



A DIFFERENT APPROACH TO STRATEGIC PLANNING: SOAR-BUILDING STRENGTHS-BASED STRATEGY

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WORKSHOP OBJECTIVES

- Participants will learn how to frame strategic planning in a manner that actively engages stakeholders within their own organization
- Participants will learn a different approach in helping an organization to design a planning process that provides a more meaningful – and clearer - strategic direction



ICEBREAKER

What is going well for you or your organization?

And

Why do you care about the future of your
organization?



SOAR: A NEW APPROACH TO STRATEGIC PLANNING

- SOAR- Strengths, Opportunities, Aspirations and Results
 - A more strength-based spin than SWOT (Strengths, Weaknesses, Opportunities and Threats)
- A strategic planning framework that...
 - Focuses on strengths
 - Seeks to understand the whole system by including the voices of the relevant stakeholders.
- Helps organizations focus on:
 - What they are doing well,
 - What skills can be improved and
 - What is most compelling to stakeholders.
- Pushes organizations to develop strategic plans that are more dynamic, creative and optimistic.



WHAT IS S.O.A.R.?

Strengths

What can we build on?



Opportunities

What are our stakeholders asking for?



Aspirations

What do we care deeply about?



Results

How do we know we are succeeding?

DEFINING SOAR

- A strategic planning framework with an approach that focuses on strengths and seeks to understand the whole system by including the voices of the relevant stakeholders.
- Utilizes a “5-I approach” in developing a strategic plan
 - Initiate, Inquire, Imagine, Innovate & Inspire to Implement
- Integrates Appreciative Inquiry (AI) in building strength based strategy



SWOT vs. SOAR

SWOT Analysis	SOAR Approach
Analysis Oriented	Action Oriented
Weakness and Threat focus	Strengths & Opportunities focus
Competition focus- <i>Just be better</i>	Possibility focus- <i>Be the best!</i>
Incremental improvement	Innovation breakthroughs
Top down	Engagement at all levels
Focus on analysis → Planning	Focus on Planning → Implementation
Energy depleting- <i>There are so many weakness and threats!</i>	Energy creating- <i>We are good and can become great!</i>
Attention to Gaps	Attention to Results

SWOT	SOAR
<p>Strengths</p> <ul style="list-style-type: none"> Organizational Resources and capabilities Basis for developing differentiating advantage 	<p>Strengths</p> <ul style="list-style-type: none"> What are we doing really well? What do our strengths tell us about our skills?
<p>Weaknesses</p> <ul style="list-style-type: none"> Absence of strength; lack of resource or capability 	<p>Opportunities</p> <ul style="list-style-type: none"> How do we collectively understand outside threats? How can we reframe to see the opportunity? What is the enterprise asking us to do? How can we best partner with others?
<p>Opportunities</p> <ul style="list-style-type: none"> External circumstances that support profit and growth Unfulfilled customer needs, new technology, favorable legislation 	
<p>Threats</p> <ul style="list-style-type: none"> External circumstances that hinders profit and growth 	
	<p>Aspirations</p> <ul style="list-style-type: none"> Considering Strengths & Opportunities, who should we become? How can we make a difference for our organization and its stakeholders?
	<p>Results</p> <p>How do we tangibly translate our Strengths, Opportunities and Aspirations?</p>

WHAT IS APPRECIATIVE INQUIRY (AI)?

An evaluation process “that inquires into, identifies, and further develops the best of what is in an organization in order to create a better future” (Coghlan, Preskill, Catsambas, 2003).

- An approach to organizational analysis and learning.
- Intended for discovering, understanding and fostering innovations in social organizational arrangements and processes.
- Based on the belief that human systems are made and imagined by those who live and work within them.
- Seeks out the “best of what is” to help ignite the collective imagination of “what might be”.

