

# **HIGH PERFORMING WORKFORCE BOARDS**

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## **RESOURCE GUIDE**

**May 1, 2008**

# U SING THIS GUIDE

The Resource Guide provides detailed definitions, planning steps, and resources for strategic planning concepts integral to the management of a high performing organization and the High Performing Board Certification initiative.

Each concept in the resource guide was chosen because of its broad, cross-functional nature; each concept is integral to several of the HPWB criteria.

Each page of the resource guide contains three elements: 1) a “Definition” which consists of the most commonly accepted definition of the term used in both for-profit and non-profit settings; 2) a “Getting Started” section containing four to five best practices; and 3) a “Resources” section containing hyperlinks to the more in-depth resources for further information.

At the end of the resource guide is a “Glossary of Terms” and “List of Acronyms” containing a list of easily defined terms and acronyms used by the Massachusetts Department of Workforce Development.

**NOTE:**

DWD/DCS provides this list of resources as a service to its customers and is not responsible for the availability or content of these resource sites. DWD/DCS and its employees do not endorse, warrant or guarantee the products, services or information described or offered at these sites.

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# ASSET MAPPING

## DEFINITION

A disciplined, structured process of listing key community features in a defined geographic boundary designed to discover unique and unknown assets. It is the process by which the capacities of individuals, civic associations, indigenous resources, and local institutions are inventoried.

## GETTING STARTED...

- Focus on what you have; do not focus on problems, deficits, or what is lacking;
- Focus on local determination, investment, creativity, empowerment, and control; successful asset mapping involves and focuses on the agenda and problem-solving capacity of the *community*;
- Be creative; an asset can take many forms and asset mapping can be applied to many types of problems. For instance, some forms of mapping include: capitol mapping, cultural mapping, and community relationship mapping (for more information see Social Design Notes Blog “What is Asset Mapping” - [www.backspace.com/notes/2004/06/23/x.html](http://www.backspace.com/notes/2004/06/23/x.html))
- Start by identifying “gifts of individuals” – things such as their monetary resources, skills, specific talents, and networks. Next identify citizen associations, which should include both the informal – such as book groups – and the formal – such as the local Boy Scouts or Lion’s club. Lastly, identify local institutions including public and private organizations at the municipal, state, national, and regional level that are located in or serve the community.

## RESOURCES

- Asset-Based Community Development (ABCD) Institute at Northwestern University’s Community Development Program (John P. Kretzmann and John L. McKnight Institute)  
FOR MORE INFORMATION: [www.sesp.northwestern.edu/abcd/](http://www.sesp.northwestern.edu/abcd/)
- “Building Communities From the Inside Out: A Path Toward Finding and Mobilizing a Community’s Assets” by John P. Kretzmann and John L. McKnight  
FOR MORE INFORMATION: [www.sesp.northwestern.edu/abcd/pubs/relatedpubs/](http://www.sesp.northwestern.edu/abcd/pubs/relatedpubs/)
- “Mapping Community Assets Workbook” by Northwest Regional Educational Laboratory  
FOR MORE INFORMATION: [www.nwrel.org/nwreport/dec98/article8.html](http://www.nwrel.org/nwreport/dec98/article8.html)
- “Community Asset Mapping Trends and Issues Alert no. 47” by Sandra Kerka, Ohio State University Center on Education and Training for Employment  
FOR MORE INFORMATION: [www.cete.org/acve/docgen.asp?tbl=tia&ID=170](http://www.cete.org/acve/docgen.asp?tbl=tia&ID=170)
- “Asset Mapping: Locating Gifts in Your Community” by Holly DeDlois and Nicole LaPointe  
FOR MORE INFORMATION: [www.nhhealthpolicyinstitute.unh.edu/ec/ppt/03\\_asset-mapping.ppt#1](http://www.nhhealthpolicyinstitute.unh.edu/ec/ppt/03_asset-mapping.ppt#1)
- “Appreciative Inquiry” from The Free Management Library  
FOR MORE INFORMATION: [www.managementhelp.org/commmskls/appr\\_inq/appr\\_inq.htm](http://www.managementhelp.org/commmskls/appr_inq/appr_inq.htm)

# BENCHMARKS/INDICATORS

## DEFINITION

Measures of progress taken towards a goal, taken at intervals prior to the program's completion or the anticipated completion of the final goal. May include standards, critical success factors, indicators, and metrics.

## GETTING STARTED...

- Choose performance measures for your benchmarks that make sense to you and that are easy to understand. Measure only one indicator for each benchmark;
- Focus on indicators that measure real change or that have a real relationship to the end goal; don't just choose indicators that represent easy to obtain data.
- Be sure to establish baseline data before you begin implementing your intervention or program so that you can see the actual effect (if any) your changes are having.
- Establish benchmark targets – performance goals you are trying to reach for each benchmark.
- Publish a scorecard showing your benchmarking results; what has been your organization's progress towards both its organizational and benchmarking goals? Share the scorecard with partners and the community, and solicit feedback. If you are over-shooting all of your benchmarks or progressing faster than expected towards your end goal, you have set the bar too low. If you are falling behind, were the goals too ambitious or are there systemic issues impeding your progress?

## RESOURCES

- Bureau of Justice Assistance Center for Program Evaluation "Assessing Program Performance: Identifying Goals and Objectives"  
FOR MORE INFORMATION: [www.ojp.usdoj.gov/BJA/evaluation/guide/ap1.htm](http://www.ojp.usdoj.gov/BJA/evaluation/guide/ap1.htm)
- "Of Benchmarks and Scorecards: Reporting on Multiple Projects (short version)" by Alex S. Brown, PMP IPMA-C  
FOR MORE INFORMATION: <http://www.alexsbrown.com/benchscore-short.html>
- "Using Benchmarks to Monitor Community Progress" (powerpoint) by J. Norman Reid, Office of Community Development, United States Department of Agriculture Rural Development  
FOR MORE INFORMATION: [www.rurdev.usda.gov/rbs/ezec/Pubs/usebmks.pdf](http://www.rurdev.usda.gov/rbs/ezec/Pubs/usebmks.pdf)
- "A Guide to Implementation and Benchmarking for Rural Communities" (broad information not just for rural communities) United States Department of Agriculture Rural Development Office of Community Development  
FOR MORE INFORMATION: [www.ezec.gov/About/benchmark.pdf](http://www.ezec.gov/About/benchmark.pdf)

# BUSINESS PLAN

## DEFINITION

A document that summarizes the operational and financial objectives of a new business or project, and which contains the detailed plans and budgets showing how the objectives are to be realized. A business plan should contain detailed financial projections, forecasts about your business's performance, and a marketing plan. The business plan is considered an internal document that will be used as a road map to guide the organization's functioning. The business plan is also used as a proposal to secure funding from outside investors as well.

## GETTING STARTED...

- The written business plan is the final product of concrete business or strategic planning. Business and strategic planning are synonymous terms. The business plan should only be written after comprehensive business planning has taken place.
- Know your audience: for-profit business plans are intended for potential investors; non-profit business plans are intended for funders, board members, staff, program beneficiaries, and the larger community served by the organization.
- The written business plan will be used to make decisions (such as “green-light” and funding decisions) about starting a new venture, expanding the organization's services, mergers or acquisitions of businesses, or making a change in the management of an organization. In a nonprofit venture, a business plan is very similar to a grant proposal.
- Business plans vary in length but generally follow consistent guidelines for form and content. The business plan should describe, in detail: the venture, research justifying that the venture is viable (including market research that outlines the need for the venture as well as the competition), management plans, staffing plans, and financial plans (including a detailed budget, a breakdown of all costs, a debt-management plan, and plans for future growth and expansion). You can find many detailed business plan examples online.

## RESOURCES

- “Business Plan Outline” from About.Com (also links to sample business plans and tips to writing business plans)
- **FOR MORE INFORMATION:** <http://sbinfoCanada.about.com/cs/businessplans/a/bizplanoutline.htm>
- Resources for Writing a Business Plan from the U.S. Small Business Administration  
**FOR MORE INFORMATION:** [www.sba.gov/smallbusinessplanner/plan/writeabusinessplan/index.html](http://www.sba.gov/smallbusinessplanner/plan/writeabusinessplan/index.html)
- Business Planning (for nonprofits for for-profits) from Free Management Library  
**FOR MORE INFORMATION:** [www.managementhelp.org/plan\\_dec/bus\\_plan/bus\\_plan.htm](http://www.managementhelp.org/plan_dec/bus_plan/bus_plan.htm)
- Series of articles on business plan components from Entrepreneur.com  
**FOR MORE INFORMATION:** [www.entrepreneur.com/encyclopedia/term/82322.html](http://www.entrepreneur.com/encyclopedia/term/82322.html)

# CAPACITY BUILDING

## DEFINITION

Activities that increase an individual's, population's, or community's ability for growth, development, or accomplishment on a sustainable basis. Includes efforts to develop human skills or societal infrastructure within a community or organization needed to achieve goals. It is the process of developing or acquiring skills, competencies, tools, and resources that improve nonprofit effectiveness. There are three types of capacity building: assessment, technical assistance, and financial investment (see also technical assistance in this guide).

