

# STRATEGIC OPPORTUNITY ASSESSMENT

Decision-making guide for civil society  
and community organizations



This document is intended to help guide decision-making for local community-based and civil society partners and/or policymakers to determine when an opportunity is strategic and likely to be effective. An opportunity may be for funding, partnership, and collaboration or other forms of organizational engagement.

**Collaboration, funding, and engagement are often assumed to be beneficial.**

This is not always the case. These opportunities can be effective when they are intentional. Goals, roles, and purpose must be clearly shared and understood so that all organizations and staff can make informed, strategic decisions.

**This document intends to support community-based and civil society partners and policymakers to think about opportunities for routine immunization activities.** However, the principles and questions can be applied to other health areas. This is intended as an outline and guide. It is not meant to dictate or decide how to move forward. It is meant to help with an organizational discussion.

**To use this document, go through the flow chart and criteria, either individually or in a group setting.** Discuss the strengths, weaknesses, opportunities, and threats (SWOT) to the organization considering the opportunity. If helpful, you can use the corresponding template to write down the opportunity, outcome, and alignment, and to note yes, no, not sure, or not applicable (does not apply) to criteria.

## What is the opportunity?

An opportunity might be related to funding, grants/proposals, new partnerships, or new collaborative opportunities.

The opportunity is...

## What is the goal / outcome / impact of the opportunity?

The goal or outcome is what the “opportunity” hopes to achieve. There might be a health impact or service delivery goal. There could be policy or advocacy goals.

What does the grant / funding hope to achieve? What is the goal of the partnership, funding, or proposal?

## Does the goal / outcome/ impact align with the organizational purpose / mission / core function?

Consider if the goal or outcome will help the organization with its mandate or purpose. For example, if your organization is focused on immunization coverage, then a climate action project might not align with the mission. If the mission is child health, a project related to heart disease may not be the right fit.

**Note:** the goal / outcome / impact may not align 100% with the organizational mission / purpose / core function, but there should be some activities that further the organization's mission or goals. There should be something to be gained or achieved for the organization.

How does the goal / outcome / impact align with the organization's purpose / mission / core function?

YES

## Complete the SWOT analysis

See next pages

NO

Likely not strategic to engage or collaborate.



It is not necessary to continue with the SWOT analysis at this time. However, consider how to stay informed about the activity or partners involved. By staying informed, there may be opportunities to consider in the future.

# SWOT

**Review the SWOT criteria outlined below.** As you go through the list, read the prompting question for each section and determine if the answer for each criteria is “yes or no” or perhaps something that is unsure or not applicable. For example, using the first criteria under “opportunity / potential,” you would consider if “This opportunity provides organizational growth.” Then select your response box as appropriate. Once the list is complete, total the number of yes/no/not sure/not applicable responses.

## STRENGTHS

	Yes	No	Not sure	Not applicable
<b>Opportunity / potential</b> <i>What do we stand to gain?</i>				
<b><i>This opportunity will provide...</i></b>				
Organizational growth				
Partnership potential				
Geographic growth				
Funding (in the next 1-3 years)				
Funding (in the next 3-5 years)				
More recognition for the organization				
Demonstrable skills /expertise				
Achieve or improve organizational goals				
Additional / other criteria:				
Total				

	Yes	No	Not sure	Not applicable
<b>Strength / asset</b> <i>What do we bring to the opportunity?</i> <i>What are our existing resources?</i>				
<b><i>We are strong in....</i></b>				
Technical skills / expertise				
Community relationships				
Funding (in the next 1-3 years)				
Funding (in the next 3-5 years)				
Government relationships				
Reputation among partners				
Strong, established reputation with partners and/or government				
Staff and member availability				
Can deliver work in expected timeframe				
Additional / other criteria:				
Total				

★	Opportunity/Strength Total	Yes	No	Not sure	Not applicable

# SWOT

**Review the SWOT criteria outlined below.** As you go through the list, read the prompting question for each section and determine if the answer for each criteria is “yes or no” or perhaps something that is unsure or not applicable. For example, using the first criteria under “weakness / gap,” you would consider if “We do not have technical skills or expertise.” Then select your response box as appropriate. If your organization lacks technical skills or expertise you would select “yes,” identifying the weakness or gap. Once the list is complete, total the number of yes/no/not sure/not applicable responses.

