SOAR Retreat Facilitator Notes

**Resources Needed**

* SOAR questions printed for display
* Copies of Program data (e.g., survey data)
* Flip chart paper
* Big sticky notes
* Copies of agenda

Set up the room with 3 areas or tables – STRENGTHS, OPPORTUNITIES, and ASPIRATIONS. Each table will have prompting questions that have been selected by the Curriculum Developer in consultation with the departmental curriculum leadership.

**Notes for initial consult with curriculum chair**

A SOAR is a good choice for a variety of scenarios in which a department is motivated to undertake significant curriculum changes. This might be for a variety of reasons, such as turnover in faculty contingent, external employer or market pressures, internal or university pressures, changing trends in teaching and learning, or a general desire to improve education to meet student learning needs.

After establishing with the curriculum chair that SOAR may be a good fit, discuss the following:

* The philosophy behind taking a strengths-based approach
* The importance of including multiple stakeholder voices in the retreat
* Data that would be useful to print and bring to the retreat, e.g.:
  + Alumni and student focus group and survey data
  + Curriculum maps
  + Past review recommendations
  + Employment data and employer surveys
* Which SOAR questions are most relevant to the departments’ needs.

## **1. Welcome – 1-1:10**

## **2. Strengths, Opportunities, Aspirations – 1:10-2:00**

Introduction to SOAR

Why SOAR?

*SOAR is a strengths-based approach to planning that encourages all the members in a program to focus on what they’re doing well in order to build on those successes and create strong, unique programs.*

*SOAR stands for:* ***S****trengths* ***O****pportunities* ***A****spirations* ***R****esults*

*For this first section of today we’ll be asking you to divide into groups and each group will take time to consider the STRENGTHS, OPPORTUNITIES and ASPIRATIONS reflected in the current program and the wider context in which it’s embedded. Then, we will lead you through prioritizing your aspirations and the RESULTS component.”*

Welcome the participants (stakeholders) in the room, which may include students, alumni, faculty, staff, and employers, and explain why they have all been invited to share their perspective. For example,

*Each of your experiences are relevant to decisions made about curriculum so please share openly and listen actively.*

If not many stakeholder groups are represented, emphasize the importance of including those voices the best you can using the data sources provided at each table (e.g., student, alumni, or employer surveys). For example,

*Consider not only your own experiences as faculty, but the experiences and feedback from your students, alumni, and partners of the program using the data provided at your table.*

Explain the general purpose of each table.

*At the* ***strengths*** *table, consider what you’re doing well as a program and what you can continue to build on. Identify positive student and alumni feedback, think about what the program is known for both regionally and nationally/internationally, and identify resources or programs you already have in place that make the program strong and attractive.*

*At the* ***opportunities*** *table, discuss where the field/ discipline is heading, what the current and future demands might be for graduates, what students want or need from a program, any gaps in the program that can be re-envisioned as opportunities for growth.*

*The* ***aspirations*** *table is about what you value and are passionate about as a department. What do you currently value, what do you envision as the preferred future for your program, and what resources you have or would need to support your aspirations.*

*The* ***Results*** *aspect of SOAR will be addressed later in the retreat, but, briefly, the results focuses on answering “How will we know we’re successful in achieving our aspirations? What will be in place?”*

*Finally, a reminder that SOAR focuses on what you’re doing well and how to build off of that. So, while you’re brainstorming in the groups, keep that in mind that the main questions we’re looking at addressing are:*

* *How can we play to our strengths to build and support our program?*
* *Who do we want to be in the future, how can we get there?*

To support our activities, we have on hand the following supporting data

List data provided with the help of the departmental curriculum committee.

Activity: In 3 groups, answer the SOAR analysis questions on the flip chart paper related to program strengths, opportunities, and aspirations. At each chart, consider the available data at your station.