## GETTING STARTED...

- Determine your capacity building needs by completing a thorough and honest needs assessment.
- Capacity building can be performed on the organization's aspirations, strategies, organizational skills, human resources, systems and infrastructure, organizational structure, or culture. Effective capacity building is aligned and interconnected.
- An environmental scan can be useful in determining the infrastructure and resources in the community that are available to build nonprofit capacity.
- The technical assistance agreement should include a work plan with objectives and measurable outcomes that are agreed to by both parties. Each party should have assigned tasks to avoid confusion.
- Be sure to have a formal evaluation process following the completion of the technical assistance agreement that allows all parties a chance to review the collaboration.

## RESOURCES

- Capacity Building from Free Management Library  
FOR MORE INFORMATION: [www.managementhelp.org/org\\_perf/capacity.htm](http://www.managementhelp.org/org_perf/capacity.htm)
- "Lessons From the Street: Capacity Building and Replication" by the Milton S. Eisenhower Foundation  
FOR MORE INFORMATION: [www.eisenhowerfoundation.org/aboutus/publications/lessons\\_intro.html](http://www.eisenhowerfoundation.org/aboutus/publications/lessons_intro.html)
- "Writing Proposals for Capacity Building" by Susan Chandler  
FOR MORE INFORMATION: [www.tgci.com/magazine/Writing%20Proposals%20for%20Capacity%20Building.pdf](http://www.tgci.com/magazine/Writing%20Proposals%20for%20Capacity%20Building.pdf)
- "Evaluating Capacity-Building Efforts for Nonprofit Organizations" by Paul Connolly and Peter York  
FOR MORE INFORMATION: [www.ucsf.edu/aetcnec/evaluation/Connolly\\_CapacityBuilding\\_02.pdf](http://www.ucsf.edu/aetcnec/evaluation/Connolly_CapacityBuilding_02.pdf)
- Capacity Building for Nonprofit Organizations: A Resource List  
FOR MORE INFORMATION: <http://foundationcenter.org/getstarted/topical/capacity.html>
- "Effective Capacity Building in Nonprofit Organizations" by McKinsey & Company  
FOR MORE INFORMATION: [www.vpppartners.org/learning/reports/capacity/full\\_rpt.pdf](http://www.vpppartners.org/learning/reports/capacity/full_rpt.pdf)

# CONTINUOUS QUALITY IMPROVEMENT (CQI)

## DEFINITION

Organizational paradigm of continuous improvement by seeking customers' service requirements and ensuring the organization is capable of meeting them. CQI focuses on improving the processes by which services or products are produced, as well as the quality of the service or product itself. CQI is the commitment to constantly improve operations, processes, and activities in order to meet customer requirements in an efficient, consistent and cost effective manner. Also referred to as Total Quality Management.

## GETTING STARTED...

- Organizations wishing to adopt a CQI culture should familiarize themselves with both Edward Deming's 14 points and his system of profound knowledge.
- The basis for continuous quality improvement is a belief that the customer defines quality (not us) and that we can only know the customer's definition of quality by asking them (and by asking frequently).
- Before beginning any project, identify all customers – both internal and external (downstream departments that will make use of the work you produce are also considered customers) – of the project and obtain their definition of quality for the work or outputs produced. Work with the goal of meeting or exceeding their expectations.
- In a CQI organization, all decisions are *evidence-based*. The need for process improvement and the success of process improvement is based on *objective* data which has been collected and analyzed. Be sure to establish baseline data before you begin implementing your intervention or process improvement so that you can see the actual effect (if any) your changes are having.

## RESOURCES

- Continuous Improvement from Free Management Library  
FOR MORE INFORMATION: [www.managementhelp.org/quality/cont\\_imp/cont\\_imp.htm](http://www.managementhelp.org/quality/cont_imp/cont_imp.htm)
- Deming's 14 Points by Phil Cohen  
FOR MORE INFORMATION: <http://hci.com.au/hcisite3/articles/deming.htm>
- Deming's Theory of Profound Knowledge by James R. Martin  
FOR MORE INFORMATION: <http://maaw.info/DemingExhibit.htm>
- "Continuous Quality Improvement and CCISC: Philosophy, Process, and Technique of Systems Change" (powerpoint) presented by Kenneth Minkoff, MD and Christine A. Cline  
FOR MORE INFORMATION: [www.hss.state.ak.us/dbh/system\\_redesign/print/Continuous%20Quality%20Improvement.pdf](http://www.hss.state.ak.us/dbh/system_redesign/print/Continuous%20Quality%20Improvement.pdf)
- "The Role of Process Improvement in the Nonprofit Organization" by Vikki C. Lassiter  
FOR MORE INFORMATION: [http://repository.upenn.edu/cgi/viewcontent.cgi?article=1004&context=od\\_theses\\_msod](http://repository.upenn.edu/cgi/viewcontent.cgi?article=1004&context=od_theses_msod)



# DELIVERABLE

## DEFINITION

Any tangible outcome – both product and activity – that is produced by a project. These can be documents, plans, computer systems, workshops, reports, learning objectives, processes, etc. It is any aspect of a proposal that a provider commits to do or supply, and is usually clearly measurably.

## GETTING STARTED...

- Deliverables are created in support of objectives. Deliverables are the tangible products that will be produced when the project (or a phase of the project) has met its objectives. Deliverables should only be created after the objectives have been defined.
- Be sure to identify all project stakeholders and receive consensus on the deliverables for each phase of the project before the project starts. Receive stakeholders' approval that each deliverable has been met to their satisfaction at each phase of the project before moving on to the next phase.
- Describe your deliverables in tangible, quantifiable, and measurable terms. Define the test, review, or inspection steps that will verify that the deliverable has been met, including the validation definition, the acceptance criteria, and the approving authority.
- You may also want to include a description of what your deliverable is not or what will not be included in the deliverable to ensure that all parties are clear about what the outcome will be.
- A deliverable, which is tangible, differs from a milestone in that milestones are scheduled events signifying the completion of a major event and consist of zero effort (they are symbolic).

## RESOURCES

- "The Project Manager's Partner: A Step-By-Step Guide to Project Management" by Michael Greer (excerpts)  
**FOR MORE INFORMATION:** [http://books.google.com/books?id=eO2JABrPbjAC&pg=PA14&lpg=PA14&dq=creating+deliverables&source=web&ots=b-V36z\\_seb&sig=sbBPQEUI9oqCisF2-fz5sar15i4&hl=en#PPA9,M1](http://books.google.com/books?id=eO2JABrPbjAC&pg=PA14&lpg=PA14&dq=creating+deliverables&source=web&ots=b-V36z_seb&sig=sbBPQEUI9oqCisF2-fz5sar15i4&hl=en#PPA9,M1)
- Project Manager's Tips  
**FOR MORE INFORMATION:** <http://pmtips4u.blogspot.com/2007/05/project-life-cycle.html>
- "Project Management 101: Fundamental Project Concepts: Part 2 Deliverables" by Jason Kalra  
**FOR MORE INFORMATION:** [www.suite101.com/lesson.cfm/17517/891/3](http://www.suite101.com/lesson.cfm/17517/891/3)
- "Make Sure Your Project Deliverables Are Aligned to Your Objectives" by Tom Mochal  
**FOR MORE INFORMATION:** <http://blogs.techrepublic.com.com/project-management/?p=127&tag=rbxccntr1>
- "Real World Project Management: Managing the Project Scope: Creating the Work Breakdown Structure" by Joseph Phillips  
**FOR MORE INFORMATION:** <http://www.ciscopress.com/articles/article.asp?p=363892&seqNum=3>

# ENVIRONMENTAL SCAN

## DEFINITION

The process of acquiring and using information about events, trends, and relationships in an organization's external environment, the knowledge of which would assist management in planning the organization's future course of action. Knowledge gained from such scans is used to avoid surprises, identify threats and opportunities, gain competitive advantage, and improve long- and short-term planning. Environmental scanning includes looking for information (searching), analysis and interpretation of this information, and the use of this information in strategic decision making. There are four styles of scanning: undirected viewing, conditioned viewing, informal search, and formal search.

## GETTING STARTED...

- Because the external environment of an organization includes all outside factors that can affect the performance or survival of the organization, it can be helpful to divide these factors into a small number of “arenas” or “landscapes”; commonly used sectors are: customers, suppliers, competition, socioeconomic, technological, and governmental (legal/regulatory).
- Before conducting an environmental scan, identify all of the variables that can positively or negatively affect organizational performance such as customer satisfaction level, interest rates, product competition, unemployment rates, and demographic changes.
- There are no hard and fast rules for conducting an environmental scan. They can be as informal as scanning the newspaper every day to as formal as conducting an eighteen month research study that includes surveys and focus groups.
- No matter how you conduct your scan, the most important elements are planning (how will you conduct the scan and what sources will you use), consistency (how often will you scan) to avoid being blindsided, analysis (how does the information retrieved affect your organization and how will your organization respond), and involvement of stakeholders (ensuring the analysis is distributed to stakeholders).

