

ORGANISATIONAL MAPPING TOOLKIT

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SWOT Analysis



SWOT stands for strengths, weaknesses, opportunities and threats. It's useful for mapping out your organisation as it currently works.

You can complete a SWOT analysis independently, but it's a good idea to bring in other people too.

Running an effective SWOT analysis as a group

- Get your post-it notes and flipchart paper, or set up an online whiteboard (through Zoom, Google Slides, Jamboard, Miro) if you're working online.
- Gather a group of people, and ask "who is here and for what reason?" and "who isn't here?" SWOT analysis works best with people who have a good familiarity with your organization, but they don't need to be internal. Think about the relationships and power dynamics in the room.
- State upfront that this isn't a performance review, and nor is it a planning exercise. It's to try and draw a picture of the organization and look at connections. Individual 'strengths' and 'weaknesses' aren't up for discussion. Make a group agreement that centres both honesty and care - an 'oops/ouch' approach might help.
- When conversations drift to blame, fatalism or trying to find perfect solutions, gently bring people back on track and remind them of the parameters of the exercise.
- You can run several sessions with different groups of people, or run this exercise regularly at intervals, and explore what changes between different times and different groups.
- After you've completed the exercise, take a break, and then come back to draw connections between things that pop up on different parts of the grid.
- Have prompts that go deeper than the headings. Look for processes and behaviours. If a strength is 'clients trust our services', unpack why and what work goes into that. See below for examples of questions which can deepen your thinking around SWOT analysis.

Examples of questions to deepen your SWOT analysis

What makes you proud?
What skills and expertise are present in the organization?
What are the best things about the organization's internal culture?
What do your clients & service users benefit from the most?
What change does your organisation make in the world?

What resources do you lack?
What do your clients & service users want that you can't or don't provide?
What skills and expertise are not present or are not being utilised within the organisation?
Is there anything you'd like to change about internal culture?
Who isn't at this meeting and why?

SWOT ANALYSIS QUESTIONS

Who are your strongest supporters and allies?
When you think about the change your organisation wants to make, who do you want to work with to create that?
Who else needs the skills and expertise present in your organisation?
Where do you have the most influence?
Who would be able to resource the work you're doing?

What are your limiting factors? Where are the bottlenecks or choke points where your capacity is tested?
Look at your strengths and weaknesses. Would people outside the organisation identify the same ones?
What impact do the above issues have on staff and volunteer wellbeing?

Building on your SWOT analysis

Once you've laid out your strengths, weaknesses, opportunities and threats you can explore the links between them, and how they might interact with each other. See below for a template you can use for a second part of this exercise.

	Strengths	Weaknesses
Opportunities	Options for using strengths to take advantage of opportunities	Options for overcoming weaknesses that prevent pursuing opportunities
Threats	Options for using strengths to reduce likelihood and impact of threats	Options for addressing weaknesses that will make threats a reality

(from NCVO <https://knowhow.ncvo.org.uk/organisation/strategy/options/swoting/swoting-a-pest>)

Adapted PESTLE Analysis

PESTLE stands for Political, Economic, Social, Technological, Legal and Environmental. These are external factors which will impact your organisation and the people involved in it.

PESTLE analysis can be quite overwhelming, and it was also originally created for for-profit businesses, so sometimes the prompts you'll find online aren't particularly helpful for charities. To help you break down external impacts, see the adapted version with key charity stakeholders added along the side. Filling this out will help you break down not just external factors, but how they impact differently on different groups of people who make up or interact with your organisation.

Feel free to add or remove stakeholder groups, or add or remove areas of external change, as it feels relevant to you.

What are the impacts on...	Political	Economic	Social	Technological	Legal	Environmental
...the organisation as a whole?						
...staff members?						
...volunteers?						
...service users?						
...your funders and potential funders?						

An example with some boxes filled out:

What are the impacts on...	Political	Economic	Social	Technological	Legal	Environmental
...the organisation as a whole?	Eg. your org has strong support within the local council			Eg. WFH has meant your digital infrastructure has improved	Eg. safeguarding duties and GDPR	Eg. need to create action plans for what happens if adverse weather conditions affect delivery of services
...staff members?		Eg. cost of living rising = worse staff wellbeing, potential problems in WFH due to energy costs	Eg. working in certain areas such as racial justice, trans rights, being perceived as 'pro vax' etc can bring a risk of harassment			Eg coming back to the office requires more space and a rebuilding of trust
...volunteers?		eg. cost of living rising = people want to pick up paid work instead of volunteering		Eg. people can now volunteer remotely		
...service users?	Eg. due to Brexit migrant service users are a lot more vulnerable		Eg. reduction in stigma around an issue (eg postnatal depression) has resulted in more people accessing your services			
...your funders and potential funders?	eg. increase in funding to Black-led organisations in 2020, which has not been sustained	eg. funders want you to provide more cost effective services				Eg. funders may want to see evidence of sustainability commitments (and you may want the same from them)

Vision, Mission & Values

From [NCVO](#):

Vision and mission

A vision statement sets out the ideal state your charity or non profit is seeking.

A mission statement sets out the role your organisation will play to achieve the vision.

Values

Your board provides leadership in the values it embodies and the culture it fosters. These will in turn be reflected in the way that staff and volunteers work.

You already have a vision, mission and values, though you may not have put them on paper yet. Take some time to consider them, and look at them in relation to both the SWOT and PESTLE analyses.

In particular, consider your values: these are the most grounded part of the mission statement, and they should guide you when you're making decisions.

