eligible in X years, and will win in X years"***).

Plan Type	Time Horizon	Level of Detail/Example
Strategic	Mid Term (3 to 5 years)	Still high level concepts or aims, but less BHAG (view from 25k feet above; aspirational goals acquired through a general set of activities and qualified outcomes; e.g., *"VVC will recruit, develop, and retain a high-quality and diverse staff"*).
Tactical (a/k/a "Action")	Quarters or Annual	Strategies are further specified as tasks or actions with measurable objectives clearly linked to strategic goals (e.g., *"HR will conduct and/or participate in 15 job fairs locally, regionally, and statewide each fiscal year"*).
Operational	Day-to-day or Cycle-specific	Administrative procedures or detailed steps for those tactics or tasks that are core functions for the responsible program/department (e.g., *AP 7120- Recruitment and Hiring Procedures,* or *AP6331-Purchasing Procedure,* or *Management Handbook,* or *Instructional Program Review Handbook*).

PORTFOLIO
- *NOUN* (a) a collection of projects or programs or other efforts grouped together to facilitate effective management of work to meet strategic objectives; projects or programs may not necessarily be interdependent or directly related.[1]

PROGRAM MAPPING / PROGRAM MAP
- *NOUN* (a) a process of compiling information about an academic program including but limited to its description; related careers or options for further study; awards conferred; required courses, as well as any co- and/or extracurricular experiences; student learning outcomes and linkages from course, to program, to the overall institution; the requisite or model sequence of courses students should follow; and any other information that can be used to assist students with their educational planning; (b) a document representing the information compiled in the program mapping process.

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[1] From Project Management Book of Knowledge

PROGRAM-COURSE MATRIX

- *NOUN* (a) in connection with VVC's enrollment management efforts, a document summarizing basic information about an academic program for the purpose of evaluating its performance and areas of improvement; program information includes but may not be limited to awards conferred over the last 3 to 5 years, related course offerings, when each course was last offered, credits awarded, any pre-requisite or co-requisites, relevance to general education requirements, other basic course information, as well as enrollment statistics and achievement outcomes over the last 3 to 5 years.

PROJECT

- *NOUN* (a) temporary endeavor undertaken to create a unique product or service; distinct from operations because they have a definite beginning and an end, and a limited duration.

RISK

- *NOUN* (a) uncertain event or condition that, if it occurs, has a positive or negative effect on objectives and/or outcomes.

SCAN

- *VERB* (a) to read or mark so as to show metrical structure; (b) to examine by point-by-point observation or checking; (c) to pass over in the formation of an image; (d) to examine systematically in order to obtain data especially for display or storage.
- *NOUN* (a) the act or process or scanning; (b) a radar or television trace; (c) an image formed by scanning something; (d) written document representing results from a systematic examination.

Scan Type	Description of Scope
Environmental Scan	The process of gathering information about events and their relationship to an organizations external and internal operating environments for the purpose of determining the future direction of the organization.
External Scan	Portion of an environmental scan that focuses on external factors outside the organization that impact its operations and performance.
Internal Scan	Portion of an environmental scan that focuses on internal factors related to an organization's programs, services, structures, procedures, etc. that impact its operations and performance.

STRATEGIC ADVANTAGES

- *NOUN* (a) aims or responses that an organization articulates to address major change or improvement in performance that must be achieved to remain viable and competitive in the long-term; defined in measureable terms and used to guide resource allocation.

STRATEGIC CHALLENGES

- *NOUN* (a) those pressures that exert a decisive influence on an organization's likelihood of future success, particularly in light of the anticipated, future competitive position relative to other like organizations/providers.

STRATEGIC PLANNING

- *NOUN* (a) process of defining an organization's direction and key strategies, and making decisions about resource allocation based on that planning. See "Strategic Plan" in table above under PLAN.

STRATEGY

- *NOUN* (a) a method, collection of activities, or plan of action designed to bring about a desired future, such as achievement of a goal or solution to a problem.

