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## Using a SWOT Analysis: Taking a Look at Your Organization [2016]

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## Facilitator's Guide

# Using a SWOT Analysis

## *Taking a Look at Your Organization*

*Nothing stops an organization faster than people who believe that the way you worked yesterday is the best way to work tomorrow.—Jon Madonna*

### Rationale:

Effective organizations must use deliberate planning strategies to identify issues and needs.

### Program Goal:

To develop the skills necessary to implement and interpret results of a SWOT analysis

### Program Objectives:

- To distinguish the elements of an SWOT analysis for organizational growth
- To successfully facilitate a SWOT analysis as an effective planning strategy
- To evaluate SWOT analysis results for application to organizational program planning
- To develop an action plan to move the SWOT analysis results toward a successful outcome

### Pre-Program Preparation/Materials:

- Read and make copies of the “Using a SWOT Analysis” fact sheet (CLD2-5).
- Review “Developing and Implementing an Action Plan for Community Organizations” fact sheet (CLD2-6) for background information for Learning Activity 4.
- Print copies of “Figure 1. SWOT Analysis Profile,” one per member.
- Print one copy of the “Interpretation and Strategy Worksheet” for recorder.
- Print copies of the “Action Plan Worksheet,” one per group.
- Gather index cards (4 colors), spray adhesive, markers, and easel paper.

### Introduction:

A SWOT analysis is a deliberate planning method used to evaluate the strengths, weaknesses, opportunities, and threats of an organization or project. The acronym “SWOT” stands for:

- **S** = Strengths: Internal attributes of the organization that are helpful to achieving the goal(s)
- **W** = Weaknesses: Internal attributes of the organization that are harmful to achieving the goal(s)
- **O** = Opportunities: External conditions that are helpful to achieving the goal(s)
- **T** = Threats: External conditions that could inhibit the achievement of the goal(s)

A SWOT analysis is a simple review process. When combined with a goal-setting activity, SWOT is a useful tool that will provide your organization with a roadmap to set and reach its goals successfully.

### Introductory Activity:

The SWOT analysis can be helpful in generating ideas and systematically evaluating a project or organization. This process can be used in making decisions, adopting strategies, and creating goals in your personal and organizational life. The following scenario will allow your group to practice determining the differences between strengths, weaknesses, opportunities, and threats.

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## Scenario: Recruiting Members for the County Teen Club

The 4-H Council has identified the need to recruit and retain more teens in the county 4-H program. The question to be answered is “What are the strengths, weaknesses, opportunities and threats facing the expanding 4-H teen involvement in Jasper County?” The president asks the council members to discuss the strengths, weaknesses, opportunities, and threats involved in recruiting and retaining more teens. Members will gather their thoughts and write their responses on the appropriate index card.

### Activity Directions:

- Identify the question to be answered or the scenario to be addressed.
- Write the question or scenario on a sheet of post-it note flip chart paper and affix to the wall or easel.
- Draw the SWOT diagram on a sheet of post-it note flip chart paper and affix to the wall or easel, then spray the diagram with adhesive.
- Distribute colored index cards. (Use a different color for strength, weakness, opportunity, and threat.)
- Label four small containers or baskets with the words “strength,” “weakness,” “opportunity,” and “threat.”
- Ask participants to answer the question and indicate responses on the appropriate cards (strength, weakness, opportunity, threat).
- Ask each member to place comment card(s) in the appropriate container/basket.
- Take turns taking comment cards out of the four containers/baskets, and use the following discussion questions as a guide.
  - » Why did you place that card in that particular basket?
  - » Did some comment cards fall into more than one category?
  - » Who needs to be at the table for the discussion? Internal participants? External participants?
  - » What are the next steps for the Council?

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## Objective 1: To distinguish the elements of an SWOT analysis for organizational growth

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### Learning Activity 1:

Draw a SWOT analysis table illustration (see Figure 1) on a flip chart pad and explain each letter of the acronym SWOT. Clearly review/explain each component of the SWOT analysis (strengths, weaknesses, opportunities, threats).

Ask the audience:

- How do you think a SWOT analysis could be undertaken within your organization?
- How would knowing each of these aspects (strengths, weaknesses, opportunities, threats) help to improve your organization?

NOTE: Focus on each of these aspects separately if you have time.

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## Objective 2: To successfully facilitate a SWOT analysis as an effective planning strategy

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### Learning Activity 2: Let’s Think About It

A SWOT analysis is basically a guided brainstorm on a specific topic or question. Through facilitation, a SWOT analysis uses open-ended questions to create more a meaningful and productive discussion.

**Helpful Facilitation Tips:** The participants should lead the discussion, and the facilitator should only speak when needed. Ask each member to post their completed color-coded index cards on the appropriate grid on the SWOT Profile diagram on the post-it note flip chart paper.

### Activity Directions:

- Give participants the following examples of what circumstances contribute to strengths, weaknesses, opportunities, and threats.
- Facilitate the discussion.
  - » Be honest and real.
  - » Be constructive while truth telling.
  - » Put your feet in someone else’s shoes.
  - » Be open-minded and think outside the box.
  - » Consider changes in society.

### Strengths:

- What do we do well?
- What advantages do we have?
- What are our resources and assets?
- What do others acknowledge as strengths of our organization?

### Weaknesses:

- What could we do better?
- What challenges or obstacles are inhibiting our growth?
- What problems must we overcome?
- What are the vulnerabilities of our organization, its programs, and its clientele?