## WEAKNESSES

	Yes	No	Not sure	Not applicable
<b>Weakness / gap</b> <i>What do we lack?</i> <i>Where do we stand to gain assets?</i>				
<b>We do not have....</b>				
Technical skills / expertise				
Community relationships				
Funding (in the next 1-3 years)				
Funding (in the next 3-5 years)				
No established or known reputation with partners and/or governments				
Government relationships				
Staff and member availability / bandwidth				
Additional / other criteria:				
Total				

	Yes	No	Not sure	Not applicable
<b>Threat</b> <i>How does this put the organization at risk or threaten our work?</i>				
<b>This opportunity is risky because...</b>				
Minimal or no funding				
Difficult partners				
No / minimal staff or member bandwidth				
Risks relationship / trust with the community				
Pace of work / timelines are not realistic				
Public recognition could be damaging				
Additional / other criteria:				
Total				



**Weakness/Threat Total**

Yes

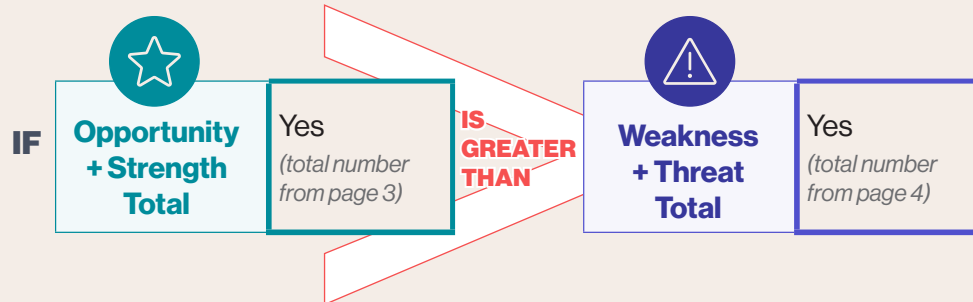
No

Not sure

Not applicable

# SWOT

**Review your SWOT analysis.** Using your totals from from the previous pages, consider your reponse to the current opportunity.



**THEN** Consider **moving forward with opportunity**.

- ☒ It will be strategic to position the organization in opportunities in which there are strengths or assets.
- ☒ Consider activities that use existing strengths and help achieve potential.
- ☒ **Questions to consider: How will you mitigate existing risks? What, if anything, will need to shift or change to take on this new work? Do we have a plan to begin implementation of this work?**



**THEN** Likely **not a strategic opportunity at this time**.

- ☒ Consider following the grant / collaboration / activities and tracking if opportunities arise in the future.
- ☒ It will be important to identify opportunities that align with organizational opportunities and strengths going forward.
- ☒ **Questions to consider: How can you stay informed about the activity or partners involved? How can you can identify other opportunities to pursue in the meantime?**

**The example below** outlines the potential way in which a civil society organization or community-based organization could use the brief to make a strategic decision about partnering on a large multi-partner grant. This is illustrative, meant to depict a relevant situation in the middle-income country context, but the details are fictional.

**Local community-based organization “Health Partners” has been invited by a large international non-governmental organization to join a multi-partner project to improve measles-rubella (MR) vaccine coverage.**

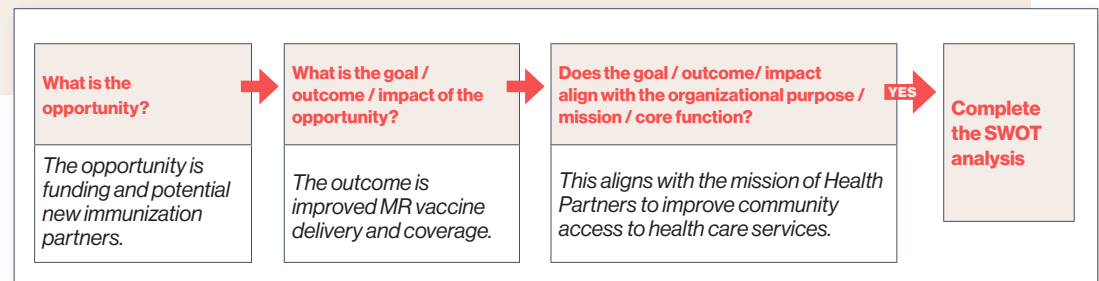
- ▶ The opportunity is funded by an international donor and there is financial support for Health Partners to implement activities in the community.
- ▶ They are well known in the local community and have many good connections within the local health sector.
- ▶ They have not engaged in any immunization projects but are working to strengthen their visibility and relationship with the Expanded Programme on Immunization and Ministry of Health.
- ▶ Along with conducting community outreach, Health Partners is involved in a few other local projects and has maintained steady staffing for several years.
- ▶ As donor funding is becoming more limited, Health Partners leadership team is worried about how to sustain their staffing and community activities.
- ▶ When the offer to join the multi-partner project is received, the leadership staff at Health Partners gather for a meeting and use the strategic decision-making framework to discuss the opportunity.