## RESOURCES

- “Information Management for the Intelligent Organization: Chapter 4 Environmental Scanning as Strategic Organizational Learning” by Chun Wei Choo  
FOR MORE INFORMATION: <http://choo.fis.utoronto.ca/FIS/IMIO/IMIO.html>
- Environmental Scanning by James L. Morrison  
FOR MORE INFORMATION: <http://horizon.unc.edu/courses/papers/enviroscan/>
- “Look Out! Environmental Scanning for Associations” by Carol Humphries  
FOR MORE INFORMATION: [www.axi.ca/tca/may2004/associatearticle\\_1.shtml](http://www.axi.ca/tca/may2004/associatearticle_1.shtml)
- “And Justice for All: Designing Your Business Case for Integrating Justice Information, Appendix A.1” Center for Technology in Government  
FOR MORE INFORMATION:  
[www.ctg.albany.edu/publications/guides/and\\_justice\\_for\\_all?chapter=6&PrintVersion=2](http://www.ctg.albany.edu/publications/guides/and_justice_for_all?chapter=6&PrintVersion=2)

# FUND RAISING

## DEFINITION

The process of soliciting and gathering money, resources, or other benefits in-kind by requesting donations from individuals, businesses, charitable foundations, or government agencies.

## GETTING STARTED...

- Fundraising activities flow from specific organizational or business needs tied to the organization's mission and strategic plan. Fundraising activities should only be undertaken after all strategic planning activities have been completed.
- Fundraising activities should only be undertaken for projects or programs that are clearly linked to the organization's strategic plan. Resist the urge to apply for funding opportunities simply "because" "the funding opportunity is there." The strategic plan fuels the need for funding, not the other way around.
- Before undertaking a major fundraising campaign, consider conducting a fundraising feasibility study. Performed by an independent consultant, a fundraising feasibility study is an objective survey of the community that assesses the potential success of a fundraising project, identifies fundraising strategies, and identifies potential funders.
- It is better to submit a few well-researched and well-crafted proposals to a select number of local foundations that are a good match for your program or organization than to "throw as many against the wall and see what sticks." Grant funding, like all other forms of fundraising, is about relationship cultivation. Foundations want to see a personal connection between their work and your organization's or project's mission.

## RESOURCES

- "Nonprofit Fundraising and Grant writing" from Free Management Library  
FOR MORE INFORMATION: [www.managementhelp.org/fndrsng/np\\_raise/np\\_raise.htm](http://www.managementhelp.org/fndrsng/np_raise/np_raise.htm)
- "Check Out Your Organization's Fund-Raising Readiness and Learn The Secret of Fund-Raising Success" by Tony Poderis (click on "Forum Library" for more articles)  
FOR MORE INFORMATION: [www.raise-funds.com/a98forum.html](http://www.raise-funds.com/a98forum.html)
- "How Board Members Can Become Effective Fund Raisers" by Tony Poderis  
FOR MORE INFORMATION: [www.raise-funds.com/111203forum.html](http://www.raise-funds.com/111203forum.html)
- Grant Writing Confidential (blog)  
FOR MORE INFORMATION: <http://blog.seliger.com/>
- Board Café Articles on Fundraising by CompassPoint Nonprofit Services (click on archives for articles)  
FOR MORE INFORMATION: [www.compasspoint.org/boardcafe/index.php](http://www.compasspoint.org/boardcafe/index.php)
- Fundraising Best Practices for Nonprofits from Whatcom Council of Nonprofits  
FOR MORE INFORMATION: [www.wcnwebsite.org/practices/collaborative.htm](http://www.wcnwebsite.org/practices/collaborative.htm)

## DEFINITION

Broad statements written in general terms that identify intended short and long term results or ideal future conditions. Transforms the organization's vision statement into general statements of strategic direction. The convention of Vision-Goals-Objectives (or alternatively Goals-Objectives-Tasks) holds that goals should be general statements of themes or direction, either measurable or not measurable. They represent a broad commitment to intentions and aspirations. Goals, along with objectives, are the results that will be achieved.

## GETTING STARTED...

- Goals flow from your vision or mission statement; therefore goals cannot be established until you have created a vision and/or mission statement for what you are trying to achieve.
- SMART goal setting techniques will help you achieve your goals. Each of your goals should follow the SMART traditional taxonomy: Specific, Measurable, Achievable, Realistic, and Timely or the growth-oriented taxonomy: Stretching, Motivational, Action-Oriented, Results-Oriented, and Tangible) [see also **S.M.A.R.T.** in this resource guide]
- Goals are general statements of results that include the population (who will be affected) and the opportunity (what you are attempting to change). They differ from objectives in that your objectives will contain the outcomes and results of your goals.
- Goal-Setting Tips:
  - Specific and Measurable: time deadlines, dollar amounts, etc.
  - Realistic and Attainable: make it stretch outside your comfort zone, but not so far that you can not attain it.

## RESOURCES

- "Business Plan Outline" from About.Com (also links to sample business plans and tips to writing business plans)  
FOR MORE INFORMATION: <http://sbinfoCanada.about.com/cs/businessplans/a/bizplanoutline.htm>
- Resources for Writing a Business Plan from the U.S. Small Business Administration  
FOR MORE INFORMATION: [www.sba.gov/smallbusinessplanner/plan/writeabusinessplan/index.html](http://www.sba.gov/smallbusinessplanner/plan/writeabusinessplan/index.html)
- "Using Benchmarks to Monitor Community Progress" (powerpoint) by J. Norman Reid, Office of Community Development, United States Department of Agriculture Rural Development  
FOR MORE INFORMATION: [www.rurdev.usda.gov/rbs/ezec/Pubs/usebmks.pdf](http://www.rurdev.usda.gov/rbs/ezec/Pubs/usebmks.pdf)
- "A Guide to Implementation and Benchmarking for Rural Communities" (broad information not just for rural communities) United States Department of Agriculture Rural Development Office of Community Development  
FOR MORE INFORMATION: [www.ezec.gov/About/benchmark.pdf](http://www.ezec.gov/About/benchmark.pdf)

# LABOR MARKET ANALYSIS

## DEFINITION

A five-part process to 1) identify the area within which employers are competing for labor, 2) conduct or participate in market surveys with the labor market to determine the salaries being paid for specific positions, 3) identify market trends such as market for skilled labor, ancillary pay, and merit and pay practices, 4) establish, adjust, and/or recommend changes to recruiting salary, and/or structures for staff positions, and 5) consult with management on their workforce needs. A labor market analysis combines elements of an **environmental scan** and a **SWOT** analysis (see these terms in this resource guide).

## GETTING STARTED...

- A labor market area is generally defined by commuting patterns but may be defined other ways. See “Defining an Economic Region” by M. Henry Robison ([www.economicmodeling.com/resources/wp-content/uploads/2007/10/wp\\_defining\\_functional\\_economic\\_region.pdf](http://www.economicmodeling.com/resources/wp-content/uploads/2007/10/wp_defining_functional_economic_region.pdf))
- Begin by conducting an environmental scan to determine all sources of labor market information. Employer surveys are costly and have a high failure rate. Very often they are unnecessary because the data is already available.
- If you are missing only a few pieces of data, you can obtain the data through employer focus groups instead of an employer survey.
- Use the data to conduct a SWOT analysis to identify future gaps in the talent pipeline or workforce development pipeline (see also **Pipeline** in this reference guideline). Your analysis should look at employer needs in the short, mid, and long term, up to twenty years out. Develop strategies for dealing with any potential labor shortages or gluts based on your labor market analysis.

## RESOURCES

- Occupational Supply/Demand Analysis: Approaches and Concerns  
FOR MORE INFORMATION: <http://socrates.cdr.state.tx.us/iSocrates/Files/SupplyAndDemandAnalysis.pdf>
- State of Massachusetts Labor and Workforce Development at Mass.Gov  
FOR MORE INFORMATION: <http://lmi2.detma.org/Lmi/LMIDataProg.asp>
- America's Career Kit sponsored by the U.S. Department of Labor provides information such as occupational, demographic and labor market information at the local, state, and national levels. The site is searchable by demographic location and occupation name.  
FOR MORE INFORMATION: [America's Career InfoNet \(ACINet\)](#)
- “10 Ways Not to Conduct a Market Salary Study” by Becky Regan  
FOR MORE INFORMATION: <http://ezinearticles.com/?10-Ways-Not-To-Conduct-A-Market-Salary-Study&id=833300>
- “Using Employer Surveys in Labor Market Planning: When and How to Conduct Surveys for Local Workforce Development Programs” by  
FOR MORE INFORMATION: <http://www.labormarketinfo.edd.ca.gov/article.asp?ARTICLEID=667>

# LEVERAGED FUNDING/RESOURCES

The ability of both the private and/or public sector to maximize available capital, financial, and human resources through joint partnerships and collaboration. Leveraged funding is often a requirement of grant applications, with grantors having outside match requirements in order to increase the sustainability of projects through the creation of community partnerships.

## GETTING STARTED...

- Leveraging funds provides an increased resource that optimally maximizes fund raising efforts and the desired financial revenue (also refer to Fundraising in this resource guide).
- Leveraging, like partnerships, is about the whole being greater than the sum of its parts. Both monetary funds and resources, such as staffing, infrastructure, and time, can be leveraged. Leveraging can take many forms, such as federal and non-federal grants, partnerships with cost sharing, matching, or in-kind contribution agreements, and fee-for-service activities (see also **Partnership** in this resource guide).
- Leveraging funds and/or fundraising is all about multiple streams of monetary resources; the goal is to develop immediate financial resources as well as residual financial resources.
- Leveraging plans should be spelled out in your annual plan with goals, roles and responsibilities, detailed strategies for achieving goals, and measures of success. You should start with a review of past results and then strategize about how to do better this year.

