APBS

Strategic Plan

July 2021 Revision

Dams & Associates, Inc.
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Introduction

The Association for Positive Behavior Support's (APBS) Board of Directors and selected consultant staff participated in an extensive strategic planning process during March and April of 2020. The meeting outcomes are included in this document.

The strategic plan will guide the future development of the Association over the next five years by defining who we are, becoming an essential and valuable resource for our members and strengthening our financial sustainability. Our commitment to authentic inclusivity of diverse representation as well as increasing active and meaningful engagement of our membership with the Association will be strengthened by implementing the action steps of this plan.

The strategic plan was written to serve as a road map to achieving our vision and guiding our activities and decisions. The Board will engage in ongoing progress monitoring toward achieving our goals.

The Board and consultant staff of APBS are appreciative of the work of everyone involved and are excited about implementing the strategic plan. We are confident that it will guide the Association to a successful and sustainable future that is aligned with our mission.

Timothy P. Knoster, Ed.D.
Executive Director

Rose Iovannone, Ph.D., BCBA-D
President, Board of Directors

Our Guiding Principles

Our Mission

The global mission of APBS is to enhance the quality of life of people, across the life-span, by promoting evidence-based and effective positive behavior support to realize socially valid and equitable outcomes for people, families, schools, agencies, and communities.

Based on the global mission for APBS, we have adopted the following statement of equity:

"APBS is committed to equity, human rights, and social justice for historically marginalized and oppressed communities, families, practitioners, and students. Our work informs individuals, institutions, and organizations through systems development and strategies to disrupt interpersonal and structural forms of inequity, discrimination, and racism in order to promote equitable and meaningful outcomes for all."

Our Vision

Members of APBS across the world will interact with the Association as their primary reliable resource on positive behavior support and view their engagement as personally and professionally beneficial.

Our Core Values

APBS operates in an empirical and data-driven manner, emphasizing authentic representation and ethical and fiscally responsible behavior that embed the core positive behavior support values and organizes around the following core values.

Empirical and data-driven decision-making	APBS decisions are made based on data and are ecologically and socially valid, and equitable for people, families, schools, agencies, and communities.
Authentic representation	APBS' culture is inclusive and intentional by promoting quality of life for all persons, giving voice to the voiceless, being culturally responsive, and maintaining trustworthiness and respect.
Ethical and fiscally responsible behavior	APBS fiscal responsibility embodies positive behavior support by making transparent decisions with equity and fairness while maintaining a sustainable and financially viable organization.
Commitment to systems change	Positive behavior support's commitment to a multi-tiered logic and sustainability requires an awareness of systems variables that promote or inhibit implementation fidelity and successful outcomes.

Positive Behavior Support

Definition

Positive behavior support is an approach to behavior support that includes an ongoing process of research-based assessment, intervention, and data-based decision making focused on building social and other functional competencies, creating supportive contexts, and preventing the occurrence of problem behaviors. Positive behavior support relies on strategies that are respectful of a person's dignity and overall well-being and that are drawn primarily from behavioral, educational, and social sciences, although other evidence-based procedures may be incorporated. Positive behavior support may be applied within a multi-tiered framework at the level of the individual and at the level of larger systems (e.g., families, classrooms, schools, social service programs, and facilities). (Kincaid et al, 2016.)

Core Values of Positive Behavior Support

The definition of positive behavior support reflects the core values espoused by Carr et al., 2002.

- **Comprehensive life-style change/quality of life**
- **Life span perspective**
- **Ecological perspective**
- **Stakeholder participation**
- **Social validity**
- **Multi-component systems-change perspective**
- **Flexible scientific practices**

Understanding the Relationship of Positive Behavior Support and the Positive Behavior Intervention and Support (PBIS) Framework

Positive behavior support is deeply rooted in the social and civil rights movements of deinstitutionalization and inclusion for people with severe disabilities (Bambara, 2005) and the conceptual and methodological framework and procedural foundations of applied behavior analysis (ABA; Cooper et al., 2020). Over time, connections emerged between positive behavior support with individuals with severe behavioral needs and complementary research being conducted in classrooms and schools that involved applied demonstration projects addressing broader systemic issues for helping students with behavioral concerns (Gresham, 1991; Sugai & Horner, 1999; Walker et al., 1996). The application of positive behavior support has been increasingly expanded across diverse populations (e.g. across the life span and with individuals with various disabilities and the general public at large) and contexts (e.g., home, school, and community settings).