**Health Partners leadership team starts by identifying the opportunity.**

They identify the funding and potential new immunization partners as the opportunity being discussed.

They then go on to define the outcome as improved MR vaccine delivery and coverage, which aligns with the mission of Health Partners to improve community access to health care services.

With this information agreed, the leadership of Health Partners decides this is an opportunity they ought to consider, so they move forward with the SWOT analysis.



The leadership team reviews the opportunity potential, noting that they can gain organizational growth, new partners, funding, visibility, and highlight their connections with the local community. Along with these opportunities, Health Partners' assets include their existing community relationships, their known reputation among a small group of partners, and their steady staffing model. Health Partners believes they can deliver on the activities in the timeframe needed.

After reviewing the opportunities and strengths, Health Partners leadership team considers the weakness of the multi-partner project. The major weakness they identify is their lack of technical skills in immunization. They have years of work in the health sector, but not immunization specifically. Because of this, their reputation among government officials and other partners in the immunization space is not very robust. The leadership team also reviews the threats and concludes that the only risk of this partnership is that their reputation could be damaged if the visibility of the project is negative.

With the review of the opportunities and strengths compared alongside the weaknesses and threats, the Health Partners leadership team realizes they offer more than enough to be valuable partners on this project, and they stand to gain quite a bit. While there are risks, as with any project, Health Partners leadership team knows they can work to mitigate these risks while using this project as an opportunity to improve upon their weaknesses, particularly to strengthen their immunization technical expertise.

## SWOT

Review the SWOT criteria outlined below. As you go through the list, read the prompting question for each section and determine if the answer for each criteria is "yes or no" or perhaps something that is unsure or not applicable. For example, using the first criteria under "opportunity potential," you would consider if "This opportunity provides organizational growth." Then select your response box as appropriate. Once the list is complete, total the number of yes/no/not sure/not relevant responses.

	Yes	No	Not sure	Not relevant
<b>STRENGTHS</b>				
<b>Opportunity / potential</b> What do we stand to gain?				
<b>This opportunity will provide...</b>				
Organizational growth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Partnership potential	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Geographic growth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding (in the next 1-3 years)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding (in the next 3-5 years)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
More recognition for the organization	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demonstrable skills / expertise	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Achieve or improve organizational goals	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional / other criteria:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total	5			
<b>Strength / asset</b> What do we bring to this opportunity? What are our existing resources?				
<b>We are strong in...</b>				
Technical skills / expertise	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community relationships	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding (in the next 1-3 years)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding (in the next 3-5 years)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government relationships	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Reputation among partners	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Strong, established reputation with partners and/or government	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff and member availability	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Can deliver work in expected timeframe	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional / other criteria:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total	4			
<b>Opportunity/Strength Total</b> Yes <b>9</b> No Not sure Not relevant				

## SWOT

Review the SWOT criteria outlined below. As you go through the list, read the prompting question for each section and determine if the answer for each criteria is "yes or no" or perhaps something that is unsure or not applicable. For example, using the first criteria under "weakness / gap," you would consider if "This weakness provides organizational growth." Then select your response box as appropriate. Once the list is complete, total the number of yes/no/not sure/not relevant responses.

	Yes	No	Not sure	Not relevant
<b>WEAKNESSES</b>				
<b>Weakness / gap</b> Where do we stand to gain assets?				
<b>We do not have...</b>				
Technical skills / expertise	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Community relationships	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding (in the next 1-3 years)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Funding (in the next 3-5 years)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No established or known reputation with partners and/or governments	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Government relationships	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Staff and member availability / bandwidth	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional / other criteria:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total	2			
<b>Threat</b> How does this put the organization at risk or threaten our work?				
<b>This opportunity is risky because...</b>				
Minimal or no funding	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Difficult partners	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No / minimal staff or member bandwidth	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Risks relationship / trust with the community	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Place of work / timelines are not realistic	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Public recognition could be damaging	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Additional / other criteria:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Total	1			
<b>Weakness/Threat Total</b> Yes <b>3</b> No Not sure Not relevant				



☒ Consider moving forward with opportunity.