

INSTRUCTIONS FOR AGENDA ITEM 2 - GOAL SETTING/BUDGETING EXERCISE

To help our budget and goal setting discussion, I thought it might be fun to use a SOAR (Strengths, Opportunities, Aspirations, Results) exercise to help the 2022 Goal setting discussion. You may have seen this before. It is a version of SWAT but is a bit more forward thinking with a more positive tone. Our request is for us all to spend a little time thinking about goals and budgeting for 2022 in context of the SOAR exercise. I think this can help guide and organize our thoughts as well as the discussion. We don't have to necessarily solve specific issues or problems, but it would be great to get our creative juices flowing for 2022 and beyond as we plan for the future. All concepts and ideas are welcome. Our hope is that the conversation and discussion will help us all as we begin to concentrate on and build the 2022 Budget as well as endeavors beyond 2022.

If we all could take some time before the meeting to think about 2022 in context of Strengths, Opportunities, Aspirations, and Results, I think it can give us a head start on our conversation.

No need to turn in a completed SOAR worksheet before the meeting. The worksheet is for your use to take notes and organize your ideas.

Thanks for taking some time to consider this exercise.

SOAR WORKSHEET

SOAR

Strengths, Opportunities, Aspirations, Results analysis

SOAR is a process tool rooted in Appreciative Inquiry, designed to assess organizational strengths and initiate change.

Description (from the American Society of Quality)

A strengths, opportunities, aspirations, results (SOAR) analysis is planning tool that focuses an organization on its current strengths and vision of the future for developing its strategic goals.

This tool differs from the commonly used SWOT (strengths, weaknesses, opportunities, and threats) analysis. SOAR engages all levels and functional areas of an organization, while SWOT is typically is typically a top-down approach. **With SOAR, the focus is on the organization, and enhancing what is currently done well, rather than concentration on perceived threats and/or weakness.**

When conducting a SOAR analysis, the basic questions to be answered are:

1. What are our greatest strengths?
2. What are our best opportunities?
3. What is our preferred future?
4. What are the measurable results that will tell us we've achieved our vision of the future?

SOAR is about ...

- Action
- Strength based
- Be the best (good to great)
- Innovation
- Engagement
- Planning - Implementation
- Results
- Plants seeds versus pulling weeds
- Achieving the good vs. avoiding error

SOAR Strengths: What makes us proud?

- What makes us unique?
- What is our greatest achievement?
- How do we use our strengths to get results?
- What about us is world class?

SOAR Opportunities: How do we make sense of the opportunities in our environment?

- What are our stakeholders asking for?

- What are the top 3 opportunities we should focus on?
- Who are our new customers?
- How do we differentiate ourselves?
- What are our new markets?
- Reframe challenges into opportunities.
- Are new skills or resources needed to address our opportunities?

SOAR Aspirations: What do we care deeply about?

- Who are we/who should we become/where should we go?
- What are our most compelling aspirations?
- What strategic initiative(s) would support our aspirations?

SOAR Results: How do we know we are succeeding?

- Meaningful measures
- 3-5 Indicators for a score card
- Resources needed to implement

What are our greatest strengths?

What are our best opportunities?

What is our preferred future?

What are the measurable results that will tell us we have achieved our vision of the future?