

Worksheet 3.1

SWOT Checklist: Strengths and Weaknesses

Use these questions to help you do an environmental scan of your organization. The descriptions elicited by these questions can help you evaluate your internal strengths and weaknesses. Ask yourself, “What does this answer tell me about a strength or weakness?”

Leadership

- What is the general management style?
- How are decisions made?
- If we have a board, how is it involved?
- Do we have current (baseline) performance measures? If so, what role does leadership play in meeting your expected levels of performance?
- Are planning, budgeting, quality, and other management efforts integrated?

Resources

Human Resources

- What is the size and composition of our workforce (number of employees, diversity, professional, technical, clerical, exempt, classified positions)?
- What expertise do we have and what should we develop?
- How would we describe our employee development efforts?
- How is the turnover rate and morale?

Capital Resources

- What are our capital assets?
- Do we have any capital improvement needs?
- How is the location of our main office and any field offices? How does that location relate to the populations we serve?

Technology Resources

- What is the degree of automation in our organization?
- What is the quality of our various technologies?
- Do staff have adequate IT support?

Fiscal Resources

- How does our budget affect our work?
 - To what degree does our budget meet current and expected needs?
 - How efficient are our internal accounting procedures?
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| Communication | <hr/> <ul style="list-style-type: none">▪ How do we communicate our organization's accomplishments?▪ How do we share information within our organization and with stakeholders? |
| Culture/
Climate | <hr/> <ul style="list-style-type: none">▪ How does our organization respond to change, solve problems, or respond to stress?▪ What improvements have been made? |
| Structure and
Practices | <hr/> <ul style="list-style-type: none">▪ Do existing policies and practices support our service delivery?▪ What is the structure of our programs and subprograms or divisions and departments? |
| Services and
Products | <hr/> <ul style="list-style-type: none">▪ How do our services meet clients' needs?▪ Are there practices missing that could help serve clients?▪ What do the public, clients, and stakeholders think of current programs? How successfully are clients' needs being met?▪ Are there any identifiable populations that are currently unserved or underserved? <hr/> |

Worksheet 3.1, continued

SWOT Checklist: Opportunities and Threats

Use these questions to help you do an environmental scan for your organization. The descriptions elicited by these questions can help you evaluate your external opportunities and threats. Ask yourself, “What does this answer tell me about an opportunity or threat?”

Leadership

- Are there any leadership changes in government, partnering organizations, or stakeholders that would affect our organization?

Resources

Fiscal Resources

- Are there any significant political events or economic trends that could affect funding?
- Are there any issues with current or future funds (federal or nonappropriated)?
- How do our operating costs compare with other jurisdictions’ costs?
- What are our organization’s revenue and expenditure estimates for next year, the next five years? Any thoughts about future funding scenarios?
- What implications do these future forces and environmental changes (trends and issues) hold for the organization? Which is most critical?

Technology Resources

- Are there any new technologies in the marketplace that could affect the organization?

Communication

- How do our stakeholders communicate their expectations?
- How do our clients provide feedback and share expectations?
- How are we communicating information about our resources and services to clients?

Culture/Climate

- What is our public image?
- Are there any significant historical events that are shaping the current climate for our organization? How?
- What are the demographics of our client populations (age, education, geographic, special needs)?

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- Are there any trends in our area that would impact our work (population shifts, emerging demographic characteristics, economic conditions, unemployment rates, interest rates, etc.)?
 - How does our organization respond to changing economic conditions?
 - How do we anticipate the impact of future government actions on our organization and its clients (including organization-specific federal mandates; court cases, federal budget, pending legislation, general mandates—e.g., Americans With Disabilities Act, etc.)?
 - Are there any local government requirements that affect our organization?
 - What current events or policy issues have captured the attention of the public? How do they affect the organization?
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Structure and Practices

- What are our enabling state and federal statutes? Will any of these statutes be changing soon?
 - Are there any mandates that impact our daily practices or services to clients?
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Services and Products

- How do our services compare to recognized standards and to similar public or private organizations in terms of quality and cost?
 - What are the statutory mandates for those programs or activities?
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Worksheet 3.2

SWOT Grid

Factors	Strengths	Weaknesses	Opportunities	Threats
Leadership				
Resources				
Communication				

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Factors	Strengths	Weaknesses	Opportunities	Threats
Culture/ Climate				
Structure and Practices				
Services and Products				