# Self-Analysis Worksheet

**For Use with the** [**Criteria for Performance Excellence**](https://www.nist.gov/baldrige/publications/baldrige-excellence-framework/businessnonprofit)**®,** [**Education Criteria for Performance Excellence**](https://www.nist.gov/baldrige/publications/baldrige-excellence-framework/education)**®,**[**Health Care Criteria for Performance Excellence**](https://www.nist.gov/baldrige/publications/baldrige-excellence-framework/health-care)**®, or** [**Baldrige Excellence Builder**](https://www.nist.gov/baldrige/products-services/baldrige-excellence-builder)**®**

Insights gained from external examiners or reviewers are always helpful, but you know your organization. You are in an excellent position to identify your organization’s key strengths and key opportunities for improvement (OFIs).

* Complete your responses, or have a team create responses, to the questions in the seven Baldrige Criteria categories found in the [Baldrige Excellence Framework](https://www.nist.gov/baldrige/publications/baldrige-excellence-framework)® booklet or the [Baldrige Excellence Builder](https://www.nist.gov/baldrige/products-services/baldrige-excellence-builder)®.
* Identify one or two strengths and one or two OFIs for each Criteria category, and record them on this worksheet.
* For strengths and OFIs of high importance, use the worksheet to create and communicate an action plan for improvement.

|  |  | |  | **For High-Importance Areas** |  | |  | |
| --- | --- | --- | --- | --- | --- | --- | --- | --- |
| **Criteria category** | **Importance** High, medium, low | | Stretch (strength) or improvement (OFI) goal | What action is planned? | By when? | | Who is responsible? | |
| **1 Leadership** |  | |  |  |  | |  | |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| **2 Strategy** |  | |  |  | |  | |  |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| **3 Customers** |  | |  |  | |  | |  |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| **4 Measurement, Analysis, and** | | **Knowledge** | **Management** |  |  | |  | |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| **5 Workforce** |  | |  |  |  | |  | |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| **6 Operations** |  | |  |  |  | |  | |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| **7 Results** |  | |  |  |  | |  | |
| *Strength* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |
| *OFI* |  | |  |  |  | |  | |
| 1. |  | |  |  |  | |  | |
| 2. |  | |  |  |  | |  | |