## RESOURCES

- Find Grant Opportunities at Grants.Gov  
FOR MORE INFORMATION: <http://www.grants.gov/>
- Find Grants and Contracts at U.S. Department of Labor - ETA  
FOR MORE INFORMATION: <http://www.doleta.gov/findit.cfm>
- Leverage Funds Through Matching, or Cost Sharing Defined at 29 CFR 97.24  
FOR MORE INFORMATION: [www.dol.gov/dol/allcfr/Title\\_29/Part\\_97/29CFR97.24.htm](http://www.dol.gov/dol/allcfr/Title_29/Part_97/29CFR97.24.htm)
- Leverage Funds Through Earned Income Defined at 29 CFR 97.25  
FOR MORE INFORMATION: [http://www.dol.gov/dol/allcfr/Title\\_29/Part\\_97/29CFR97.25.htm](http://www.dol.gov/dol/allcfr/Title_29/Part_97/29CFR97.25.htm)
- Find Grant Opportunities at Small Business Association, SBA.Gov  
FOR MORE INFORMATION: [www.sba.gov/services/financialassistance/grants/index.html](http://www.sba.gov/services/financialassistance/grants/index.html)

# MISSION STATEMENT

A short, memorable description of a company's fundamental purpose. An organization's mission statement answers the question "Why are we here?" The mission statement reflects the organization's opportunities, capabilities, and values. The difference between a mission statement and a vision statement is that a mission statement focuses on a company's present state while a vision statement focuses on a company's future.

## GETTING STARTED...

- The mission statement is the primary objective of the business – it tells you where the company is now.
- The mission statement is a call to action by each employee and aligned with the company's core values. It is used to keep the company focused on its purpose and to keep it on track during times of crisis.
- The mission statement is a measurable, definable, tangible goal that everyone knows.
- The mission statement should have emotional appeal and be simple to understand. The two generally accepted standards are "the mother test" (your company's mission statement should be understandable to your mother) and the "ten year old test" (your mission statement should be understandable to the average ten year old).
- The mission statement is brief and gets to-the-point quickly; it should be no more than a paragraph in length.

## RESOURCES

- "Strategic Planning" from Wikipedia, the free encyclopedia  
FOR MORE INFORMATION: <http://en.wikipedia.org/wiki/Objectives>
- Writing a "Meaningful Mission Statement" from About.Com  
FOR MORE INFORMATION: <http://sbinformation.about.com/cs/businessplans/a/mission.htm>
- "Developing a Mission Statement" from Business Owners Toolkit at Toolkit.Com  
FOR MORE INFORMATION: [http://www.toolkit.com/small\\_business\\_guide/sbg.aspx?nid=P03\\_4001](http://www.toolkit.com/small_business_guide/sbg.aspx?nid=P03_4001)
- "Follow Your Mission (Statement)" from Small Business Review.Com  
FOR MORE INFORMATION: [http://smallbusinessreview.com/management/follow\\_your\\_mission\\_statement/](http://smallbusinessreview.com/management/follow_your_mission_statement/)
- "Strategic Planning: Terminology to Help You" by Nova Scotia Agricultural College  
FOR MORE INFORMATION: <http://nsac.ca/admin/stratplan/terms.asp>
- "Basics of Developing Mission, Vision and Values Statements" from Free Management Library  
FOR MORE INFORMATION [www.managementhelp.org/plan\\_dec/str\\_plan/stmnts.htm](http://www.managementhelp.org/plan_dec/str_plan/stmnts.htm)
- "Build a Strategic Framework: Mission Statement:, Vision, Values..." from About.com  
FOR MORE INFORMATION <http://humanresources.about.com/cs/strategicplanning1/a/strategicplan.htm>



# OBJECTIVE(S)

## DEFINITION

The breakdown of a goal down into measurable units/tasks. “Results,” “outcomes,” or “products” that can be counted, appraised, or judged as being completed. Since objectives emanate from goals, achieving an objective - as shown by measurements - can be equated to achieving a goal or part of a goal. Objectives are usually “milestones”. Objectives, along with goals, are the results that will be achieved.

## GETTING STARTED...

- Objectives flow from goals, which flow from a mission or vision statement. Therefore, objectives can only be written when these other strategic planning steps have been completed.
- Like goals, objectives should follow the S.M.A.R.T. traditional taxonomy (Specific, Measurable, Action-Oriented, Realistic, and Timely) or the growth-oriented taxonomy: Stretching, Motivational, Action-Oriented, Results-Oriented, and Tangible) [see also **S.M.A.R.T.** in this resource guide]
- Objectives differ from goals in that goals are broad, general statements of strategic vision; objectives are measurable and results-oriented breakdowns of goals.
- Your objectives should contain results (the what), criteria (how much), time frame (by when), target (who will be affected), and outcome (what will happen).

## RESOURCES

- “Strategic Planning: Terminology to Help You” by Nova Scotia Agricultural College  
FOR MORE INFORMATION: <http://nsac.ca/admin/stratplan/terms.asp>
- “Writing Goals and Objectives” by Donna Drewes, PP, Municipal Land Use Center at The College of New Jersey  
FOR MORE INFORMATION:  
[www.tcnj.edu/~mluc/community/documents/grantswkshopgoalsandobjectives.pdf](http://www.tcnj.edu/~mluc/community/documents/grantswkshopgoalsandobjectives.pdf)
- “Writing SMARTER Objectives” from rapidbi.com  
FOR MORE INFORMATION: <http://www.rapidbi.com/created/WriteSMARTobjectives.html>
- The Practice of Leadership from thepracticeofleadership.net (strategies for simplifying management)  
FOR MORE INFORMATION: <http://www.thepracticeofleadership.net/>
- “Management by Objectives” from Wikipedia, the free encyclopedia  
FOR MORE INFORMATION: [http://en.wikipedia.org/wiki/Management\\_by\\_objectives](http://en.wikipedia.org/wiki/Management_by_objectives)
- Strategic Planning from Wikipedia, the free encyclopedia  
FOR MORE INFORMATION: <http://en.wikipedia.org/wiki/Objectives>



# OPERATING/OPERATIONAL PLAN

## DEFINITION

An annual work plan. It describes short-term business strategies and how the organization's **strategic plan** will be put into operation (or what portion of a strategic plan will be addressed) during a given operational period (typically a fiscal year). An operational plan is also the basis for and justification of an annual operating budget request. An organization's **business plan** and operating plan will be very similar; generally the business plan is written before start-up of the organization or before the start-up of new programs, products, or services and is intended for outside entities (such as funders or board members), while the operating plan is an internal document and is updated annually.

## GETTING STARTED...

- An organization should have annual operating plans that corresponds to its fiscal year.
- The plan ensures everyone knows what needs to get done, coordinates their efforts when getting it done, and can keep close track of whether and how it got done...
- Once the operational plan is completed, it needs to be thoroughly communicated and progress tracked on a regular basis.
- There are three important attributes to good operating plan:
  - an appropriate level of detail -- enough to guide the work, but not so much that it becomes overwhelming, confusing, or unnecessarily constrains creativity
  - a format that allows for periodic reports on progress toward the specific goals and objectives
  - a structure that coincides with the strategic plan -- the goal statements for the strategic plan and the operating plan are one and the same; the objective statements for the strategic plan and the operating plan will be different

## RESOURCES

- "How Do You Develop an Annual Operating Plan?" FAQ for Operating Plans from Alliance for Nonprofit Management  
**FOR MORE INFORMATION:** [http://www.allianceonline.org/FAQ/strategic\\_planning/how\\_do\\_you\\_develop\\_annual.faq](http://www.allianceonline.org/FAQ/strategic_planning/how_do_you_develop_annual.faq)
- "Business Operational Plan: How You Going To Run Your Business" by Business-Plans-Guides.com  
**FOR MORE INFORMATION:** <http://www.business-plans-guide.com/operational-plan.html>
- "Creating a Business Plan Step by Step" by Jean Murray from About.com  
**FOR MORE INFORMATION:** [http://biztaxlaw.about.com/od/financingyourstartup/ss/bizplansteps\\_7.htm#](http://biztaxlaw.about.com/od/financingyourstartup/ss/bizplansteps_7.htm#)

# PARTNERSHIP

## DEFINITION

The formation of a cross-sector alliance in which individuals, groups, or organizations agree to work together, sharing the risks as well as the benefits to fulfill an obligation or undertake a specific task. True partnerships will 1) be greater than the sum of their parts, 2) incorporate learning and adapt to change, 3) have transparent communication and leadership, 4) be based on mutually agreed upon objectives, 5) share risks and benefits, 6) be voluntary and equitable ("The Partnership Broker's Tool Book" by L. George and K. Madden)

## GETTING STARTED...

- Partnerships can be structured in many ways, from informal workgroups, slightly formal networks or societies, to formal associations, foundations, or agencies. It's important that all of the partners understand and agree to the structure of your partnership ahead of time. The structure can evolve over time to meet changing needs.
- The core principles of a partnership is that there is equity among all partners, openness and honesty among all partners, and be mutual benefits.
- Be creative in maximizing the time and resources that different people bring to the partnership. Keep a list of potential members and maintain regular communication to involve them at different stages.
- The aim of partnerships is to assess the needs of the community and develop a coordinated response to these needs.

