



Steps Of a Smartchart (SOS)

1 STEP ONE: Program Decisions

Vision: What do you want to become?

Mission: Why do you exist?

Values: What are the core priorities in the organization's culture, what drives members' priorities and how they truly act in the organization?



2 STEP TWO: Context

Internal scan: What is the assessment of your Workforce? Are there technology needs? (organizational assets and challenges that may impact this plan, strengths, weaknesses)

Statutory authority: What RCWs – WACs have impacted or influenced your business? Are their new requirements on the horizon?

External scan: What impact of forces in the outside environment affect the outcome of your work? Are there changes in economy? Who are potential partners in external environment? Are there any trends happening? (things happening outside the organization that may impact this plan, threats and opportunities)





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2 STEP TWO: Context (cont'd)

Activity links & major partners: What key initiatives are there involving major Partners, other agencies relationship/responsibilities?

Who are your customers? Who are the direct recipients of your service?

Internal resource assessment: Have you completed surveys in your area? Are there recruitment and retention issues?

Performance assessment: How do you compare in your Performance results to similar groups? Are there emerging issues, changing needs, or performance improvement opportunities?





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STEP Three: Strategic Choices

Goals: What are you trying to do? Where do you want to be?

Decision maker(s): Who makes your goal a reality?

Objectives: What do you want to do?

Strategies: How are you going to do it?

Measurements of success: How will you know what you are doing is working?

Strategies: Who will be accountable for doing the work?





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4 **STEP Four:** Communicate and Implement

How are you going to share the strategic plan? Who will be your audience? What will be your approach?



5 **STEP Five:** Evaluate

Evaluate and review. What did we accomplish? What do we change/modify?



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