SWOT ANALYSIS

- *NOUN* (a) systematic, deep study of an organization's operating environment in terms of its internal state and external influences.
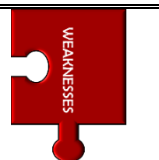
STRENGTHS	Attributes of the organization (*e.g.*, assets, resources, knowledge, skills, and abilities) that can be focused on building and expanding internal capabilities and capacities for current and future competitive success. ***Our institutional strengths can give VVC a*** STRATEGIC ADVANTAGE ***over the competition.***
WEAKNESSES	Conditions within the organization (*e.g.*, skills gaps, lack of expertise or other talents, ineffective use of resources) that prevent any building or expanding of internal capabilities and capacities, threatening current and future competitive success. ***Our institutional weaknesses present us with*** STRATEGIC CHALLENGES ***that may prevent VVC from being competitive.***
OPPORTUNITIES	Strategically important external conditions or prospects that arise out of such conditions through research, deliberation, out-of-the-box thinking, brainstorming, and other approaches to crafting a new vision for an organization's future; consideration of relative risk, financial and otherwise, and making intelligent choices is key. ***Emerging markets and other changes in our operating environment present us with*** STRATEGIC OPPORTUNITIES ***that should inform our re-imagining of the new-and-improved VVC.***
THREATS	External conditions or changes in the regulatory environment, marketplace demands, or fiscal declines that may be detrimental to an organization's programs or services. ***External drivers of our fiscal stability, viability of programs, or capacity to deliver services may pose*** STRATEGIC CHALLENGES ***that must be addressed or they will prevent us from achieving the new-and-improved VVC.***

Figure 1. Descriptions of Organizational Maturity (Baldrige Excellence Framework for Education, 2018-19)
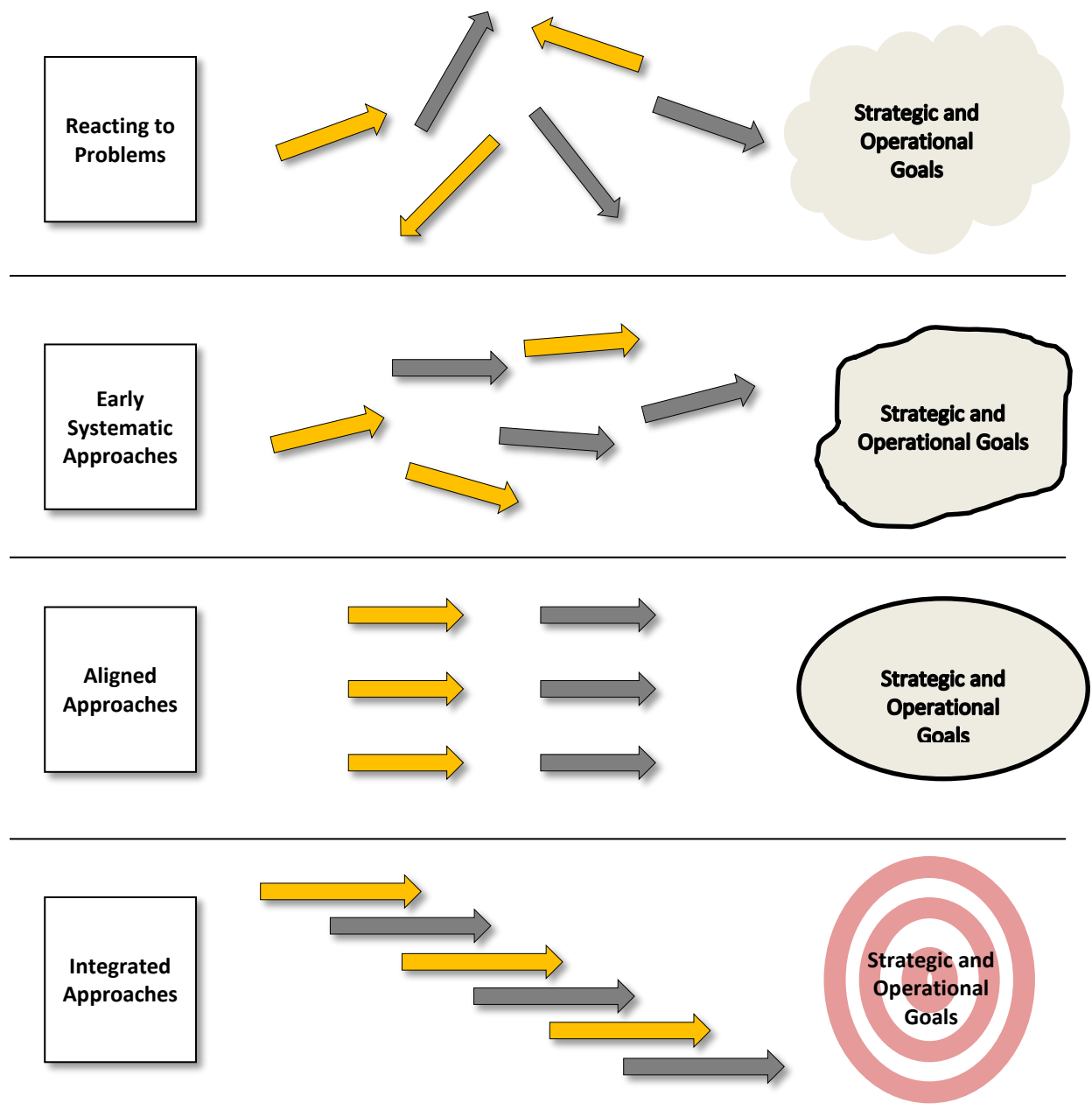
Figure 2. Descriptions of Organizational Learning (Baldrige Excellence Framework for Education, 2015-16)