## RESOURCES

- The Partnering Tool Book  
FOR MORE INFORMATION: [www.undp.org/partners/business/PartneringToolbook%5B1%5D.pdf](http://www.undp.org/partners/business/PartneringToolbook%5B1%5D.pdf)
- Why Is It Important to Develop a Community Partnership?  
FOR MORE INFORMATION: <http://guide.helpingamericasyouth.gov/partnerships.htm>
- Make a Partnership Work With Attention to Details by Rhonda Abrams  
FOR MORE INFORMATION: [www.usatoday.com/money/smallbusiness/columnist/abrams/2006-03-23-partnership\\_x.htm](http://www.usatoday.com/money/smallbusiness/columnist/abrams/2006-03-23-partnership_x.htm)
- Lessons in Collaboration: How to Make a Partnership Work  
FOR MORE INFORMATION: [www.nationaltechcenter.org/index.php/2005/10/20/lessons-in-collaboration-how-to-make-a-partnership-work/](http://www.nationaltechcenter.org/index.php/2005/10/20/lessons-in-collaboration-how-to-make-a-partnership-work/)
- How to Develop Partnerships – A Brief Guide  
FOR MORE INFORMATION: [www.envision.ca/pdf/Vol2-Appex7.PDF](http://www.envision.ca/pdf/Vol2-Appex7.PDF)
- Collaborative/Partnerships Best Practices for Nonprofits from Whatcom Council of Nonprofits  
FOR MORE INFORMATION: [www.wcnwebsite.org/practices/collaborative.htm](http://www.wcnwebsite.org/practices/collaborative.htm)

# PARTNERSHIP BROKERING

## DEFINITION

The use of an intermediary or “go-between” to form and/or sustain a partnership. The broker can be an individual or an organization and can be either internal (can work for one of the participating partner organizations) or external (can be an independent third party). The broker’s role may include bringing the parties together, inspiring others to work together, building collaboration between partners, encouraging the adoption of behaviors that enable the partnership to function effectively, facilitating the development of a shared vision, assisting in the development of a partnership process, protecting the principles and vision of the partnership, and keeping the parties focused throughout the partnership until the outcomes are achieved.

## GETTING STARTED...

- A broker can be used at any or all stages of a partnership.
- A good broker has a vision of what the partnership is trying to accomplish, is committed & engaged to the outcome of the partnership (but is a neutral party), has good interpersonal/people skills, superb project management, and excellent administrative skills.
- All parties to a partnership, including the broker, should have clearly defined roles and responsibilities. If the broker is to have a time-limited role, it should be clear when the broker’s role will end and who will take over the responsibilities currently carried by the broker.
- There are many different types of facilitation styles a partnership broker can use – from independent and directive to laid back and coordinative. Be sure to pick a broker whose style matches your groups.

## RESOURCES

- “The Brokering Guidebook” from the International Business Leaders Forum  
FOR MORE INFORMATION: <http://shop.iblf.org/DisplayDetail.aspx?which=21>
- Partnership 101: An Introduction to Effective Partnering for Sustainable Development from The Partnering Initiative  
FOR MORE INFORMATION: <http://www.un.org/esa/sustdev/csd/csd15/lc/partnering101.pdf>
- The Tool Book Collection from The Partnering Initiative (four resource guides)  
FOR MORE INFORMATION: <http://thepartneringinitiative.org/mainpages/rb/toolbooks/>
- “The Brokering Guidebook: Navigating Effective Sustainable Development Partnerships”  
FOR MORE INFORMATION: [www.undp.un.hn/unv/docs/Brokering\\_Handbook.pdf](http://www.undp.un.hn/unv/docs/Brokering_Handbook.pdf)

# PERFORMANCE MEASURE(S)

## DEFINITION

Qualitative or quantitative tool to assess progress towards an outcome or goal. A statement specifying clearly and precisely a desired output, outcome, or event that is expected to occur; the “what” that is to be measured. Often used interchangeably with performance indicator; however, sometimes performance indicator is used to mean an interim step toward achieving the measure of performance. Other times, some roll several measures into what they refer to as an overall performance indicator or index.

## GETTING STARTED...

- Performance measures indicate what a program is accomplishing and whether results are being achieved.
- Performance measurement must often be coupled with evaluation data to increase understanding of why results occur and what value a program adds.
- Characteristics of good performance goals include: 1). quality over quantity, 2). importance to budget decisions, 3). public clarity, 4). feasibility, 5). Collaboration.
- In selecting key performance Indicators it is critical to limit them to those factors that are essential to the organization reaching its goal.
- Effective performance measures can let you know:
  - How well you are doing
  - If you are meeting your goals
  - If your customers are satisfied
  - If your processes are in statistical control and
  - If and where improvements are necessary

## RESOURCES

- “Performance Indicators: New Management Jargon, Political Marketing, or One Small Element in Developing Quality Services?” by Paul Bullen, Management Alternatives for Human Services  
FOR MORE INFORMATION: [www.mapl.com.au/A1A.htm](http://www.mapl.com.au/A1A.htm)
- Key Performance Indicators (KPI), by F. John Reh, About.com Management  
FOR MORE INFORMATION: <http://management.about.com/cs/generalmanagement/a/keyperfindic.htm>
- Performance Measurement Challenges and Strategies  
FOR MORE INFORMATION: [http://www.whitehouse.gov/omb/part/challenges\\_strategies.pdf](http://www.whitehouse.gov/omb/part/challenges_strategies.pdf)
- How to Establish Performance Measures  
FOR MORE INFORMATION: [www.governor.state.ut.us/Planning/PerformanceMeasurement/HowTo.doc](http://www.governor.state.ut.us/Planning/PerformanceMeasurement/HowTo.doc)
- “Intangible Measures” by Jack and Patti Phillips  
FOR MORE INFORMATION: [www.inc.com/resources/office/articles/20080301/phillips.html](http://www.inc.com/resources/office/articles/20080301/phillips.html)

# PIPELINE

## DEFINITION

A sequence of functional units or stages that perform a task in several steps, like an assembly line in a factory. Each functional unit takes inputs and produces outputs. One stage's output is the next stage's input. This arrangement allows all the stages to work in parallel thus giving greater throughput than if each input had to pass through the whole pipeline before the next input could enter. The entire pipeline works at the speed of the slowest stage.

## GETTING STARTED...

- The creation of a talent development or workforce development pipeline begins with a survey of employers to determine the needs of the future workforce. Talent and workforce development pipelines are *employer driven* and employers identify the skills, education, and numbers of workers that will be needed in the future. Pipelines should be planned 15 to 20 years in advance.
- After surveying employer needs, identify any mismatch between workforce needs and educational opportunities. Workforce training starts with kindergarten and continues through lifelong opportunities for professional development and career ladders.
- A talent development pipeline focuses on the recruitment of workers to particular companies. This focuses on how an individual company compares to competitors in things such as benefits, pay scale, and promotional opportunities. Opportunities for creating or expanding talent development pipelines include environmental scans, revisions to salary scales and compensation packages, and the creation of “in-house” training and career ladder programs.
- A workforce development pipeline focuses on the recruitment of workers to a particular occupation or industry. This focuses on how the occupation or industry compares to others in terms of salary, benefits, educational requirements, and number of job openings. Opportunities for creating or expanding workforce development pipelines include surveys to workers determine perceptions about a particular industry or occupation, expanding education opportunities, innovative recruitment strategies, and the creation of career ladder programs.

## RESOURCES

- “Creation and Implementation of a Workforce Development Pipeline Program at The University of Alabama” prepared by Billy Hix  
**FOR MORE INFORMATION:** [http://ntrs.nasa.gov/archive/nasa/casi.ntrs.nasa.gov/20030093606\\_2003101291.pdf](http://ntrs.nasa.gov/archive/nasa/casi.ntrs.nasa.gov/20030093606_2003101291.pdf)
- “Filling the Pipeline” by Clark Martin and Vicki Glenn  
**FOR MORE INFORMATION:** <http://www.tfsrc.gov/pubrds/02nov/02.htm>
- “Talent Development: The Architecture of a Talent Pipeline That Works” by Jeffrey Gandz  
**FOR MORE INFORMATION:** [www.iveybusinessjournal.com/view\\_article.asp?intArticle\\_ID=611](http://www.iveybusinessjournal.com/view_article.asp?intArticle_ID=611)

# RETURN ON INVESTMENT

## DEFINITION

A measure of investment profitability, measured as a percentage of money gained or lost on an investment relative to the capital invested. Return on investment calculations compare the net benefits of a project (including “soft” or intangible benefits such as shorter production times, better taste, and increased satisfaction) versus its total costs (including all hard and soft costs such as lost work time or inconvenience).

## GETTING STARTED...

- The first step in calculating ROI is to determine the appropriate metric for what you are measuring. For instance, if you are measuring the impact of your program, are you measuring: number of participants, number of participants who completed the program, increase in participation, increase in awareness of the program, or the increase in the literacy rate of program participants? Be sure that your metrics are meaningful to your organization. See also **performance measures** in this resource guide.
- Next, determine all of the costs of the program, including indirect costs, such as those paid to vendors. Include and monetize non-monetary costs, including intangibles such as time and effort spent. Information such as the estimated standard value of volunteers can be found online.
- Next, determine all of the benefits of the program. Monetize all intangible benefits, including social benefits, such as the reduction in use of social services or mental health benefits. Look for multiplier effects such as income taxes added to the economy by individuals who have gone back to work as a benefit of a job placement program.
- Divide the total costs by the benefits. Express the result as a ratio of inputs to outputs. If your outputs are greater than your inputs, you are getting good value for your money.