As the application of positive behavior support has expanded, various units of analyses have emerged (e.g., application positive behavior support with individuals as well as development of organization/systems-level application). As a result of this expanded focus on application in organizations/systems (and initially and most specifically, schools), the term "positive behavioral interventions and supports" (PBIS) was coined. An illustration of this expansion and impact in the field is the currently funded U.S. DOE OSEP Center on PBIS that is systematically disseminating a well-recognized framework of effective multi-tiered interventions and supports for entire schools.

Acknowledging the history of positive behavior support and PBIS (at a minimum as it pertains to schools), it is important to note that PBIS is considered a framework for providing support to meet the needs of all students through the application of a multi-tiered logic that aligns with a public health approach. Positive behavior support, while related, is the term used to reflect the array of ecologically and socially valid practices with individuals as originally described by Carr and colleagues in the seminal article in 2002 (Positive behavior support: Evolution of an applied science). As such, positive behavior support serves as the broader, umbrella term in the field within which the application of the PBIS framework occurs (e.g., applications within schools, human service settings, juvenile justice settings).

Adapted from:

Kincaid, D., Dunlap, G., Kern, L., Lane, K. L., Bambara, L. M., Brown, F., ... & Knoster, T. P. (2016). Positive behavior support: A proposal for updating and refining the definition. *Journal of Positive Behavior Interventions, 18*(2), 69-73.

Dunlap, G., Kincaid, D., Horner, R. H., Knoster, T., & Bradshaw, C. P. (2014). A comment on the term "positive behavior support". *Journal of Positive Behavior Interventions, 16*(3), 133-136.

A Brief History of APBS

2003		
Filed initial articles to incorporate and establish APBS as a 501 © 3 non-profit organization. Held initial conference in Reno, Nevada. APBS originally envisioned as a virtual, multi-disciplinary professional organization to advance research, policy and practice of positive behavior support.		
		2007
		APBS successfully completed the advanced ruling period as a non-profit entity and formally published initial bylaws. APBS held its 4th annual conference in Boston drawing over 1200 attendees. APBS initially established geographic and thematic networks in the continental U.S.
2009		
APBS approved creation of a dedicated family elected board seat to better represent the stakeholders who identify as family members.		
		2010
		APBS held its 7th annual conference in St. Louis with attendance reaching 1,300 participants with an increasing presence of international attendees. APBS continued increasing allocation of resources to support committee functions in concert with network development. The number of APBS website page views during this year exceeded 380,000.
2012		
APBS reviewed and made changes to the initially established bylaws as well as established one initial ex-officio seat on the Board of Directors for representation from international networks and strategically initiated allocation of resources to support international networks. APBS held its 9th annual conference in Atlanta with cumulatively attendance across all conferences to this date exceeding 10,000 participants.		
		2014
		APBS expanded the size of elected board members based on revisions to the bylaws to 15 elected seats to address increasing workload related to impact of the organization. Additional ex-officio seats were as well added to further represent constituency groups including additional international representation. APBS membership topped 800 members for the first time and the 11th annual conference occurred Chicago.

A Brief History of APBS - continued

2016		
APBS began providing competitive mini-grant awards to facilitate expansion of outreach by established APBS networks as well as providing increasing degrees of support to the APBS Student Network. Investment to expand the infrastructure of operations occurred to further expand outreach and impact of the organization. Concurrently, annual awards for research, practitioner endeavors and leadership were also expanded by APBS in alignment with the annual conference which occurred in San Francisco which hosted over 1,500 conference attendees. APBS membership reached 1000 strong for the first time.		
		2017
		APBS established an ad hoc Equity committee to ensure that diversity and equity content were infused within conference and webinar offerings. The Equity Committee adapted the UNESCO World Education Forum 2015 definition of equity and began collecting data on ethnic and racial diversity, underrepresented groups, and access across our organization.
2018		
APBS awarded the first international network competitive mini-grant awards to further support global impact. The Board of Directors was again expanded to be comprised of 18 elected seats plus ex-officio appointments to continue the expanded impact both domestically in the U.S. and internationally. Infrastructure investments were increased with targeted outreach and engagement with members in the Intellectual and Developmental Disabilities community as well as constituents from the field of mental health. APBS membership reached the 1,500 mark for the first time and the 15th annual conference occurred in San Diego with over 1,700 attendees.		
		2020
		APBS engaged for the first time in an externally facilitated strategic planning process resulting in a revised mission and vision statement and a longitudinal game plan to further broaden the impact of the organization. While maintaining its original intent as a virtual, multi-disciplinary professional organization, alignment and utilization of resources in a manner to further accomplish the mission while striving towards the broader global vision became the focal point of organizational endeavors in the short-term in concert with a longitudinal strategic plan.