### Opportunities:

- What do we know about but have not been able to try?
- What new frontiers we can explore?
- What resources are available that we have not yet utilized or tapped?
- Does the potential exist for community partnerships that we could build?

### Threats:

- What outside issues block the progress of our organization?
- How are we competing with other programs or organizations for resources or clientele?
- How are the demographics of our volunteers or clientele changing?
- Where are the risks facing our organization, its programs, and its clientele?

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### Objective 3: To evaluate SWOT analysis results for application to organizational program planning

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#### *Learning Activity 3: Interpreting the Meaning: So What?*

Interpreting a SWOT analysis can be done as a group or individually. This activity uses the “Interpretation and Strategy Worksheet” to identify emerging themes. An easy way to do this is to categorize the cards in each quadrant of the SWOT profile, organizing them into theme groups. Themes with the most responses are those that need the most attention and should be added to the action plan. (It is not unusual for similar responses to be identified in multiple quadrants of the SWOT profile.)

#### **Activity Directions:**

- The facilitator should identify a recorder and teams of people to categorize the emerging themes in each quadrant of the SWOT profile.
- The teams will identify the themes in each quadrant of the SWOT profile.
- The recorder will transfer the themes onto the “Interpretation and Strategies Worksheet” or easel paper.
- Allow participants to discuss strategies for strengths/opportunities and weaknesses/opportunities.
- Allow participants to discuss strategies for strengths/threats and weaknesses/threats.

- Facilitator should lead discussion of common themes.
- Recorder should make note of discussion.
- Use the following questions to facilitate discussion:
  - » What do these results tell us?
  - » What decisions need to be made?
- Specifically, you’ll want to ask the group the following questions:
  - » How can we leverage each one of our strengths?
  - » How can we improve upon each weakness?
  - » How we can capitalize on each opportunity?
  - » How can we minimize each threat?
  - » Are we ready to proceed?
  - » If yes, then what is our first step of action?
  - » If not, what needs to be done before we can proceed?

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### Objective 4: To develop an action plan to move the SWOT analysis results toward a successful outcome

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#### *Learning Activity 4: Application to Action: Creating an Action Plan*

Successful organizations build on their strengths, overcome their weaknesses, capitalize on their opportunities, and provide protection from threats. Through conducting the SWOT analysis in Activity 2 “Let’s Think about It,” council members have identified the strengths, weaknesses, opportunities, and threats of the county 4-H teen program in regard to membership recruitment and retention. Through Activity 3, members interpreted the SWOT analysis utilizing the SWOT “Interpretation and Strategy Worksheet” to further understand steps that can be taken to proceed with increasing membership and involvement.

In this activity, participants will create an action plan using the strategies identified in Learning Activity 3. An indication of a successful organization is the ability to take appropriate action when needed. The action plan is a useful tool to define goals with target completion dates and specific activities and outcomes. Participants should focus on attainable results. The action plan should be written in a “SMART” format. Writing all objectives, goals, and action steps in a SMART format will ensure that they are worded in such a way as to be easily accomplished.

## Build an Action Plan using SMART Goals

- Specific
- Measurable
- Action-Oriented
- Realistic
- Time-Sensitive

### Activity Directions:

- Review “Developing and Implementing an Action Plan for Community Organizations” fact sheet for background information.
- Facilitate the group working through the action plan worksheet.
- Utilize the “Interpretation and Strategies Hand-out” to complete the action plan.
- Discuss the actions that could be taken to accomplish the objective of increasing membership and retention in the county 4-H teen program.
- As a group, choose at least three goals to map out on the action plan worksheet. (See the example on the action plan worksheet.)
- If the group is large (more than 15 individuals), ask participants to break into groups of three to five people.
- After the action plan is completed, the facilitator may choose to lead a discussion using the following questions:
  - » Are the strengths, weaknesses, opportunities, and threats of the organization visible in the action plan?
  - » Are the strategies discussed in Activity 3 (how to leverage each strength) visible in the action plan?
  - » How could this action plan benefit the organization?
  - » How can an organization make sure the action plan is carried out?
  - » How can we utilize this process in our own club or community?

## Summary

A SWOT analysis is a useful planning tool for groups, organizations, and communities. It is important to understand a SWOT analysis, how to successfully facilitate a SWOT analysis, and how to apply the results once the analysis is finished by creating an action plan. When done successfully, this process can assist an organization in articulating and reaching its goals.

## References:

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## Figure 1. SWOT Analysis Profile


# Interpretation and Strategy Worksheet

**Instructions:** Transfer the top three emerging categories from each quadrant of the SWOT analysis and insert them in the appropriate box on this chart.

SWOT - List top three			
Strengths (S)	Weakness (W)	Opportunities (O)	Threats (T)

## Action Plan Worksheet

<b>Goal</b> <i>Be Realistic</i>	<b>Time Frame</b> <i>Be Time Sensitive</i>	<b>Activity</b> <i>Be Action-oriented</i>	<b>Outcomes</b> <i>Be Measurable</i>	<b>Results</b> <i>Be Specific</i>
<i>Each teen will invite a friend to join 4-H.</i>	<i>Invitations will be extended for the next club meeting.</i>	<i>Verbal, Facebook, text and Twitter messages will be issued.</i>	<i>At least 50% of the teens will bring a guest to the next meeting.</i>	<i>The number of teens involved in the county 4-H program will increase by 25%.</i>