



# **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.?

**S**trengths

*What can we build on?*



**O**pportunities

*What are our stakeholders asking for?*



**A**spirations

*What do we care deeply about?*



**R**esults

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

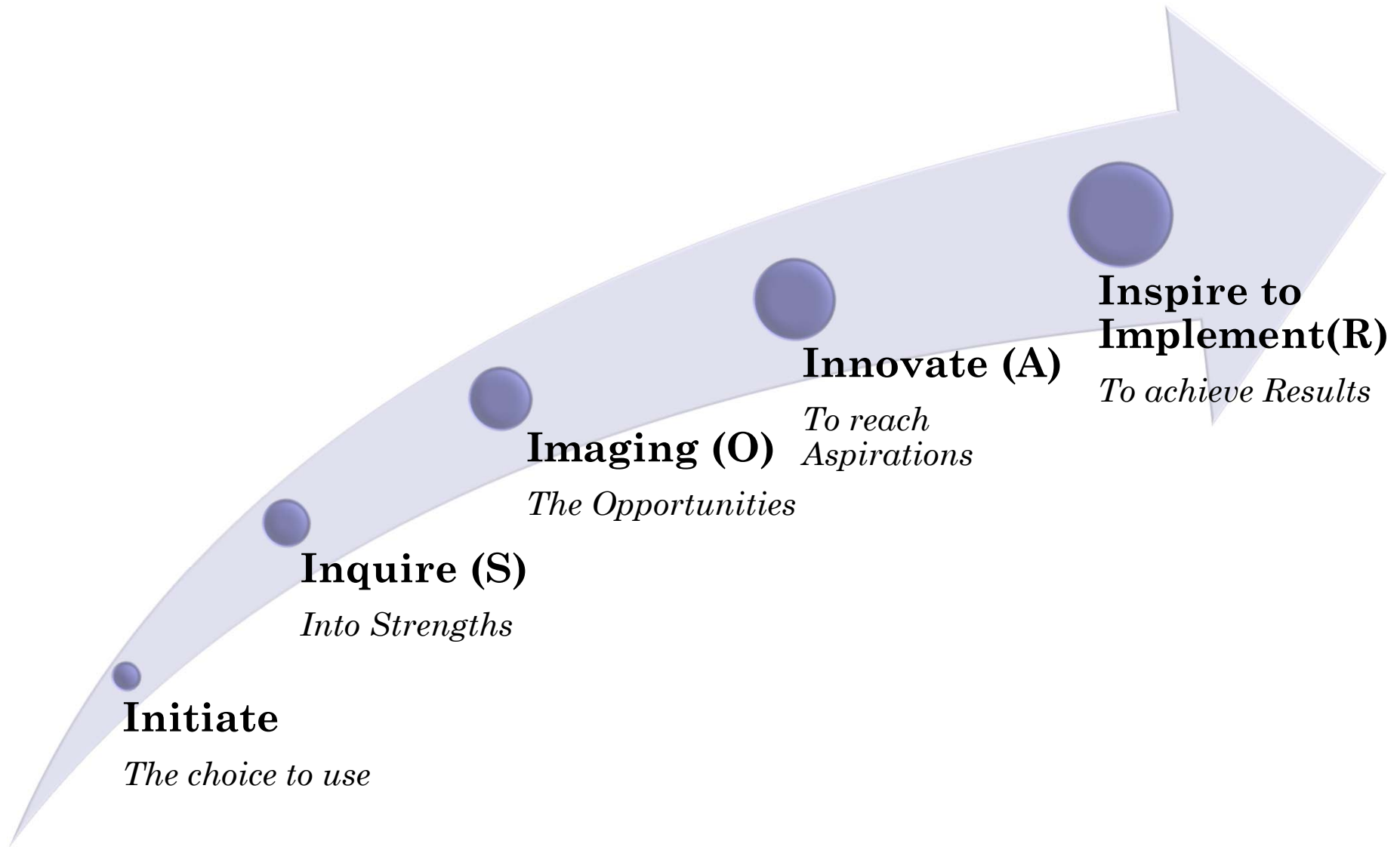


## AI AND ORGANIZATIONAL DEVELOPMENT

- “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 ....