## RESOURCES

- “Beyond Charity: Recognizing Return on Investment – How the Nonprofit Community Impacts Greater Washington” by The Nonprofit Roundtable of Greater Washington  
**FOR MORE INFORMATION:** [www.nonprofitroundtable.org/media/downloads/beyondcharity.pdf](http://www.nonprofitroundtable.org/media/downloads/beyondcharity.pdf)
- “Social Return on Investment: Standard Guidelines” by Sara Olsen, Center for Responsible Business  
**FOR MORE INFORMATION:** <http://repositories.cdlib.org/cgi/viewcontent.cgi?article=1009&context=crb>
- “Social Accounting for Nonprofits: Two Models” by Betty Jane Richmond, Laurie Mook, and Jack Quarter  
**FOR MORE INFORMATION:** [www.ozvpm.com/resourcebank/documents/C095-SocialAccounting2003.pdf](http://www.ozvpm.com/resourcebank/documents/C095-SocialAccounting2003.pdf)
- “Measuring Return-on-Investment in Government: Issues and Procedures” by Todd L. Chmielewski  
**FOR MORE INFORMATION:** [www.entrepreneur.com/tradejournals/article/print/160542375.html](http://www.entrepreneur.com/tradejournals/article/print/160542375.html)
- “ROI in the Public Sector: Myths and Realities” by Jack J. Phillips  
**FOR MORE INFORMATION:** [www.accessmylibrary.com/coms2/summary\\_0286-12133355\\_ITM](http://www.accessmylibrary.com/coms2/summary_0286-12133355_ITM)

# S.M.A.R.T./S.M.A.A.R.T.

## DEFINITION

Taxonomy applied to goals or goal-setting (i.e. “goals should be S.M.A.R.T.”). Usually stands for Specific, Measurable, Attainable (or Achievable), Realistic (or Relevant), and Timely (or Time-Bound or Time-Based). When the second “A” is used, it usually stands for “Agreed-Upon”. The most often used definitions are focused on creating pragmatic goals. A second set of commonly used definitions (Stretching, Motivational, Action-Oriented, Results-Oriented, and Tangible) are focused on creating growth-oriented goals. See [www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html) for a list of all variations for the letters in the acronym.

## GETTING STARTED...

- The SMART system assists in “getting focused” on what to focus efforts toward.
- The SMART taxonomy can be applied to both goals and objectives (see both **Goals** and **Objectives** in this resource guide).
- The SMART taxonomy helps define exactly what the “future state” looks like and how it will be measured. Because there are two different SMART taxonomy systems (“practical” and “growth-oriented”), you can end up with two very different future states, depending on which system you use. Decide which future state you are aiming for beforehand and use the appropriate SMART taxonomy.
- The SMART taxonomy shows others how their work “aligns” and relates to the focus of the system.
- The SMART system is a self-check you apply to every goal, objective, and action step you set for yourself in developing your vision for success.

## RESOURCES

- “SMART Goals” from Project SMART  
FOR MORE INFORMATION: [www.projectsmart.co.uk/smart-goals.html](http://www.projectsmart.co.uk/smart-goals.html)
- “SMART Objectives: How do you make objectives SMART?” from Marketing Teacher.com  
FOR MORE INFORMATION: [www.marketingteacher.com/Lessons/lesson\\_objectives.htm](http://www.marketingteacher.com/Lessons/lesson_objectives.htm)
- “How to Write SMART Objectives and SMARTER Objectives” from RapidBI  
FOR MORE INFORMATION: [www.rapidbi.com/created/WriteSMARTObjectives.html](http://www.rapidbi.com/created/WriteSMARTObjectives.html)
- “Creating S.M.A.R.T. Goals” from Top Achievement.com  
FOR MORE INFORMATION: [www.topachievement.com/smart.html](http://www.topachievement.com/smart.html)
- “How S.M.A.R.T. Are Your Goals?” From Quality In Education  
FOR MORE INFORMATION: [http://www4.asq.org/blogs/edu/2006/04/how\\_smart\\_are\\_your\\_goals.html](http://www4.asq.org/blogs/edu/2006/04/how_smart_are_your_goals.html)



# STAKEHOLDER(S)

## DEFINITION

Any individual or organization that has a direct stake or interest in actions or decisions because they will have a role in implementing the decisions, can affect the decisions, or because they will be affected by them.

## GETTING STARTED...

- Involving stakeholders can: 1). reduce suspicion and fear, 2). increase awareness and commitment to the process, 3). allow for differing perspectives while planning the evaluation and analyzing information, and 4). increase the likelihood evaluation findings will be used.
- Stakeholders bring their own expertise to the process, and involving them in the process will give you access to a broad range of knowledge.
- The list of stakeholders will likely be specific to the planning effort at hand, but there is considerable overlap from one project to the next.
- Before beginning any project, you should complete a stakeholder analysis (also called a participation analysis) in which you identify all persons, organizations, and institutions involved in a project and speculate on their expected support or opposition to the program. All parties should be listed that are likely to be affected by the development, both positively and negatively, directly or indirectly.
- If your stakeholder analysis reveals mostly expected opposition to your project, this may indicate that the project is aligned mostly with the internal needs of your organization and not with the needs of the community.

## RESOURCES

- Stakeholder Analysis from The Guide for Managing Quality  
FOR MORE INFORMATION: <http://erc.msh.org/quality/ittools/itstkan.cfm>
- Involve Stakeholders in Planning, Problem Solving and Decision Making  
FOR MORE INFORMATION: [www.uap.vt.edu/cdrom/tools/tools2.htm](http://www.uap.vt.edu/cdrom/tools/tools2.htm)
- "Conducting Successful Interview With Project Stakeholders" by Steve Baty  
FOR MORE INFORMATION: [www.uxmatters.com/MT/archives/000221.php](http://www.uxmatters.com/MT/archives/000221.php)
- "Getting Started: Identifying Stakeholders – Participation Analysis" from Upgrading Urban Communities: A Resource Framework, The World Bank  
FOR MORE INFORMATION: <http://web.mit.edu/urbanupgrading/upgrading/issues-tools/tools/Ident-stakeholders.html>
- "Evaluation Guide: Stakeholders" from the city of Christchurch, New Zealand  
FOR MORE INFORMATION: <http://www.ccc.govt.nz/Publications/EvaluationGuide/Stakeholders.pdf>



# STRATEGIC PLAN

## DEFINITION

A document that details the organization's goals and objectives for the future as well as the road map of how to move from where it is now to where it would like to be in five to ten years. The strategic plan is a long-term, flexible plan that does not regulate activities but rather outlines the means to achieve certain results, and provides the means to alter the course of action should the desired ends change. Plans differ in structure, but commonly contain a mission, vision, values, strategic directions, objectives, key strategies, performance outcomes, operational plans and accountabilities. The strategic plan is the culmination of the strategic planning process.

## GETTING STARTED...

- A strategic plan sets a foundation so that the entire company knows what will happen and what is expected of them. Essentially, it provides a "recipe" of how to achieve a stated vision, for the chosen target market, and how a company serves customers consistently, effectively, and profitably every single time
- The written strategic plan is the final product of concrete business or strategic planning. The strategic plan should only be written after comprehensive business planning has taken place.
- The basic elements of the strategic plan are brief introduction, analysis of current environment (environmental scan), vision, mission, identifying strategic issues and strategic initiatives, strategic goals, strategic objectives, and benchmarks
- One major contributor to business failure is lack of focus on a single direction where all participants are working towards the same goals. Another contributor is losing focus on that direction and not exercising the discipline and management leadership to implement the plan as decided. A third contributor to failure is saying yes to every opportunity or changing the plan midway without determining how it will effect the current plan, priorities, resources, and the ability to deliver on the promise. (source: Clean Washington Center)

## RESOURCES

- "Strategic Planning: A Brief Discussion"  
**FOR MORE INFORMATION:** [www.sun.edu/docs/strategic\\_planning/Strategic\\_Planning\\_Presentation\\_I\\_Brief\\_Summary\\_UpdatedCommittee2\\_22\\_06.doc](http://www.sun.edu/docs/strategic_planning/Strategic_Planning_Presentation_I_Brief_Summary_UpdatedCommittee2_22_06.doc)
- "Strategic Planning in Smaller Nonprofit Organizations" by Jan W. Lyddon  
**FOR MORE INFORMATION:** <http://www.wmich.edu/nonprofit/guide7.htm>
- "What Should a Strategic Plan Include?" from Alliance for NonProfit Management  
**FOR MORE INFORMATION:** [http://www.allianceonline.org/FAQ/strategic\\_planning/what\\_should\\_strategic.faq](http://www.allianceonline.org/FAQ/strategic_planning/what_should_strategic.faq)
- Developing Your Strategic Plan by [Carter McNamara, Authenticity Consulting](#)  
**FOR MORE INFORMATION:** [http://www.managementhelp.org/fp\\_progs/sp\\_mod/str\\_plan.htm](http://www.managementhelp.org/fp_progs/sp_mod/str_plan.htm)

# STRATEGIC PLANNING

## DEFINITION

A process through which the major strategic decisions facing the organization are confronted. Decisions or issues are considered strategic if they fulfill the following criteria: 1) Define the institution's relationship to its environment; 2) Generally take the whole organization as the unit of analysis; 3) Depend on inputs from a number of functional areas; 4) Provide direction for and constraints on, administrative and operational activities throughout the institution. Strategic planning is concerned with the setting of objectives, the development of procedures for implementing the objectives, and monitoring the extent to which they are achieved. The plan consists of statements of intent in the context of the environment in which the organization will be operating and is developed by consultation with all levels of the organization.

