

# SWOT and Criteria Exercises

## How Did We Get Here?

- In Recon, you started with a broad array of possible approaches and had a correspondingly broad array of criteria by which to evaluate those approaches.
- As you developed a shared understanding of the approaches, you dropped some of the criteria because they didn't help discriminate—for instance maybe all the approaches were going to get the same rating under a certain criterion, or another criterion that showed differences started to feel less important over time.
- At the last meeting, you seemed to coalesce around an approach that emphasizes the capture and use of winter flows to create and maintain a large underground storage reservoir and also contributes to restoring regional aquifers.
- At this meeting, you will be evaluating four Portfolios. They all have the same basic winter flow capture-flavored Plan A (with an important difference or two). The main distinction between the Portfolios are the different ways winter flows are used, whether additional supplies are developed early in the process, what the fallback or Plan B strategy is and what is the trigger that would result in moving from Plan A to Plan B.
- Because of the sifting, narrowing and sorting you have done, the range of criteria you need is smaller now, but the precision is actually greater.
  - As mentioned above, some of the old criteria drop out. That's progress! You have developed a base of agreement about stuff that doesn't need to be hashed out anymore.
  - You can look more precisely at specific details, such as the issue of stranded assets, which might have gotten mushed into 'cost' in the old Recon-level approach.
  - You may need to look more precisely at the differences between Plan A, the trigger, and Plan B so as you move forward with your work you can mix and match (more on that below)—in other words two different criteria for something like cost: 'cost for plan A' and 'cost for plan B.'

## What is Thursday's Exercise?

Thursday's task is designed to help Committee members explore the risks and uncertainties associated with the performance of the four portfolios and identify key criteria that are important in considering these risks and uncertainties. The work starts with a SWOT (strength, weakness, opportunities, threats) analysis and includes as a parallel task, discussion of criteria being used to by the group as it considers the portfolio. This whole exercise should take about 2.5 hours. A

representative of the group will report out on the SWOT results at the Friday meeting.

**SWOT:** In working groups, each group will conduct a detailed SWOT analysis for an assigned Portfolio and a more general SWOT analysis for the other portfolios.

**Criteria:** Working in your groups, you'll peruse your SWOT and as you do so, it is very likely that the criteria will jump out at you from your SWOT Worksheet. Take these criteria and put them on Worksheet #2. When you are done, you should have a list of criteria specific to your Portfolio. Excellent.

## SWOT ANALYSIS



Now gut-check the list of criteria and make sure it has what matters. If something is missing, you may want to make sure the new criterion is reflected in your SWOT.

About 90 minutes into the SWOT analysis, Carie will briefly ask group members to suggest criteria. Though you'll stay in your groups, these criteria will be discussed, briefly, by the whole group. This discussion is just to make sure everyone is on the same page about defining criteria, not to decide whether a sample criterion is a worthy criterion or not.

Extra time? It is very helpful to think about the measures you would use for a criterion. Even if you can't take an actual measure, it is useful to know whether you would (conceivably) measure something in inches or pounds, in decibels or satisfaction surveys. If you have time, suggest some measures!

### What Happens with this Exercise?

The main point of this exercise is to support vital, effective, salient conversation not only on Thursday and Friday but also in July.

Another way the July conversation will be supported is by the results of your next online MCDS exercise. To run the exercise, we must have the following items agreed to before the end of the June meeting:

- **Portfolios**
- **Criteria**
- **Definitions** (Portfolios and Criteria)

- **Rating Scales**
- Protocols for How to Engage Online
- Schedule for the Kaffeeklatsches

Thursday's exercise helps us get to the bolded items. (The ratings scales only come from this exercise if you have time to fill out the extra credit column on the worksheet—that's why they are half-bolded!)

After the Thursday exercise, Carie will take your criteria worksheet and make a composite list of criteria. She'll make some judgments, organizing and lumping. Rosemary will take Carie's organized list and provide draft definitions and ratings scales. She'll also describe assumptions about the rating of separate parts of the Portfolios.\* On Friday you'll get a handout with the raw list of criteria, the draft criteria as organized/lumped by Carie and the draft definitions, rating scales and assumptions prepared by Rosemary.

In the Friday discussion, you'll put your improvements on that list and approve it for use on the website assessment tool. Then:

- Week of June 22<sup>nd</sup>, website and Kaffeeklatsches
- July Packet: results of MCDS evaluation in PowerPoint form
- July meeting: build from there (could be mix-and-match, could be adding in other ideas not included in the June website Portfolios, could be something else depending on how things go.)

### **But I Want to Change the Portfolios!**

These four Portfolios are not 'the' answers! The Portfolios don't have to be *right*, they need to be *distinct*.

After you get the MCDS information back, it may be that you start to play mix-and-match, for instance taking Plan A from Portfolio 2, the trigger from Portfolio 3 and a plan B that blends a bunch of different ideas. Or, it may be that you realize there are some ideas that need to be brought back in and given the same kind of attention that the June Portfolios have received. Either way, you'll need and want to tinker in July.

June is meant to support that tinkering. Having distinct (and interestingly imperfect) ideas to explore in June makes for more perfection in July and onwards.

Also, if you try to improve too soon, there's a risk of making wise (or unwise) decisions that are hard to explain to other people later.

It would make sense for the design of this June-to-July progression to stick to the Portfolios as designed. But if they must change, the groundrule is: only if it makes your Portfolio *more* different from the others!

Criteria Worksheet

Portfolio:

| Criterion | Notes | Measure How?<br>(if you have time) | Applies To? |          |        |          |
|-----------|-------|------------------------------------|-------------|----------|--------|----------|
|           |       |                                    | Plan A      | Trig-ger | Plan B | Over all |
|           |       |                                    |             |          |        |          |
|           |       |                                    |             |          |        |          |
|           |       |                                    |             |          |        |          |
|           |       |                                    |             |          |        |          |
|           |       |                                    |             |          |        |          |
|           |       |                                    |             |          |        |          |

That's enough criteria! (But if you insist, use the back of the page.)