



SOAR with Your Board

SOAR is an acronym for Strengths, Opportunities, Aspirations, and Results. The SOAR process results in a strategic vision for organizations that is focused, positive, and uplifting. Replace the traditional SWOT (Strengths, Weaknesses, Opportunities, Threats) analysis with an inspirational and engaging activity that energizes your board, identifies the “big ideas,” and creates an exciting vision for your organization.



A fundamental requirement for any major fundraising campaign is a carefully crafted strategic plan. Potential donors and volunteer leaders need to know that the objectives you are funding through your campaign are part of a broader strategic plan designed to advance a bold and exciting vision for the future of your organization. Traditional strategic planning methods tend to focus on the weaknesses of an organization and often get mired in the details of tactics and execution. In order to engage the board and use their time and talent most productively, their role in the strategic planning process should focus on establishing the larger vision and aspirations of your organization. SOAR, introduced by Jacqueline Stavros and Gina Hinrichs, is a method of strategic visioning that will ensure the board is appropriately focused.

The Compass Group believes that strategic planning should be an inclusive process whereby the board and senior staff collaborate on developing a strategic direction or vision, and the staff has responsibility for creating a plan to achieve that vision. To promote this process, The Compass Group has adapted SOAR for nonprofit organizations with an emphasis on engaging the board and senior staff in creating an overarching vision that enhances your mission and drives the establishment and attainment of your goals. Vision inspires your strategic plan, which informs the creation of a Case for Support, ultimately providing the rationale and urgency for your fundraising campaign.

SOAR is implemented as follows:

S - Using a retreat format, attended by board members and senior staff leadership, the strategic visioning process begins by exploring your organization’s strengths. Strengths are identified, discussed, and evaluated in small groups and shared with the larger planning group. This positive engagement and discussion sets the tone for the entire process.

O - Using the strengths identified in the first step, the planning group focuses on opportunities for advancing your mission that your organization can consider. Participants continue to work in small groups, and “out of the box” thinking is encouraged in aligning

your strengths with your opportunities. Again, the small group work is shared with the larger planning group, and trends are identified, and commonalities discussed.

A - The identified strengths and opportunities now allow your planning group to be aspirational; to think about the “big ideas” that will position your organization to have a significant impact in the future; and to identify ideas, concepts, and directions that can be truly called transformational. This sharing of big ideas, declaring the “what ifs,” is exciting for your board! Consensus around the top 2-3 big ideas results in identifying a true overarching vision for your organization. It is a great discussion that promotes active involvement and demonstration of passion and commitment—and it’s fun for everyone involved.

R - The group is finally tasked to focus on the results—to create a picture of what success in achieving the vision would look like. It answers the question, “If we do our work well, what will we be able to say about our organization?” During this step, the group will define the results of this new focus and vision for the organization. This step also includes a discussion of what will be needed by the organization to successfully realize the vision.

Through this exercise, the board and leadership staff will participate in a decision-making process that will ultimately:

- unite them as a group,
- enable them to focus on the real priorities for your organization,
- reinforce your organization’s core values,
- establish general benchmarks for future success; and,
- inspire them to action.

Follow-up to this exercise is critical to its success. Staff will be tasked with creating the strategic plan that will make the vision a reality. The board will review and ratify the strategic plan—a plan they inspired through their collective efforts.

Before embarking on any fundraising effort, it is critical to establish unanimity of focus and conduct a realistic assessment of resources to be directed toward the attainment of an aspirational vision. The SOAR process achieves these goals, builds the esprit de corps between the board and staff leadership, and inspires positive action.

For more details on how you can conduct this process with your board, refer to [The Thin Book of SOAR : Building Strengths-Based Strategy](#), by Jacqueline M. Stavros & Gina Hinrichs; then call Compass to help you put it into action.

About The Compass Group

The Compass Group headquartered in Alexandria, VA, provides strategy, education, and coaching to organizations that must be successful in fundraising. In a working partnership with your staff, volunteers, and board, Compass will help you to enhance and develop the philanthropic culture of your nonprofit organization and achieve fundraising success. Our specialty areas include Arts & Culture, Environmental, Health Care, Higher Education, Human Services, and Independent Schools.

About Frank Pisch

Frank S. Pisch is a senior fundraising executive and nonprofit leader with more than 40 years of successful experience. His strengths include board and staff training, campaign design and management, board and staff development, effective utilization of volunteers and all other aspects of fundraising, including creation of effective fundraising teams.



Mr. Pisch has consulted on capital campaigns and major gift fundraising and strategic planning for a wide spectrum of nonprofit organizations, private and four-year colleges, public universities, community colleges, university foundation boards, independent schools, hospitals and medical centers, human service and environmental agencies, youth groups, arts organizations, and trade associations.

Mr. Pisch has helped his clients raise more than \$4 billion, and as a major gifts specialist he has been involved in the successful solicitation of more than 200 gifts of \$1 million or more.