Appreciative Inquiry and SOAR (Strengths, Opportunities, Aspirations, Results): A Model for Strategic Planning

What is Appreciative Inquiry?

“At its heart, AI is about the search for the best in people, their organizations, and the strengths-filled, opportunity-rich world around them. AI is not so much a shift in the methods and models of organizational change, but AI is a fundamental shift in the overall perspective taken throughout the entire change process to ‘see’ the wholeness of the human system and to “inquire” into that system’s strengths, possibilities, and successes. ”


AI Source

A strengths, opportunities, aspirations, results (SOAR) analysis is a strategic planning approach that focuses an institution or organization on its current strengths and vision of the future for developing its strategic goals. With SOAR, the focus is on the institution/organization and enhancing what is currently done well, rather than concentrating on perceived threats and/or weaknesses. Grounded in principles of Appreciative Inquiry it is a positive and affirming process.

Relevant Definitions

S = Strengths: What we are doing really well, including our assets, capabilities, and greatest accomplishments.

O= Opportunities: External circumstances that could improve our effectiveness/efficiency/impact in meeting the needs (NOTE: Threats or weakness reframed into possibilities)

A= Aspirations: What the organization can be; what the organization desires to be known for.

R= Results: The tangible, measurable items that will indicate when the goals and aspirations have been achieved.
Benefits

- Engages representatives from every level of an institution/organization to have shared conversations and input on strategy and strategic planning. Resistance to change is minimized and vested parties are more likely to commit to goals and objectives that they helped create.
- Is flexible and scalable, so planning and decision making can be adjusted to fit an organization’s needs and culture. Building on the organization’s strengths produces greater results than spending time trying to correct weaknesses.

Steps

- **Step 1.** Identify stakeholders who will participate, and determine the format and frequency of meetings.
- **Step 2.** Create a guide for gathering information about strengths, perspectives, and aspirations of invested parties and key stakeholders.
- **Step 3.** Engage invested parties and stakeholders to discover the conditions that created the organization’s greatest successes. Ask powerful, positive questions to generate images of possibility and potential.
- **Step 4.** Threats, weaknesses, or problems should not be ignored, but rather should be reframed. Discussion should focus on “what we want” rather than “what we don’t want.”
- **Step 5.** Summarize the positive core aspects, i.e. unique strengths, resources, capabilities, and assets.
- **Step 6.** Identify aspirations and desired results that create a compelling vision of the future using the best of the past and that also inspire and challenge the status quo.
- **Step 7.** Decide which opportunities have the most potential.
- **Step 8.** Write goal statements for each of these strategic opportunities and identify measures that will help track the organization’s success.
- **Step 9.** Plan actions and implement the plan for each identified goal.

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