

OS Step	Focus	What it does	Leads to
Step 1A	<b>PRE-PLANNING</b>	Creates the project team and sets the process	Identify team members / timeline / budget etc
Step 1B	<b>DREAM</b> → <b>AREA</b>	Sets the overall statement of success Says where you are planning for	<ul style="list-style-type: none"> <li>• <b>Vision</b></li> <li>• <b>Scope</b></li> </ul>
Step 1B	<b>TARGETS</b> ← HEALTH → ← ATTRIBUTE INDICATOR →	Identify specific assets that make the Vision real Tells us how healthy the target is / helps prioritise Targets	<ul style="list-style-type: none"> <li>• <b>Targets</b></li> <li>• Health</li> <li>• <b>Target Health Summary</b></li> <li>• Threats</li> <li>• Goals</li> <li>• Monitoring</li> </ul>
Step 1C	<b>THREATS</b> ← PROBLEMS + CAUSES → ← SCOPE SEVERITY IRREVERSIBILITY →	Ranks Threats to identify biggest impact Ranks Threats to identify biggest Threat Prioritise Threats that stop Target health	<ul style="list-style-type: none"> <li>• Causes</li> <li>• Threats</li> <li>• <b>Threat Summary</b></li> <li>• Threat Goals</li> </ul>
Step 1D	<b>SITUATION ANALYSIS</b>	Helps look at the context of threats for identifying best points of intervention	<ul style="list-style-type: none"> <li>• <b>Situation Diagram</b></li> <li>• Strategies</li> </ul>
Step 2A	<b>GOALS</b>	Develop SMART statement of improved health (Goal) / reduced threats (Goal)	<ul style="list-style-type: none"> <li>• <b>Goals / Objectives</b></li> <li>• Strategies</li> </ul>
Step 2A	<b>STRATEGIES</b> ← IMPACT → Fix threats Strengthen Targets ← FEASIBILITY → Cost / skills	Specific sets of activities that will achieve a Goal / Objectives Criteria used to rank Strategies and identify weaknesses	<ul style="list-style-type: none"> <li>• <b>Prioritised Strategies</b></li> <li>• Result Chains</li> <li>• Actions</li> </ul>
Step 2A	<b>RESULT CHAINS</b>	Set project road map to see if Strategy will reach goals and identify monitoring needs	<ul style="list-style-type: none"> <li>• <b>Results Chains / Projects</b></li> <li>• Actions</li> <li>• Monitoring</li> </ul>
Step 2B	<b>MONITORING PLAN</b>	Defines audiences and indicators to be used to monitor progress	<ul style="list-style-type: none"> <li>• <b>Monitoring Plan</b></li> <li>• Management Plan</li> <li>• OS Step 4 – Analyze, Use, Adapt</li> </ul>
Step 2C / 3A / 3B	<b>OPERATIONAL PLANNING</b> ← CAPACITY → ← LEADERSHIP / TEAM INSTITUTIONS / FUNDS LEGAL / COMMUNITY →	Identify specific steps needed to do strategies – including people, budgets, timing Identify critical capacity needs and think about new strategies to address them	<ul style="list-style-type: none"> <li>• <b>Workplan</b></li> <li>• <b>Capacity Assessment</b></li> <li>• Goals / Strategies / Actions</li> <li>• OS 3C - Implement</li> </ul>
NA	<b>MANAGEMENT PLAN</b>	Pull all the elements together into a published management plan	<ul style="list-style-type: none"> <li>• <b>Communication products</b></li> <li>• Implementation</li> </ul>
Step 3C	<b>IMPLEMENTATION</b>	Work plan and budgets Uses the Plan Doing the work Doing monitoring	<ul style="list-style-type: none"> <li>• <b>Stuff happening</b></li> </ul>
Step 4	<b>ANALYZE, USE, ADAPT</b>	Uses data from all monitoring to check progress – Implementation, Effectiveness, Status	<ul style="list-style-type: none"> <li>• <b>Closing the circle</b></li> <li>• Strategies</li> <li>• Result chains</li> <li>• Goals</li> </ul>
Step 5C	<b>CLOSING THE CIRCLE</b>	Help build a culture of regular review, evaluation and adaptation to keep the plan alive	<ul style="list-style-type: none"> <li>• <b>Plan progress review</b></li> </ul>