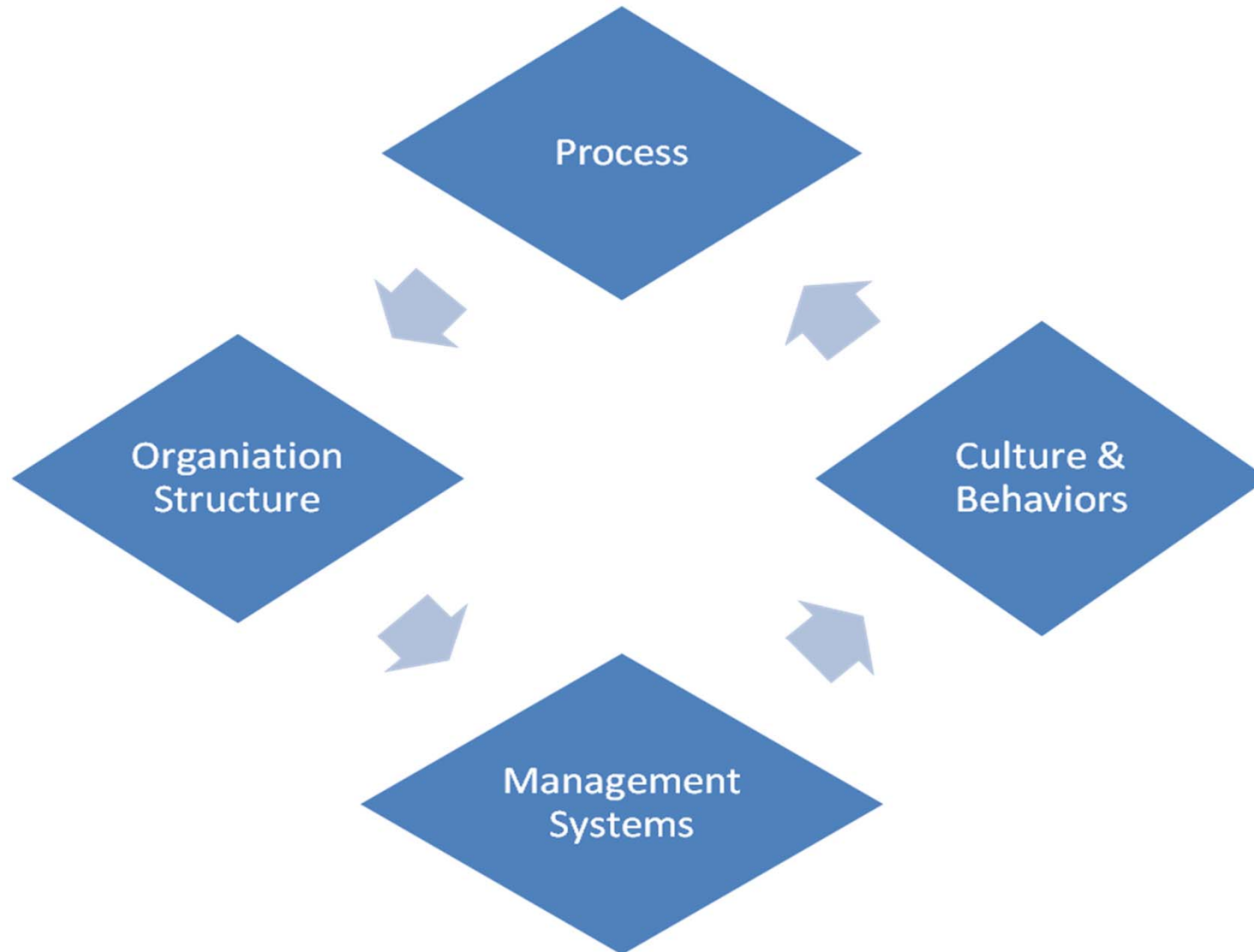
- What are we deeply passionate about?
- What is our most compelling aspirations?

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# 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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