Exercise: write down your values on flip chart paper or an online whiteboard, and brainstorm with your team the way that you put them into practice. This may well give you some clear ideas about what to put into a SWOT analysis - you'll get a better sense of what you're doing well, and also which values feel less clear or less practiced.

Job Role Analysis

Job role analysis involves examining the tasks a person in a particular role carries out. This is often done as a HR exercise to support performance, review job descriptions or flesh out roles prior to hiring. Differentiate between doing role analysis for HR reasons and for strategic reasons. Strategy is not a performance review!

The point of doing role analysis in a strategic context is to understand **what tasks** are being carried out currently, **what kinds of impacts** they have in the context of your organisations strengths, weaknesses, opportunities and threats, and **whether those impacts are in line with your aims and values**.

Gathering information about the tasks you carry out

- Read back through your calendar/diary
- Read back old to-do lists
- Keep notes on your activities for a set period (a week or two)

Break down tasks as small as you can and note even the small ones: checking emails, firing off quick messages, writing notes, scrolling Twitter. Note the breakdown of who you're meeting and which connections you're fostering. Again, don't worry about 'productivity' here. You're plenty productive - this is not an exercise in squeezing out more work, just in understanding the work you actually carry out. Once you have this information set out in front of you, you can think about what it means in relation to your vision, mission and values.

Exercise: Examine the list of tasks you carry out on a day to day basis and ask:

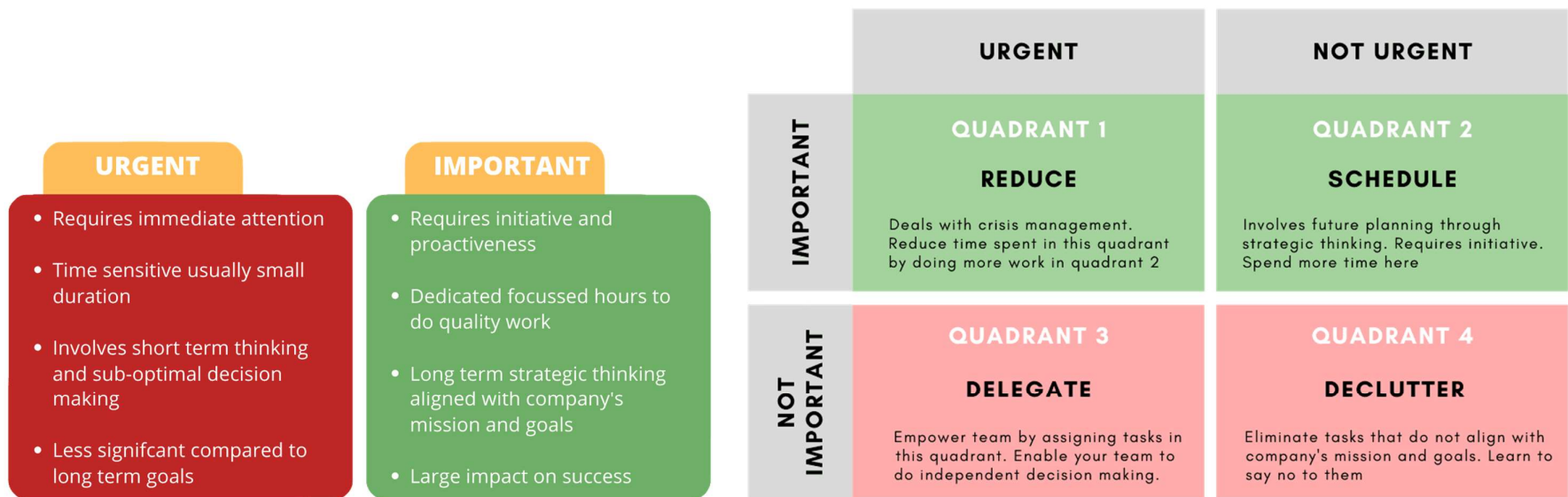
- Where am I practicing organisational values? Which decisions do they inform?
- How do these tasks relate to furthering the mission and vision of the organisation?

Urgent vs Important

Exploring the tasks associated with your role can also help you think about strategic time management. When moving towards strategic working, understanding the difference between urgent and important is really key.

Taking into account the definitions of urgent and important presented here, examine your tasks and place them into the framework given below. This process can really help with managing capacity and avoiding overcommitments and saying yes to everything. It also helps manage the chaos and sense of constant crisis which is very common in service provision charities, and which can lead to serious burnout.

These graphics are from <https://www.techtello.com/eisenhower-productivity-matrix/>



'Safe to Try' Decisions

If you're struggling with a way forward, think about asking not 'what are all the ways this could go wrong?' but 'is this safe to try?' It's for **small specific problems** and it helps because:

- Inaction can be more harmful than a decision that is not perfect
- You can always course correct based on real-life feedback - which can surprise you and teach you more than imagining everything that could go wrong or right
- It builds a habit of making small quick decisions - letting you and your organization respond quicker and be more agile
- It removes worrying about what you don't know—you focus on what you know, by building on all of the work you've done to develop a good picture of your organisation

Judging whether something is 'safe to try' means asking two questions:

1. **Will this move the organization backwards?**
2. **Does it have the potential to cause harm that can't quickly be mitigated?**

Take your time with the questions and refer back to the mapping you've already done to inform your answers. If the answer to both these questions is 'no', it's 'safe to try'. That's not a guarantee it will work, it just means that you can give it a go and learn more.

For more thoughts on decision-making, check out <https://www.fearlessculture.design/blog-posts/why-the-best-decisions-are-never-perfect>