Round 1: 20 minutes

Round 2: 15 minutes

Round 3: 15 minutes

Round 1 is longer since groups are starting with a blank page. Round 2 and 3 are shorter as ideas start to flow. Encourage participants to add new ideas and annotate what’s already there (e.g., adding checkmarks)

**3. Debrief and Identifying Possible Priorities – 2:00-2:35**

Each group analyzes, themes, and reports on the key ideas arising from the S, O, or A charts from their third round.

10 minutes – instruct participants to analyze the pages in front of them and look for trends/major themes. Provide them with large sticky notes and instruct them to identify the 3 (or so) main trends that consolidate the information provided

20 minutes – have groups share their findings to the large groups. No more than 5 minutes or so per S, O, and A. While groups are sharing, one facilitator writes down priorities that arise from the discussion on chart paper or board.

5 minutes –Consolidate across groups, identify priorities, discuss commonalities. Review facilitator-identified priorities: ask if any priorities need to be consolidated; where greater clarification is needed; or if there are any priorities that have not been captured.

## **4. Break– 2:35-2:55**

Over the break, take some time to clean up the priorities identified through conversation. Arrange them in a way that will facilitate voting. As participants come back from break, encourage them to start voting.

## **5. What are our priorities? – 2:55-3:05**

Large-group Activity: Review and adjust priorities arising from the debrief

Individual Activity: Indicate top priorities by voting with dots (three votes per person).

## **6. Results – 3:05-3:45**

In small groups participants take a priority and work on results, answering:

1. What is our primary goal or goals related to this theme?
2. Reviewing the goals you created, how will we know we are succeeding?
   1. Considering our aspirations, what meaningful measures will indicate that we are on track in achieving our goals?
   2. What measurable results do we want to see? What measurable results will we be known for?
   3. What resources are needed to implement our most vital projects and initiatives?
3. Small groups share back with the large group

## **6. Wrap Up – 3:45-4PM**

Discussion of next steps

SOAR Analysis

A framework to guide strategic conversations related to identifying and leveraging academic program strengths.

Facilitators and curriculum chairs choose the most relevant ~3 questions per S,O,A, and R. These questions are printed large at the top of the flip chart papers at S,O, and A stations.

|  |  |
| --- | --- |
| **Strengths: What can we build upon in our program?**   1. What are we doing well?    1. What key achievements are we most proud of?    2. What positive aspects of the program have students/ faculty employers/ others commented on? 2. What are we known for?    1. What makes us unique?    2. Why do students choose our program? 3. What key resources and areas of expertise give us an advantage? 4. How do our strengths fit with the realities of the marketplace our students are entering? | **Opportunities: What are the best possible future opportunities?**   1. What changes in demand do we expect to see over the next years?    1. What external forces or trends may positively affect the program? 2. What future external opportunities exist for the program?    1. What are the key areas of untapped potential and/ or collaboration?    2. What are students, employers, and/ or other community members asking for? 3. How can we highlight our program and distinguish ourselves from competing programs? 4. How can we reframe perceived challenges to be seen as opportunities? |
| **Aspirations: What do we care deeply about?**   1. What are we deeply passionate about? 2. As a program, what difference do we hope to make (e.g., to learners, the institution, employers, the community?) 3. What does our preferred future look like? 4. What would we like to be known for? 5. What projects, programs, or processes would support these aspirations? | **Results: How will we know we are succeeding?**   1. Considering our aspirations, what meaningful measures will indicate that we are on track in achieving our goals? 2. What measurable results do we want to see? What measurable results will we be known for? 3. What resources are needed to implement our most vital projects and initiatives? |

*Adapted from* [*Stavros, Cooperrider, and Kelley (2003*](#_ENREF_1)*);* [*Stavros and Hinrichs (2011*](#_ENREF_2)*).*

Adapted from: SOAR Analysis: A Framework to Guide Strategic Conversations Related Identifying and Leveraging Academic Program Strengths by Natasha Kenny and Gavan Watson. Copyright 2013 Open Learning and Educational Support, University of Guelph is made available under the terms of the [Creative Commons Attribution-NonCommercial-ShareAlike 2.5 Canada license](http://creativecommons.org/licenses/by-nc-sa/2.5/ca/)