

SPU Situation Assessment Exercise

This is a variation on a traditional “SWOC” intended to identify (and then incorporate) both near- term and longer-term thinking in the next strategic plan.

Pre-meeting: It will be very helpful if Panel members can take a quick look at two other items included in the Meeting packet in advance --both items re-cap materials presented on October 2: (1) a summarized comparison of the 2013-2016 SWOCs, and (2) a one-page matrix transcribing the current concerns and future outlook priorities from the Division Heads (materials shared in the PPT from October 2).

After refreshing ourselves with the SPU self-assessment about what has and hasn’t changed from the last 2 strategic plan SWOCs (see shorter version included in advance meeting materials), the exercise will work as follows:

- 3 questions, 3 small groups (Panel divided into 2 groups, plus 1 group of SPU staff leadership—alternately, we can create 3 groups combining Panel and staff)
- For each question, we will allot 25 minutes:
 - 10 minutes for groups to discuss, identify responses.
 - 12-15 minutes for the report out (4-5 min. per group)
 - 4 minutes to identify common themes

The questions are:

1. ***In the next 6 years***, what external or internal trends or situations can you identify that you think are reasonably plausible and could impact SPU (positively or negatively) and its ability to provide quality services?
2. ***In the next 10-50 years***, what external or internal trends or situations can you identify that you think are reasonably plausible and could impact SPU (positively or negatively) over time and its ability to provide quality services?
3. *Thinking about SPU today, what does it do well, and where is it challenged/there is room for improvement?*

The results of the exercise can be used to both identify strategic action items to respond to current conditions, as well as consider what the Utility may want to begin working on in the near term to address longer-term risks/opportunities.