## GETTING STARTED...

- Strategic planning is the process of answering the questions: "Where are we going?", "What should we be doing?", and "How will we do it?"
- There are many approaches to strategic planning but typically a three-step process may be used:
  - **Situation** - evaluate the current situation and how it came about.
  - **Target** - define goals and/or objectives (sometimes called ideal state)
  - **Path** - map a possible route to the goals/objectives
- Strategic planning and decision processes should end with objectives and a roadmap of ways to achieve those objectives.
- The planning process is never "done" – the planning process is a continuous cycle that is part of the management process itself.

## RESOURCES

- "Strategic Planning (in Nonprofit or For-Profit Organizations)" by Carter McNamara  
FOR MORE INFORMATION: [www.managementhelp.org/plan\\_dec/str\\_plan/str\\_plan.htm](http://www.managementhelp.org/plan_dec/str_plan/str_plan.htm)
- "Introduction to Strategic Planning" from PlanWare  
FOR MORE INFORMATION: [www.planware.org/strategicplan.htm#1](http://www.planware.org/strategicplan.htm#1)
- "Business Planning for Nonprofits: What It Is and Why It Matters" from The Bridgespan Group  
FOR MORE INFORMATION: [www.bridgespangroup.org/kno\\_articles\\_bpfor nonprofits.html](http://www.bridgespangroup.org/kno_articles_bpfor nonprofits.html)
- Strategic Planning Tools from The National School Boards Association  
FOR MORE INFORMATION: [www.nsba.org/sbot/toolkit/spt.html](http://www.nsba.org/sbot/toolkit/spt.html)
- Strategic Planning FAQ from Alliance for NonProfit Management  
FOR MORE INFORMATION: [www.allianceonline.org/FAQ/strategic\\_planning](http://www.allianceonline.org/FAQ/strategic_planning)
- "Strategic Planning Best Practices for Nonprofits" from Whatcom Council of Nonprofits  
FOR MORE INFORMATION: [www.wcnwebsite.org/practices/strategic.htm](http://www.wcnwebsite.org/practices/strategic.htm)

# STRATEGY

## DEFINITION

A systemic plan for achieving a specific goal or result. Strategies are methods or processes, in the system, required in total, or in some combination, to achieve the goals. Strategies, along with tasks, are the methods that will be used to achieve results.

## GETTING STARTED...

- Strategy is the bridge between policy or high-order goals on the one hand and tactics or concrete actions on the other.
- It is a general framework that provides guidance for actions to be taken and, at the same time, is shaped by the actions taken.
- Creating strategies is a proactive endeavor not a reactive one.
- Developing a clear strategy is critical because you're going to base your plan on your strategy.
- The sequence in the business planning process is Vision, Mission, Goals, Objectives, Strategy.
- The strategy step is the thinking through of how you will achieve those goals.
- There may be more than one strategy for each goal.

## RESOURCES

- "Strategic Planning: A Brief Discussion"  
FOR MORE INFORMATION: [www.usq.edu.au/planstats/Docs/GlossaryTerms.doc](http://www.usq.edu.au/planstats/Docs/GlossaryTerms.doc)
- "Goals and Objectives, Strategies and Tactics" by Joseph Thornley, ProPR blog  
FOR MORE INFORMATION: [www.propr.ca/index.php/2006/goals-and-objectives-strategies-and-tactics/](http://www.propr.ca/index.php/2006/goals-and-objectives-strategies-and-tactics/)
- "Basic Guidelines for Successful Planning Process" from Free Management Library  
FOR MORE INFORMATION: [www.managementhelp.org/plan\\_dec/gen\\_plan/gen\\_plan.htm#anchor1185111](http://www.managementhelp.org/plan_dec/gen_plan/gen_plan.htm#anchor1185111)
- "Strategy: Definitions and Meanings" by Fred Nickols  
FOR MORE INFORMATION: [http://home.att.net/~nickols/strategy\\_definition.htm](http://home.att.net/~nickols/strategy_definition.htm)
- "How to Create a Strategy: A Case Study" By Marian Banker  
FOR MORE INFORMATION: [www.primestrategies.com/createstrategy.htm](http://www.primestrategies.com/createstrategy.htm)

# S.W.O.T. ANALYSIS

## DEFINITION

A strategic planning tool used to evaluate the Strengths (attributes of the organization that are helpful to achieving the objective), Weaknesses (attributes of the organization that are harmful to achieving the objective), Opportunities (external conditions that are helpful to achieving the objective), and Threats (external conditions that are helpful to achieving the objective) involved in a project or venture.

## GETTING STARTED...

- Strengths and weaknesses are related to factors internal to the organization and opportunities and threats relate to factors external to the organization. Because of this, a SWOT analysis is sometimes called an internal-external, or IE, analysis.
- Be realistic about the strengths and weaknesses of your organization when conducting a SWOT analysis.
- A SWOT analysis should distinguish between where your organization is today (strengths and weaknesses), and where it could be in the future (opportunities and threats).
- A SWOT analysis should always be specific. Avoid grey areas.
- Keep your SWOT short and simple. Avoid complexity and over analysis.
- While SWOT is subjective, you should use only precise, verifiable statements (such as “10% market share” versus “significant market share”).
- The SWOT analysis headings provide a good framework for reviewing the strategy, position, and direction of a business proposition, or any other idea.
- Prioritize factors that result from your analysis and create an organizational strategy based on options generated from your SWOT matrix. Your SWOT analysis should form the basis for a strategic plan.

## RESOURCES

- Undertaking a SWOT Analysis  
FOR MORE INFORMATION: [www.britishcouncil.org/tipd-undertaking-a-swot-analysis.doc](http://www.britishcouncil.org/tipd-undertaking-a-swot-analysis.doc)
- “SWOT Analysis” from Quick MBA.com  
FOR MORE INFORMATION: [www.quickmba.com/strategy/swot/](http://www.quickmba.com/strategy/swot/)
- “SWOT Analysis: Lesson” from Marketing Teacher.com  
FOR MORE INFORMATION: [www.marketingteacher.com/Lessons/lesson\\_swot.htm](http://www.marketingteacher.com/Lessons/lesson_swot.htm)
- “How to Conduct a SWOT Analysis” by Ron Robinson  
FOR MORE INFORMATION: [www.charityvillage.com/cv/research/rstrat19.html](http://www.charityvillage.com/cv/research/rstrat19.html)
- “SWOT Analysis: Discover New Opportunities, Manage and Eliminate Threats”  
FOR MORE INFORMATION: [www.mindtools.com/pages/article/newTMC\\_05.htm](http://www.mindtools.com/pages/article/newTMC_05.htm)

# TASKS

## DEFINITION

Specific operational level activities and actions that are required to complete the measurable objectives (also referred to as “actions”). A specific action or job that will achieve a specific result. Tasks, along with strategies, are the methods that will be used to achieve results.

## GETTING STARTED...

- Tasks flow from objectives, which flow from goals. Therefore, identifying tasks is the last step in the strategic planning process, after the goals and objectives have been created. Your tasks will form a small-steps “to do” list.
- If you are having trouble identifying the tasks necessary to completing each objective, then work backwards from the finished product to the start of the project.
- Tasks are brief, plainly stated, illustrations of “to do” items; they do not need to contain step-by-step micro-details.
- Identify the date by which each task will be completed. It is important that you hold yourself to a timeline. Track progress in meeting deadlines and completing deadlines using a Gantt chart (a popular type of bar chart for illustrating a project schedule. Use Google to find examples).
- Identify who will be responsible for completing each task. Are there individuals or groups external to the organization whose permission or buy-in you need to complete any of the tasks? It is essential that this is identified and the assistance is secured prior to beginning the project.

## RESOURCES

- “Strategic Planning: Terminology to Help You” by Nova Scotia Agricultural College  
FOR MORE INFORMATION: <http://nsac.ca/admin/stratplan/terms.asp>
- “How to Use Goals to Achieve Business Success: First Steps for New Entrepreneurs” by Christy Lusk and Maria I. Marshall, Department of Agricultural Economics, Purdue University  
FOR MORE INFORMATION: [www.ces.purdue.edu/extmedia/EC/EC-726.pdf](http://www.ces.purdue.edu/extmedia/EC/EC-726.pdf)
- “Basic Guidelines for Successful Planning Process” from Free Management Library  
FOR MORE INFORMATION: [www.managementhelp.org/plan\\_dec/gen\\_plan/gen\\_plan.htm#anchor1185111](http://www.managementhelp.org/plan_dec/gen_plan/gen_plan.htm#anchor1185111)
- “Writing a Business Plan – Implementation Plan: Getting From A to B” by Daniel Richards  
FOR MORE INFORMATION: <http://entrepreneurs.about.com/od/businessplan/a/implementation.htm#>

# TECHNICAL ASSISTANCE

## DEFINITION

Practical operational or management assistance offered by an expert source that addresses specific areas for improvement. It can include fundraising assistance, budgeting and financial planning, program planning, legal advice, marketing, and other aids to management. It may take the form of instruction, skills training, working knowledge, consulting services, and/or the transfer of technical data. It does not include the transfer of funding. Assistance may be offered directly by the staff of a foundation, corporation, or partner, or it may be provided in the form of a grant to pay for the services of an outside consultant.