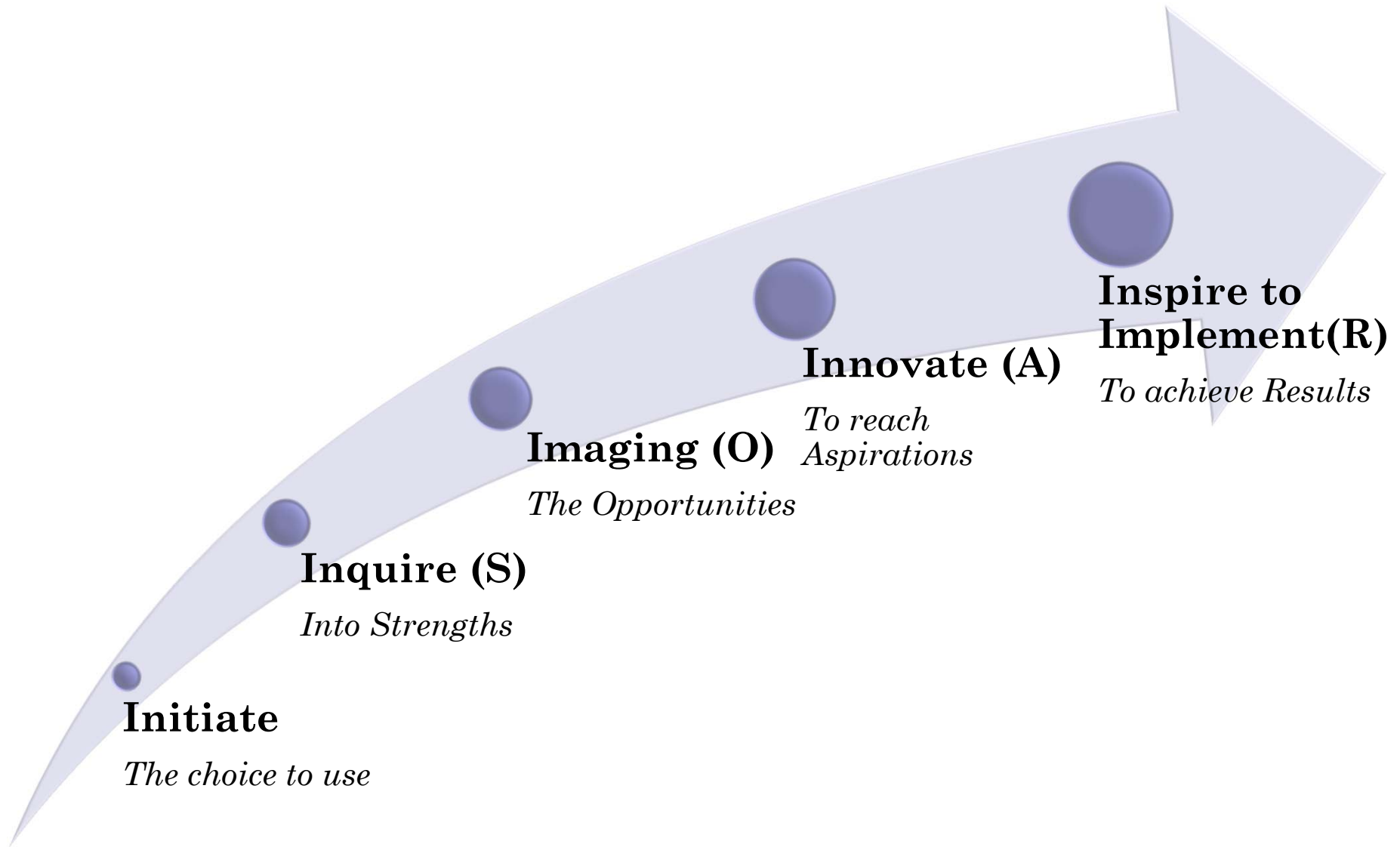


AI AND ORGANIZATIONAL DEVELOPMENT

- “Appreciative organizing is based on the assumption that the *continuous creation and sharing of meaning is crucial* to the *full engagement* of individuals and to the capacities of the organization *for fluid and effective transformation.*” (Anderson et al., 2008)
- Thus, approaching program evaluation and strategic planning from an *appreciative perspective* can help to *increase stakeholder investment and utilization.*