From Fighting Fires to Innovation: An Analogy for Learning

Learning is an essential attribute of high-performing organizations. Effective, well-deployed organizational learning can help an organization improve from the early stages of reacting to problems to the highest levels of organization-wide improvement, refinement, and innovation.
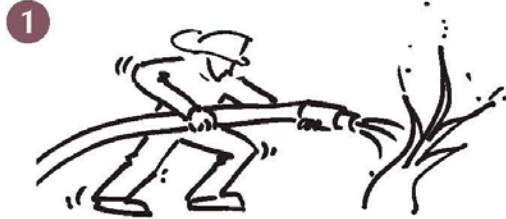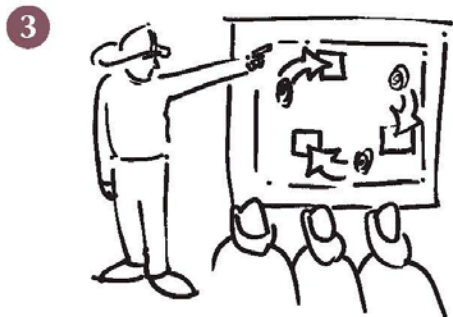
1

Reacting to the problem
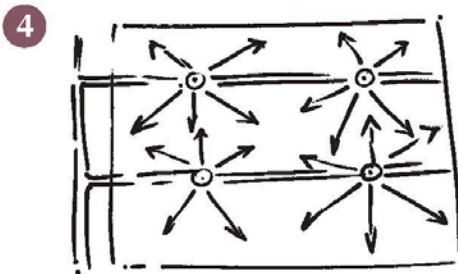Run with the hose and put out the fire.
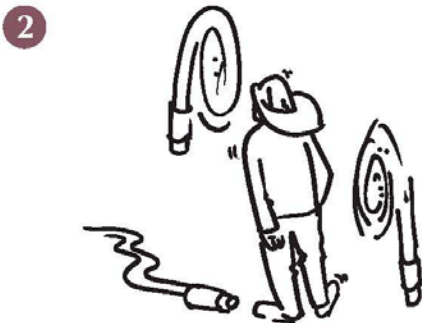
2

General improvement orientation
Install more fire hoses to get to the fires quickly and reduce their impact.

3

Systematic evaluation and improvement
Evaluate which locations are most susceptible to fire. Install heat sensors and sprinklers in those locations.

4

Learning and strategic improvement
Install systemwide heat sensors and a sprinkler system that is activated by the heat preceding fires.
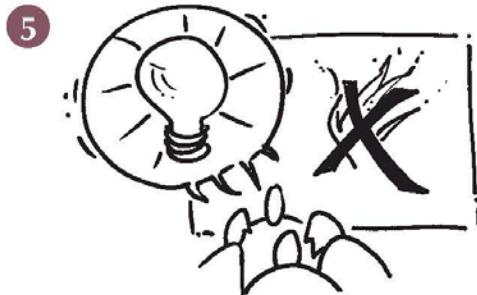
5

Organizational analysis and innovation
Use fireproof and fire-retardant materials. Replace combustible liquids with water-based liquids. Prevention is the primary approach for protection, with sensors and sprinklers as the secondary line of protection. This approach has been shared with all facilities and is practiced in all locations.