## GETTING STARTED...

- Technical assistance is a type of capacity building and it provides assistance that increases the organization's effectiveness on a sustainable basis. Short term training or expert consulting services that do not increase organizational capacity are not considered technical assistance.
- Before beginning technical assistance services, the recipient organization should complete a thorough and honest needs assessment with the granting organization. Additional needs not previously identified by the recipient organization in its original request might be identified by the granting organization's expertise.
- Technical assistance should produce more than improved skills or the ability of the recipient organization's staff to take improved action; it should produce measurable capacity building goals such as the ability to raise more funds, serve more people, or serve a greater geographic region.
- The technical assistance agreement should include a work plan with objectives and measurable outcomes that are agreed to by both parties. Each party should have assigned tasks to avoid confusion.
- Be sure to have a formal evaluation process following the completion of the technical assistance agreement that allows all parties a chance to review the collaboration.

## RESOURCES

- "About Technical Assistance" from The Denver Foundation  
FOR MORE INFORMATION: <http://www.denverfoundation.org/page22539.cfm>
- "Working With a Consultant or Technical Assistance Provider: A Resource List" from Foundation Center  
FOR MORE INFORMATION: <http://foundationcenter.org/getstarted/topical/consult.html>
- Charity Channel  
FOR MORE INFORMATION: <http://charitychannel.com/Home/About/tabid/4058/Default.aspx>

# VISION STATEMENT

## DEFINITION

Summarizes the ideal state of the organization. It is a statement of what the institution hopes to become based on its mission, purpose, and other mandates. It provides an inspiration and challenge to all members of the institution to reach toward an ideal of what the institution can become. It should be purposefully articulated to bridge the present and future and to serve as a critical impetus for change. The vision statement answers the question, "Where do we want to go?" The vision statement, unlike the mission statement, is internal to the company, and is not for customers or clients.

## GETTING STARTED...

- When you begin the process of strategic planning, visioning comes first.
- A vision statement is a compelling description of how "a day in the life of the customer" is improved by enjoying the benefits of your products and services.
- A vision statement can paint a picture which creates a sense of desire and builds commitment to reaching the vision.
- Vision statements are short, clear, understandable statements that identify the reason for existence and focus efforts and resources toward continuous change and improvement.
- How to write a vision statement: 1) gather the players, 2) get focused, 3) identify what is important, 4) think future, 5) write it, and 6) agree on it.

## RESOURCES

- "Strategic Planning: A Brief Discussion"  
FOR MORE INFORMATION: [www.usq.edu.au/planstats/Docs/GlossaryTerms.doc](http://www.usq.edu.au/planstats/Docs/GlossaryTerms.doc)
- "Strategic Planning: Terminology to Help You" by Nova Scotia Agricultural College  
FOR MORE INFORMATION: <http://nsac.ca/admin/stratplan/terms.asp>
- "Creating a Vision" from National School Boards Association  
FOR MORE INFORMATION [www.nsba.org/sbot/toolkit/cav.html](http://www.nsba.org/sbot/toolkit/cav.html)
- "Basics of Developing Mission, Vision and Values Statements" from Free Management Library  
FOR MORE INFORMATION [www.managementhelp.org/plan\\_dec/str\\_plan/stmnts.htm](http://www.managementhelp.org/plan_dec/str_plan/stmnts.htm)
- "Writing a Compelling Vision Statement" from Time Thoughts, Resources for Personal and Career Success  
FOR MORE INFORMATION [www.timethoughts.com/goalsetting/vision-statements.htm](http://www.timethoughts.com/goalsetting/vision-statements.htm)
- "Build a Strategic Framework: Mission Statement:, Vision, Values..." from About.com  
FOR MORE INFORMATION <http://humanresources.about.com/cs/strategicplanning1/a/strategicplan.htm>



# GLOSSARY OF TERMS

**Annual Local Area Plan** – yearly planning document for local area outlining workforce priorities and performance goals and integrating budget.

**By-Laws** – The rules that govern the internal affairs or actions of an organization. The bylaws set out the duties and powers of an organization's officers, including procedures for holding meetings and electing the board of directors and officers.

**Business Membership Organization** - promotes general business awareness and activities in an area.

**Business Trade Associations** - comprised of members representing specific industry sectors or occupational areas which have a primary focus related to the employment needs, training and growth of those industries or sectors.

**Chief Elected Official (CEO)** - the Chief Elected executive officer of a unit of local government or in a case where a local area includes more than one unit of general local government, the individuals designated by local agreement if existent.

**Community Based Organization (CBO)** - means a private non-profit organization that is representative of a community or a significant segment of a community with demonstrated expertise and effectiveness in the field of workforce development.

**Conflict of Interest** - the circumstance of a public office holder, business executive, or the like, whose personal interests might benefit from his or her official actions or influence. See "Conflict of Interest Statement" (sample), page 20.

**Critical/Emerging Industries** - emerging and critical industries are identified based on past and projected rates of growth in the number of business units and employment in a workforce investment area. An industry may be both critical and emerging or it may be critical and declining. Emerging and critical refers exclusively to numerical employment trends and does not describe the quality of jobs created, profitability condition or demand for products or services.

**Department of Workforce Development (DWD)** - department charged with administration and oversight of the majority of workforce development activities in the Commonwealth, including WIA.

**Division of Career Services (DCS)** - division of the Department of Workforce Development charged with oversight and management of the WIA Adult and Dislocated Worker Programs, Wagner Peyser, Trade Adjustment Assistance and various other workforce activities. Also provides direct delivery of WP and other services within the Career Center system.

**Economic Development Entities** - includes local planning and zoning boards, community development agencies, and other local agencies or institutions responsible for assisting and promoting local economic development.



**Employer of Record** - entity designated as providing employment, supervisory oversight, compensation and benefits for a particular individual.

**Employment Statistics System** - statewide Labor Market Information system. Section 15(e) of the Wagner Peyser Act.

**Fiscal Agent** - entity designated by the Chief Elected Official to assist in the administration of WIA Grant funds and to safeguard the integrity of the local fiscal system. Appointment of a fiscal agent does not relieve the CEO of liability for misuse of grant funds.

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**Geographic Composition/Region** - membership on the LWIB that is representative of the employers and primary industries located within the cities and towns that comprise a local workforce investment area (LWIA).

**Local Grant Recipient** - the unit of local Government and Chief Elected Official designated by the Governor as the recipient of WIA funds for an LWIA.

**Local Workforce Investment Board (LWIB)** - the local Workforce Investment Board for an area established under Section 117 of WIA.

**Open Meeting Law** - each LWIB must conduct business in conformance with 117(e) of WIA and consistent with the Massachusetts Open Meeting Law. Reference: Massachusetts Open Meeting Law <http://www.mass.gov/legis/laws/mgl/39-23a.htm>.

**Oversight** - review of the services provided to ensure quality program delivery including performance, innovation, adherence to the annual business plan and budget and compliance with statutory and regulatory requirements.

**Pathways to Success by 21 (P-21)** - P21 is a system reform and capacity building initiative at the state and local level established to improve educational and employment outcomes of Massachusetts' most at-risk youth. P21 aims to achieve its goals of facilitating the necessary transitions that will prepare youth for adulthood by creating partnerships, analyzing data, and listening to youth. P21 is managed by Commonwealth Corporation. For more information visit <http://commcorp.org/p21/index.html>.

**Revenue Plan** - a formal plan or strategy to assess, increase and deploy the financial resources of an organization through both traditional and non-traditional methods; e.g. grants applications, fund raising ventures, fee-based services.

**Unified Complaint Policy** - WIA Communication Policy 05-89 describes the Unified Workforce Investment System Complaint process, which outlines policy and procedures for complaint resolution related to the WIA program. The local WIB must develop a local policy consistent with 05-89 and must provide local complaint policies and procedures to all appropriate organizations and staff within the workforce investment area.

**Wagner Peyser Act** - Wagner-Peyser authorizes the provision for labor exchange services for job seekers and employers. Title III of the Workforce Investment Act amends the Wagner-Peyser Act.

**Workforce Investment Act Title I** - funding to provide quality employment and training services for eligible youth, adults and dislocated workers and assist employers in finding the skilled workers needed to compete and succeed in business.

**Workforce Innovation in Regional Economic Development (WIRED)** - Acronym used by the federal Department of Labor for the Workforce Innovation in Regional Economic Development initiative. The WIRED model seeks to use a regional approach to integrate economic and workforce development activities and demonstrate that talent development can drive economic transformation in regional economies across the United States.

**Youth Council** - a sub group of the LWIB focused on youth activities established under Section 117 (h) of WIA.

# **L**IST OF ACRONYMS

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CBO - Community Based Organization

CEO - Chief Elected Official

CFR - Code of Federal Regulations

DCS - Division of Career Services

DUA - Division of Unemployment Assistance

DWD - Department of Workforce Development

EO - Executive Order

FTE - Full Time Equivalent or Employee

ISA- Interagency Service Agreement

LWIB - Local Workforce Investment Board

MGL - Massachusetts General Law

MOU - Memorandum of Understanding

OSCC - One Stop Career Center

SWIB - State Workforce Investment Board

WIA - Workforce Investment Act

WIRED – Workforce Innovation in Regional Economic Development

WTF - Workforce Training Fund