THE 5-I APPROACH



STRENGTHS: *WHAT CAN WE BUILD ON?*

- What are we most proud of as an organization?
How does that reflect our greatest strength?
- What makes us unique? What can we be best at
in our world?
- What is our proudest achievement in the last
year or two?
- How do we use our strengths to get results?
- How do our strengths fit with the realities of the
marketplace?
- What do we do or provide that is world class for
out customers, our industry, and other potential
stakeholders?



DEVELOPING STRENGTHS

In small groups....

Each person will:

- Describe examples or stories that shows the organization at its best and
- When s/he felt proud to be part of it

Each group will report back to the large group the major themes that came up in their discussions



OPPORTUNITIES: *WHAT ARE OR STAKEHOLDERS ASKING FOR?*

- How do we make sense of opportunities provided by the external forces and trends?
- What are the top 3 opportunities on which we should focus our efforts?
- How can we best meet the needs of our stakeholders, including customers, employees, shareholders, and community?
- How can we reframe challenges to be seen as existing opportunities?
- What new skills do we need to move forward?



ASPIRATIONS: *WHAT DO WE CARE DEEPLY ABOUT?*

- When we explore our values and aspirations, “what are we deeply passionate about?”
- Reflecting on Strengths and Opportunities conversations, who are we, who should we become and where do we go in the future?
- What is our most compelling aspirations?
- What strategic initiatives (e.g. projects, programs, processes) would support our aspirations?



