

(please read these and complete the SWOT before starting to complete the survey form)

### **First of all - book the meeting**

We encourage you to book this Workshop into one of your Board meetings **as soon as possible**, before the end of December 2014. The deadline for sending us your completed survey form is **31 December 2014**.

### **Make sure the right people can attend**

You will find it helpful to have as many of your Chapter officials as possible at the meeting; they should include your Treasurer, Programme and PR/Fundraising and Training Coordinators.

### **Give yourselves time**

We think that completing the survey will take you about 30 - 40 minutes. The SWOT exercise we ask you to do first will take a little longer; we suggest it will take around an hour to 90 minutes. Overall, we think it will take you about 2 hours to do everything.

### **Get your resources together**

To complete the survey, you will need a laptop or computer that has Adobe version 11 installed. Using the correct version of Adobe is very important as you will need it to complete the questionnaire – *with any earlier version of Adobe, it may look like it's working, but what you type won't be saved.* If you don't have the latest version, you can download it for free from [Adobe](#) before your meeting.

Print out a copy of these Help Notes for each person attending your meeting.

You may also wish to print out a copy of the survey for each person attending the meeting.

If you are a larger group, you may wish to use a projector to show the video that explains how to complete the survey form.

### **Getting started**

Completing this survey will help us as we look to develop a clear understanding of what growth means for CISV and a clear, stated and shared vision and mission. We also hope that it will help you plan for your Chapter.

**Before** you start answering the questions in the survey, we would like you use this SWOT matrix. It's a little different from most SWOT matrices, as we've included a number of options for you to choose from. We think this will take you about an hour to 90 minutes to do.

You may have already done a SWOT as a part of your Chapter planning; so you may have ready answers!

If you are not familiar with doing a SWOT analysis, it helps you to identify:

**Strengths:** ways of working in your Chapter that are helpful to your growth/development (things you do really well)

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**Weaknesses:** ways of working in your Chapter that are unhelpful to your growth/development (things you don't do so well)

**Opportunities:** external conditions that are helpful to your growth/development (things happening or planned to happen outside of your Chapter that you could take advantage of)

**Threats:** external conditions that are harmful to your growth/development (things happening outside of your Chapter that cause you problems or might cause you problems in the future)

**Step1:** Decide on your Strengths, Weaknesses, Opportunities and Threats. In the Strengths and Weaknesses, we have given you a number of options to choose from, which you can use or you may have some we haven't thought of. We have not given you any options for your Opportunities and Threats as we think that these will be very individual to your Chapter.

Be realistic in your answers.

<p><b>S</b></p> <p>We offer good training          We are open to new people          We have clear role profiles for volunteers          We regularly recruit new volunteers          We keep our volunteers engaged          We have a strategic plan in place which provides direction and focus          We have a fundraising plan to help us generate income          We have a strong and active Board          We use the Regional Delivery Teams in our region for information and support          We send our volunteers to RTFs for training          We can afford to send our volunteers to trainings          We match the skills of our Board to the needs of the Chapter          We engage with past volunteers and participants          We have a volunteer succession plan in place          We do some activities purely to help raise our profile (profile raising is the sole reason for the activity)          We have good links with like-minded-organizations          Other</p>	<p><b>W</b></p> <p>We do not offer training          We only recruit from families of participants          We do not have clear role profiles for volunteers          We do not regularly recruit new volunteers          We struggle to keep our volunteers engaged          We do not have a strategic plan in place to help keep us focused          We do not have a fundraising plan to help us generate income          We do not have a strong and active Board          We do not make use of the Regional Delivery Teams in our region for information and support          We do not send our volunteers to RTFs for training          We struggle to pay to send our volunteers to trainings          We don't match the skills of our Board to the needs of the Chapter          We do not engage with past participants and volunteers          We do not have a volunteer succession plan in place          We do not do any profile raising activities          We do not have good links with like-minded-organizations          Other</p>
<p><b>O</b></p>	<p><b>T</b></p>

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**Step 2:** Decide on your 3 greatest Strengths, 3 greatest Weaknesses, 3 greatest Opportunities and 3 greatest Threats. If you have not seen some or all of your greatest Strengths and greatest Weaknesses in the options we gave, please make a note of what they are.

We would also like you to think about the following:

1. What do you think is your most important advantage (where you have a **strength** and an **opportunity** to develop or use it)
2. What do you think is your biggest risk now? (where you have a **weakness** and a related **threat**)
3. What do you think is your biggest risk in the future?

Keep a note of all your answers and watch the video on how to complete the survey form. Your answers will help you to complete Section 2 of the survey form. You do not need to do any preparation for Section 3 of the survey form.

**Step 3:** Complete the survey form, save it and send it to us by email. All the instructions are on the form. Please note that in Section 2, Question 14 should read:

‘If you fundraise, please tell us the activity or programme that has most attracted external funders?’

**Step 4:** For the future - use your SWOT answers to plan ahead.

Use your results to think about:

- How can we Use each Strength?
- How can we Stop each Weakness?
- How can we Exploit each Opportunity?
- How can we Defend against each Threat?

Note that a weak opportunity will not balance against a strong threat!

There are a lot of very good and easy to use guides for how to use the results of a SWOT analysis and include them in your strategic planning that are available online.

If you would like help with using the results of your SWOT, please contact your Chapter Development Regional Coordinators for advice. You can find their contact details on [www.cisv.org](http://www.cisv.org)

We are also looking for a number of NAs to work with to develop the results of their SWOT further; let us know in the survey form if you would be interested in being part of this.

**Thank you again for your time and contribution.**

**Strategic Planning Group**