

Bite Size Pieces
Conducting a Preliminary Situational Assessment
Module Three

1. Recommended Pre-requisite(s) – Strategic Planning
BSP Modules one and two

2. Learning Objective

Conducting a Preliminary Situational Assessment

This session allows board members to develop a preliminary list of the strengths, weaknesses, opportunities and threats the clinic faces in fulfilling its mission.

Note – Relax! You don't need to be a trained facilitator to run this session – everything you need is provided with this module.

3. Content Covered

Considering the clinic's Strengths, Weaknesses,
Opportunities and Threats

Note – If food is being served, you might consider having the board start the module while still eating.

4. Learning Outline

Before the session, post the list of 'Terms & Definitions' from the last session (Module #2) in a place where it will be visible for the next couple of meetings [e.g. a wall, a portable flip chart]. Also post on the wall four 'signs' or flip chart pages: one labelled STRENGTHS, one labelled WEAKNESSES, one labelled OPPORTUNITIES and one labelled THREATS.

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Tell the group you will now be focussing on what is known as a SWOT analysis – determining the strengths, weaknesses, opportunities and threats that the clinic faces in fulfilling its mission.

Hand out ‘sticky notes’ to all board members (a different colour per topic) and ask them to write strengths weaknesses, opportunities and threats they believe the clinic faces in fulfilling its mission. Make sure there is only one per sticky note. (5 minutes)

Ask board member to post the ‘sticky notes’ under the appropriate SWOT sign. Remove any duplications and discuss and agree on the ones remaining. (5 minutes)

Appoint a Strategic Planning Committee, or assign it to an existing committee, to take the plan to the next step.

Explain that the next step is to come up with a list of Strategic Imperatives and confirm that this committee will take all of this input, and come back with a list of draft Strategic Imperatives. Discuss (5 minutes)

Tip – You may need to refer back to the definitions of the SWOT components in Module Two. Some members may be tempted to label an internal weakness as a threat or to view the plan to correct a weakness as an opportunity!

5. Equipment and Materials Needed

Strategic Planning Process and Definitions (from Module Two)

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SWOT sign's or flip chart pages
'Sticky notes' – four different colours
Pens

6. Timeframe

15 minutes

7. Facilitator Notes

Note – Use this section to make your own notes about the session. Be sure to share anything of an evaluative nature when the session is over.

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8. Results/Evaluation

Please make enough copies of the Evaluation form (page 6-7) and have each participant complete and hand in to you at the end of the session

Note – Evaluation is an important part of our training success! Please ask all participants to complete an evaluation form.

9. Next Steps

Consider adding another Bite Size Piece module to your next agenda.

Ask a volunteer to lead the next session

Encourage all board members to visit:
www.onboardlegalclinics.org to sign up for automatic updates on board learning and development

Tip – why not download the ‘Bite Size Pieces Board Training Grip’ which your board can use to track what training has been covered and who has been a session leader?

Bite Size Pieces

Evaluation

Name of Clinic:

Module Name: Conducting a Preliminary Situational
Assessment

Date:

Module Number: Three

About this Module

(To be completed by all participants and the session leader)

This material contributed to a better understanding of the
topic

Disagree Neutral Agree Strongly Agree

The Content was relevant

Disagree Neutral Agree Strongly Agree

The content was organized and easy to follow

Disagree Neutral Agree Strongly Agree

The time spent on this module was worth it

Disagree Neutral Agree Strongly Agree

For an introductory session, the level of the content material
was:

Too Advanced Just Right Too Basic

This module could be improved by:

Bite Size Pieces

Evaluation

About Bite Size Pieces Training

(To be completed by all participants and the session leader)

This is an easy and cost-effective way to learn

Disagree Neutral Agree Strongly Agree

I like making learning a board agenda topic

Disagree Neutral Agree Strongly Agree

Everyone on the board should take a turn at leading a session

Disagree Neutral Agree Strongly Agree

About the Bite Size Pieces Facilitation

(To be completed by the session leader)

I found the facilitation notes and material easy to follow

Disagree Neutral Agree Strongly Agree

I enjoyed my role as session leader

Disagree Neutral Agree Strongly Agree

Session Leader. Please provide a copy of this evaluation form to each participant and ask that it be completed and returned to you at the end of the session.

Tabulate all results on a separate sheet and fax to the BSWG at: 1-866-674-6714. You can also send an email of the results to: contact@onboardlegalclinics.org