Our Strategic Framework

Our Mission

The global mission of APBS is to enhance the quality of life of people, across the life-span, by promoting evidence-based and effective positive behavior support to realize socially valid and equitable outcomes for people, families, schools, agencies, and communities.

Our Goals

1. The board of directors and members view the Association as their primary reliable resource on positive behavior support
2. Members are meaningfully engaged with the Association and find their engagement personally and professionally beneficial
3. New Members join the Association
4. Infrastructure enables effective and efficient communication and decision-making
5. APBS operates in an ethically and fiscally responsible manner

Our Vision

Members of APBS across the world will interact with the Association as their primary reliable resource on positive behavior support and view their engagement as personally and professionally beneficial.

Empirical and data-driven decision-making | Authentic representation | Ethical and fiscally responsible behavior | Commitment to systems change

Our Core Values

Our Goals and Strategies

Goal 1: The board of directors and members view the Association as their primary reliable resource on positive behavior support

1. Strategy a. Benchmark	Target Date	Lead	Status
1. Develop a transition plan to engage students entering their early career		CANDO	
2. Develop and implement a clear international strategy		CANDO	
3. Develop an online repository of relevant articles (e.g., OSEP-funded PBIS Center, other externally funded initiatives, definitions of positive behavior support and PBIS)		PAD	
4. Update conference agenda to include venues for increasing member engagement		TEC	
a. Start conference with presentation on who we are		TEC	
b. Include slides on APBS mission, vision, core values, goals, and difference between positive behavior support and PBIS for international networks		TEC	
c. Conduct a forum for two-way communication with members		TEC	
d. Consider ambassadors or mentors at the conference		TEC	
5. Explore dedicated seats on the board for different topics		Equity Committee	
6. Build consensus paper on APBS identity and disseminate widely		Equity Committee	
a. Determine who we are and who we are not		Equity Committee	

b. Capture history		Equity Committee	

Goal 2: Members are meaningfully engaged with the Association and find their engagement personally and professionally beneficial

1. Strategy a. Benchmark	**Target Date**	**Lead**	**Status**
1. Strengthen virtual engagement opportunities for national and international members outside the conference		CANDO	
2. Revisit and clarify definition of thematic networks (e.g., special interest groups or communities of practice)		CANDO	
3. Bring in diversity expertise to develop diversity strategies into engagement		Equity Committee	
4. Identify access barriers (e.g., information access, economic barriers, . . .) and reduce them as feasible to ensure an increasingly diverse membership		Equity Committee	
a. Survey members on engagement barriers and desired engagement		Equity Committee	
5. Conduct focus groups to obtain diverse perspectives around different topics to increase member engagement		Equity Committee	
6. Communicate about benefits of membership		PAD	
7. Clarify the process for becoming a committee volunteer		PAD	
8. Develop a formal process for disseminating committee work to the membership		PAD	

9.	Identify audience, scope, and goal for the following: JPBI, newsletter, and exploring a practitioner journal and consider disconnecting the newsletter from the journal (e.g., online)		PAD	
10.	Use conference to better engage membership		TEC	
a.	Live-stream and record conference sessions		TEC	
b.	Set up input/feedback stations at the conference		TEC	
c.	Reformat the conference to accommodate special interest groups so they have time for face-to-face meetings		TEC	
d.	Develop cohort learning (one-year groups between conferences)		TEC	
e.	Conduct a networking session with the board outside the required annual membership meeting		TEC	
f.	Develop a member recognition program (e.g., length of membership)		TEC	

Goal 3: New members join the Association

1. Strategy a. Benchmark	Target Date	Lead	Status
1. Specialized outreach to student members with the goal to convert them to full members after graduation		CANDO	
2. Revise membership information and website to reflect the new mission, vision, and core values		Crystal & Gretchen	
3. Develop a plan for using technology beyond the conference and webinars		E-Learning	
4. Develop an outreach plan targeting families and community members (e.g., establish networks, special interest groups, foundations)		Family & IDD	
5. Enhance current marketing efforts		PAD	
a. Consider bringing in expertise on marketing		PAD	
b. Strengthen social media outreach		PAD	
6. Survey non-members on why they are not members		TEC	
7. Explore shared memberships with other organizations		Family	

