

## Strategic Organizational Activity and Planning (SOAP)

### Strategic Plan Components

1. Environmental scan: Determine who the organization's stakeholders including existing partners and others who are not yet engaged.
2. Organization, Plan Origin Date, Revision Dates
3. Core team, titles and contact information
4. Vision: An uplifting and inspiring declaration of the organization's values, hopes and objective/result given unlimited resources and no barriers.
5. Mission: What you do and with whom to make progress toward the vision - this should be succinct enough to be quotable. Leaders should quote the mission consistently and often!
6. Values: The primary values that drive the organization's mission and decision-making:
7. Action plan: Long-term objective(s) addressing one or more items in the Mission Statement with short-term goals, tasks, responsible person(s) and target date

### Suggested Steps

**Step 1.** Identify and arrange a meeting of core team members who have the primary responsibility for this strategic planning initiative.

- Initial tasks include: identify stakeholders to invite to participate, determine the format and frequency of meetings (One large summit? A series of shorter meetings?). Participants should represent all levels of the organization and all functional areas.

**Step 2.** Create an interview questionnaire or guide for gathering information about strengths, perspectives, and aspirations of employees and key stakeholders.

**Step 3.** Engage employees and other stakeholders—including peers, clients, vendors, and partners to discover the conditions that created the organization's greatest successes. Ask powerful, positive questions to generate images of possibility and potential.

- 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 4.** Summarize the organization's positive core, which is its total of unique strengths, resources, capabilities, and assets.



## Strategic Organizational Activity and Planning (SOAP) (cont.)

**Step 5.** 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 6.** Decide which opportunities have the most potential.

**Step 7.** Write goal statements for each of these strategic opportunities and identify measures that will help track the organization's success.

**Step 8.** Plan actions and implement the plan for each identified goal.

- Optional: Ask stakeholders to complete the [Wilder Collaboration Factors Inventory](#) (2) and prepare the results for reviews during meetings. Repeat the Wilder approximately every 6 months or annually.

### SOAP Meeting Sample Agenda

1. Attendee introductions: In 30 seconds or less, who are you and what is your organization's mission?
2. Present an overview of the hosting organization's vision, mission and values
3. An Appreciative Inquiry (AI)
  - 3.1. Divide into small groups. Each group choose a scribe and a reporter then discuss:
    - 3.1.1. What is the host organization doing well?
    - 3.1.2. Opportunities for improvement?
    - 3.1.3. Success stories and data!
4. AI report outs to the large group
5. Next steps

### References

1. Stavros, J. M. & Hinrichs, G. (2009). *The thin book SOAR: building strengths-based strategy*. Bend, OR: Thin Book.
2. Mattessich, P. W., Murray-Close, M., & Monesy, B. R., (2001). *The Wilder Collaboration Factors inventory: Assessing your strengths and weaknesses*. St. Paul, MN: Fieldstone Alliance.

