



# Environmental scan and SWOT worksheet

This worksheet will help your organization begin the environmental scan process, a key first step in strategic planning. Use it to explore trends, challenges and emerging shifts that could impact your mission, services, or community.

## Part one: Environmental scan overview

An environmental scan is the process of systematically exploring your organization's internal and external environment to better understand the nature and pace of change, identify opportunities and risks and prepare for future developments. This step helps build strategic awareness and lays the groundwork for more informed decision-making. It helps your organization to:

- Understand trends and shifts affecting your work.
- Identify opportunities, risks and uncertainties.
- Align your plan with real-world developments.
- Increase your strategic readiness and adaptability.

### Use the prompts below to guide your discussion or research – Key questions to explore:

What are some of the current or emerging trends in our sector or field?

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What changes are happening in our community or among the people we serve?

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What policies, funding changes or external events may affect us?

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How are technologies or service models evolving in our space?

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What assumptions have we made that we may need to revisit?

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Where might we be vulnerable or missing opportunities?

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## Part two: SWOT analysis

A SWOT analysis helps you examine your organization's internal strengths and weaknesses as well as external opportunities and threats. It's useful for summarizing your scan findings and building a shared understanding of your strategic position.

### SWOT worksheet

#### Strengths (internal)

What are we good at? What resources or capabilities give us an advantage?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_

#### Weaknesses (internal)

What are our internal limitations or gaps?

1. \_\_\_\_\_

2. \_\_\_\_\_

3. \_\_\_\_\_

4. \_\_\_\_\_



### Opportunities (external)

What external trends or changes could we take advantage of?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### Threats (external)

What external risks or obstacles could challenge us?

1. \_\_\_\_\_
2. \_\_\_\_\_
3. \_\_\_\_\_
4. \_\_\_\_\_

### Reflection

What have you discovered in your scan? Note patterns, surprises or questions that came up:

1. \_\_\_\_\_
2. \_\_\_\_\_

How might these trends or issues affect your organization in the future?

1. \_\_\_\_\_
2. \_\_\_\_\_

What implications could this have for your strategic plan?

1. \_\_\_\_\_
2. \_\_\_\_\_