Goal 4: Infrastructure enables effective and efficient communication and decision-making

1. Strategy a. Benchmark	Target Date	Lead	Status
1. Enhance current orientation process for new board members, executive committee, committee chairs, and committee members		Nominations and Election Committee	
2. Revisit organizational structure to accomplish and sustain long-term organizational goals		SPSC	
a. Bring in a nonprofit consultant		SPSC	
b. Explore all viable options (e.g., moving to full-time staff, use FTE salaries more strategically)		SPSC	
c. Develop a transition and/or succession plan		SPSC	
d. Clarify the roles of paid staff, volunteers, board members, ex-officio members, chairs of special interest groups		SPSC	
3. Establish an organizational dashboard		SPSC	
4. Create and maintain the implementation schedule		SPSC	

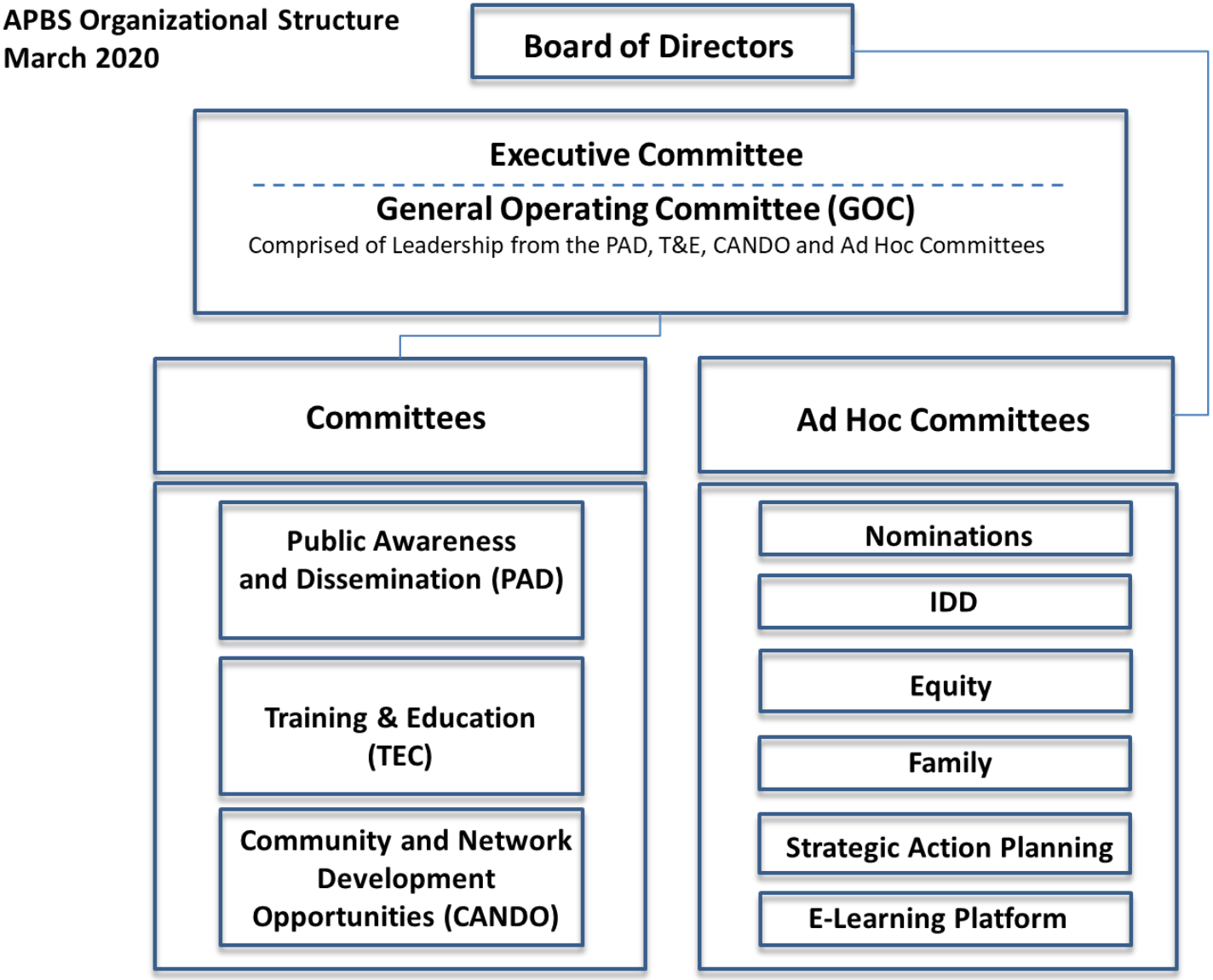
Goal 5: APBS operates in an ethically and fiscally responsible manner

