



SCOT ANALYSIS

PURPOSE & METHODS

What is SCOT Analysis?

SCOT* stands for **S**trengths, **C**hallenges, **O**pportunities and **T**hreats. This tool is used to gather a broad range of information about the organization and environs. Strengths and challenges connect to the internal status of the organization (what you should be able to control). Opportunities and threats refer to what is external to the organization and may be beyond your control.



Picture from: <http://blog.firespring.com>

For example:

Strengths: What are the organization's internal strengths? What do we do well?

Challenges: What are the organizations internal challenges? Where can we improve?

Opportunities: What external opportunities exist with respect to pursuing our mission? What changes are taking place that can help us to achieve our mission? Who can we work with or rely on? What are the political, economic, social, technological, demographic trends that could support what you do?

Threats: What external threats hinder the pursuit of your mission? What changes in the environment would you have to watch out for? What are the political, economic, social, technological, demographic trends that could alter what you do?



HINT:

Sometimes strengths and opportunities might also be challenges or threats! Be sure to note when & why this is true.

Why do a SCOT Analysis?

With a small and easy time investment, an organization or program can gain deeper insight into how they are operating. This framework provides the opportunity to assess how well you're doing but also to identify some gaps or areas that need more planning or structures. In the end, this activity will support the organization to be proactive and make informed organizational decisions or planning. The SCOT also provides an important first step in an overall strategic planning process.

Who should be included in doing a SCOT Analysis?

Stakeholders! Typically, those who are involved include board, staff, and volunteers, but you may also want to include clients/guests (users of your services) or even funders. When deciding who to include, be sure to consider your purpose. You may want to get as many perspectives as possible but there may be some groups that will not speak up in the presence of other groups. Also to have a fuller picture, it's best to avoid inviting only those who all have the same opinions or perspectives! In order to get all perspectives, you may need to do this process at different times with different groups, or in one meeting with small group breakouts.

Key things to remember when doing SCOT Analysis

SCOT Analysis is a **form of brainstorming**, so it often works best in a small group where people have enough time to talk and can generate ideas from each other. Be sure to have reliable note takers!

- Provide time for participants to prepare before the meeting
 - Give them the worksheets before they arrive and ask them to jot ideas
 - Allow time at the beginning of the meeting for people to quietly gather their own thoughts & ideas
- Allow *at least* 60 minutes for the full meeting process (more time may be needed if you have many folks)
- Work in small groups – no more than 8 or 10 people
- Elicit responses from everyone
- Allow ample time (15-20 minutes) for each quadrant. Try to work on one quadrant at a time, though you may have to place some ideas in a different quadrant than where you're working (check in with the participants to identify what ideas sit best where)
- Use newsprint to record comments so everyone can see ideas as they unfold
- Remember – this is brainstorming, so write down all ideas and avoid the temptation to get into “problem-solving”
- Encourage participants not to judge or criticize each others comments (in words or body language)
- Have the attitude that there are no bad ideas
- Find out (with thumbs up or down) if statements ring true
- Encourage “piggybacking” – one idea may lead to several others

After all the ideas are generated, plan some discussion time to add more information or to clarify items that might be confusing.

Finally, have the participants identify the top 2-3 most important items each in of the strengths, challenges, opportunities, or threats. You may use dot-voting or some other consensus building activity.

If you are not able to have a meeting, or if some people can't attend, you may also do this process through written worksheets, surveys, or emails to gather the information you need.

What's Next?

The SCOT Analysis information provides a key first step in future planning for your program or organization. Board and staff will need to synthesize what they learned from the SCOT. They can then begin to identify what functions need to be addressed immediately and prioritize the next steps for developing and strengthening your operations to achieve your full mission and goals.

Sources used for this document:

Allison, Michael & Kaye, Jude. *Strategic Planning for Nonprofit Organizations (2nd edition)*. San Francisco, CA: John Wiley & Sons, 2005.

Strategic Planning in Small Nonprofit Organizations, Western Michigan University.

<http://www.ethniccommunities.org/wp-content/uploads/2011/09/StrategicPlanningWMU99.pdf>

SCOT/SWOT Analysis - Organization Strengths / Challenges (Weaknesses) / Opportunities / Threats

A SCOT Analysis will make your operations and programming more effective. It will assist you with the information you need to plan your next steps and/or develop a Leadership Sustainability Plan as well as a Strategic Plan. This analysis is best done in groups involving your key board, staff, and volunteers. This analysis involves a lot of brainstorming – so write down everything. Resist the urge to edit or problem solve.

Internal		External	
Strengths What's strong about your agency, for example: Age of organization, Tenure of staff, Ease of purchase/donation, Financial stability, Location, Reputation	Challenges (Weaknesses) What presents challenges, such as: Cash flow, Short-staffed, Space limitations, Board inefficiency Note: Strengths can also be weaknesses—a long-tenured staff may have a lot of experience, but they may be too set in their ways, or have stale ideas.	Opportunities Opportunities are the thing your organization has no control over, but could potentially take advantage of. For example: Grants, partnerships, change in demographics, etc. Try to think outside of the box on these. Your ability to see opportunities coming could be significant.	Threats What external threats exist that could harm your nonprofit? Some examples: the economic downturn, Elimination of funding, policy changes in SNAP, Rising vendor costs, Lack of donations, etc.