DEVELOPING ASPIRATIONS

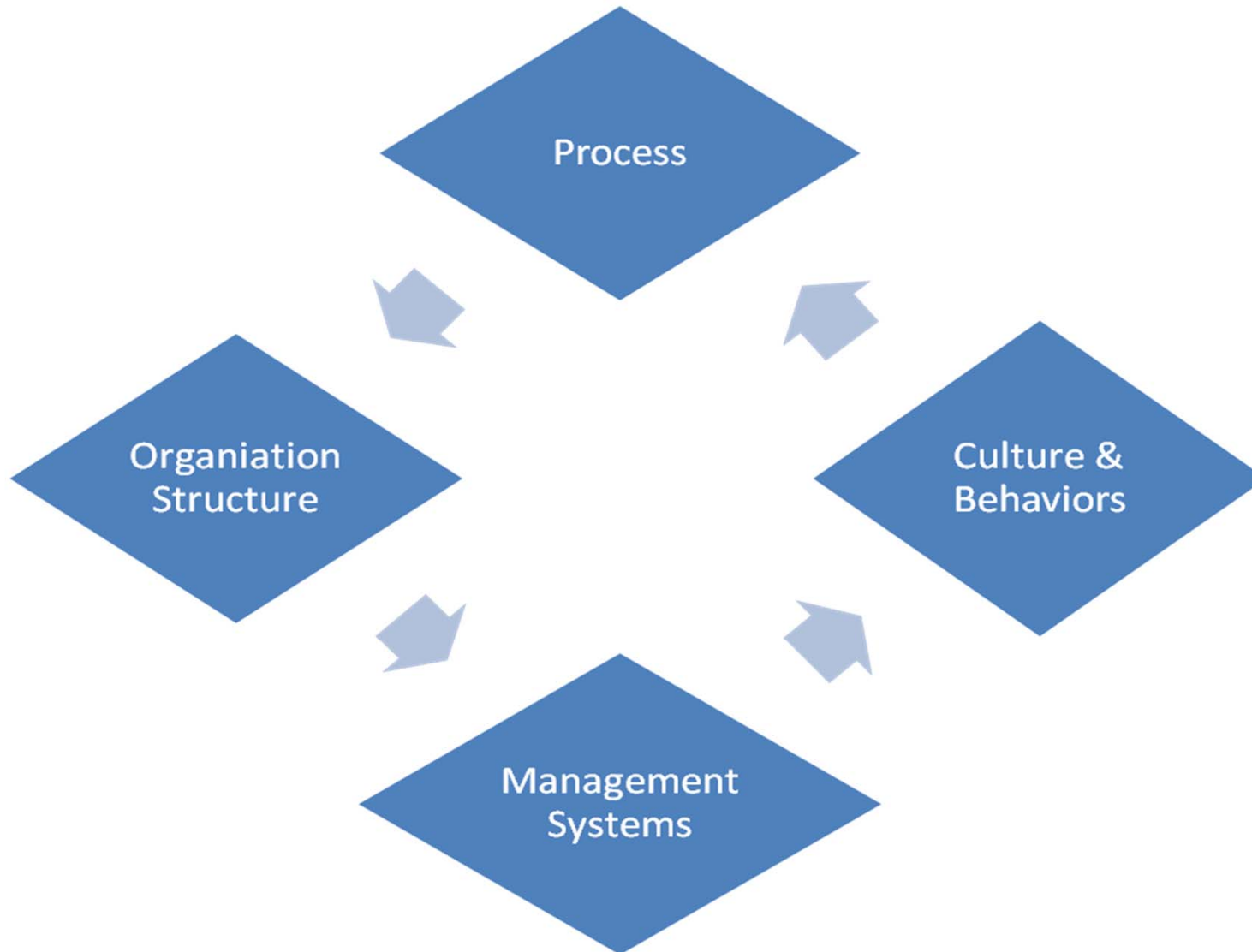
In small groups, discuss

- What are we deeply passionate about?
- What is our most compelling aspirations?

Each group will report back to the large group the major themes that came up in their discussions



INNOVATE: WALKING THE DIAMOND



RESULTS: *HOW DO WE KNOW WE ARE SUCCEEDING?*

- Considering our Strengths, Opportunities, and Aspirations, what meaningful measures would indicate that we are on track to achieving our goals?
- What are 3 to 5 indicators that would create a scorecard that addresses a triple bottom line of profit, people and planet?
- What resources are needed to implement vital projects?
- What are the best rewards to support those who achieve our goals?



DEVELOPING RESULTS

In small groups, discuss

- How do you define success as a professional?
- How do you know you are succeeding?

Each group will report back to the large group the major themes that came up in their discussions



THE SOAR PROCESS

- Can be done quickly or over an extended period of time
 - Depends on purpose/goal
 - Ex: defining a committee's goals for the year vs. agency wide 4 year strategic plan
- Should include “teams” or break out groups to address each set of questions
 - This is best opportunity to involve various stakeholders
- Requires reframing of strategic planning process and goal setting.
 - Plan for resistance to change



EXAMPLE: HEARTSHARE'S PROCESS

- A 3 day process, spread out over several months and various supplementary meetings
 - Started with upper management
 - Then, broke out into divisions to do “homework” (see handouts)
 - Included all levels of staff and clients/consumers
- Top 3 *Aspirations* became our goals
- *Results* became our strategies





QUESTIONS?

RESOURCES:

- Stavos, J., M & Hinrichs, G. (2009). The Thin Book of SOAR: Building strengths-bases strategy.
- AI Commons- <http://appreciativeinquiry.case.edu/>
- Coghlan, A. T., Preskill, H., & Catsambas, T. T. (2003). An overview of appreciative inquiry in evaluation. In, H. Preskill & A. Coghlan (Eds.), Appreciative inquiry and evaluation. New Directions for Program Evaluation, 100, 5-22. San Francisco: Jossey-Bass.
- Harlene Anderson, David Cooperrider, et. al. The Appreciative Organization, The Taos Institute, 2008.





THANK YOU!

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