1. Strategy a. Benchmark	Target Date	Lead	Status
1. Explore new services and products that result in revenue directly or indirectly		E-Learning	
2. Review all activities to determine return on investment and re-allocate funds as feasible		GOC/EC	
3. Develop a plan for enhancing and sustaining revenue		SPSC	
a. Increase membership		CANDO	
b. Consider increasing all fees		Executive Committee	
c. Consider differentiating membership fees for international members		Executive Committee/ CANDO	
d. Explore new sources of revenue (e.g., grants, CEUs for BACB, psychology – at conference and online; conference sponsors and exhibitors, philanthropy)		Executive Committee	
e. Increase conference attendance		TEC	
4. Build capacity for exhibitors and sponsors to grow		TEC	
5. Revise the site selection and setup processes to enhance conference attendance		TEC	
6. Work with local organizations at each year's conference location so they can be included before and during the conference		TEC	

Key to Lead Committee Across Goals 1-5

Acronym	Name
EC	Executive Committee
CANDO	Community and Network Development Opportunities
GOC	General Operating Committee
IDD	Intellectual and Developmental Disabilities
PAD	Public Awareness and Dissemination
TEC	Training and Education Committee
SPSC	Strategic Planning Steering Committee

APBS, as per its By-Laws, establishes working committees on an annual basis.



Definitions

APBS Networks

Thematic networks *are defined as networks that are focused on a particular topical area of interest. For example, these are networks such as the "PBIS State-wide Leaders Network" which focuses on the ways that state-based leaders can systematically support implementation in school-based settings. This group was formed by leaders who had already galvanized around this topic of interest and becoming an APBS network allowed for a platform to meet and connect that was not attached to a particular location or entity. In the past APBS has invited folks to focus on particular areas of interest but without FTE to support development of a network, it has been difficult for APBS to "force" a network to develop because APBS does not control what networks do, how they run, etc. (e.g., networks are loosely coupled communities of practice NOT chapters). In the past, when there have been particular areas of interest/need identified by the board (such as IDD) an ad-hoc committee and a consultant has been appointed to support this work/area.*

International Networks *are networks that are based outside of the USA in a given geographical area (e.g., Europe, Australia, Japan). Note: Single geographical areas (e.g., Japan) may have a network that is part of another network focused on a larger area/region (e.g., Japan has an independent network but it is also part of the PBSA. Asia network).*

Domestic Networks *are networks that are based in the USA in a given geographical area (e.g., Maine). Note: Single geographical areas (e.g., Maine) may have a network that is part of another network focused on a larger area/region (e.g., Maine has an independent network but it is also part of the NEPBIS network).*

Measures of Success

An important element of any strategic plan is a description of success in quantitative ways. Measures of success define the qualitative aspects of success in pursuing your mission and vision and accomplishing the strategic goals.

Measures

Measure of success are a **description** of how you will gauge high-level success for the mission, vision, and strategic goals. The measure of success does not include a target or direction. They are also called key performance indicators (KPIs).

Example: You are designing a highly efficient sports car. Measures of success may include "top speed (mph)," "fuel consumption (mpg)," and "acceleration (time from 0 to 60 mph in seconds)." Note – there is no numerical value attached.

Targets

A desired **numerical value** you would like to achieve for a given measure of success. In the absence of an established baseline or clear industry standards, the target may be left blank. The first couple of data collection cycles will provide you with a baseline against which you may then establish sensible targets.

Example: Targets for your sports car's measures of success may be expressed as "top speed = 220 mph"; "fuel consumption = 60 mpg"; and "acceleration = 2.5 seconds."

Organizational Dashboard

An overview graphic that shows the key measures of success for an organization. A dashboard should include the goal statement, measure of success, historic performance, the current target, and the current status.

'Less is more' is an adage that should guide the development of your dashboard. The more you can show on one page or one web screen, the better. Detailed data may be provided via drill-down links.

Template for Developing Accountability for Mission, Vision, and Strategic Goals

An important element of successful strategy implementation is the development and tracking of success in quantitative ways.

We encourage you to use tables like these to summarize the critical measures of success for your mission, vision, and goals. Targets describe what level of a measure is to be achieved. More detailed measures may be tracked as necessary to inform these high-level metrics.

Metrics for the mission and vision may be based on or utilize metrics for individual strategic goals.

Mission and Vision

Mission	**Measures of Success**	**Targets (if applicable)**
The global mission of APBS is to enhance the quality of life of people, across the life-span, by promoting evidence-based and effective positive behavior support to realize socially valid and equitable outcomes for people, families, schools, agencies, and communities.	•	•
	•	•
	•	•
Vision		
Members of APBS across the world will interact with the Association as their primary reliable resource on positive behavior support and view their engagement as personally and professionally beneficial.	•	•
	•	•
	•	•

Strategic Goals

Strategic Goals	Measures of Success	Targets (if applicable)
1. The board of directors and members view the Association as their primary reliable resource on positive behavior support	•	•
	•	•
	•	•
2. Members are meaningfully engaged with the Association and find their engagement personally and professionally beneficial	•	•
	•	•
	•	•
3. New members join the Association	•	•
	•	•
	•	•
4. Infrastructure enables effective and efficient communication and decision-making	•	•
	•	•
	•	•
5. APBS operates in an ethically and fiscally responsible manner	•	•
	•	•
	•	•

Template: Annual Dashboard (optional)

APBS Strategic Dashboard - Annual

Updated: _____

Strategic Goals	2018	2019	2020	2021	2022	Target	Target Date	Status
1. The board of directors and members view the Association as their primary reliable resource on positive behavior support								
								▲
								▼
								■
2. Members are meaningfully engaged with the Association and find their engagement personally and professionally beneficial								
3. Non-members join the Association								
4. Infrastructure enables effective and efficient communication and decision-making								
5. APBS operates in an ethically and fiscally responsible manner								

Explananations

1. Text here
2. Text here

Meets or exceeds targer

Caution

Below target - action needed

▲ Performance Up

■ No Perrformance Change

▼ Performance Down

Based on http://oaa.osu.edu/board-of-trustees-scorecard.htm

Template: Monthly Dashboard (optional)

APBS Strategic Dashboard 2020 - Monthly

Updated: _____

Strategic Goals	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec
1. The board of directors and members view the Association as their primary reliable resource on positive behavior sup												
2. Members are meaningfully engaged with the Association and find their engagement personally and professionally beneficial												
3. Non-members join the Association												
4. Infrastructure enables effective and efficient communication and decision-making												
5. APBS operates in an ethically and fiscally responsible manner												

Explananations

1. Text here
2. Text here

Based on http://oaa.osu.edu/board-of-trustees-scorecard.html

Implementation Schedule (Template)

This schedule may be adjusted based on emerging priorities as well as staffing and budget considerations.

Strategies and Tactics (sorted by target completion date)	**2020 Q3**	**2020 Q4**	**2021**	**2022**	**2023**

Next Steps

- Communicate the Strategic Plan to internal and key external stakeholders.
- Have internal conversations on how staff and board members can contribute to advancing the mission and move APBS toward its vision.
- Develop and implement detailed tactical action plans as needed.
- Track progress and identify data trends.
- Focus on strategy throughout the year through strategy-based meeting agendas and annual progress reports.
- Report updates and results to all key stakeholders regularly.
- Use process and outcome metrics for continuous improvement toward service excellence.
- Celebrate success and share mission moments!
- Regularly review, validate, and update the strategies.

Planning Participants

We thank these individuals for their contributions to the strategic plan:

Allison Bruhn	University of Iowa (Co-Chair Nominations Ad Hoc Committee)
Celeste Rossetto Dickey*	University of Oregon (Co-Chair CANDO Committee)
Danielle Empson	McDowell Institute at Bloomsburg University (Executive Functions & PAD Committee Support)
Kaci Fleetwood	University of Nevada – Reno
Rachel Freeman	University of Minnesota (Chair IDD Ad Hoc Committee)
Shanna Hirsch	Clemson University (Secretary)
Rose Iovannone*	University of South Florida (President)
Don Kincaid*	University of South Florida (Tri-Chair T&E Committee)
Tim Knoster*	Bloomsburg University (Executive Director)
Tina Lawson*	Pennsylvania Training and TA Center (Co-Chair PAD Committee)
Ashley MacSuga-Gage	University of Florida (Network Supports Consultant)
Barry McCurdy	Devereux Center for Effective Schools (Vice President)
Sara McDaniel	The University of Alabama (Co-Chair PAD Committee and Co-Chair Nominations Ad Hoc Committee)
Kent McIntosh	University of Oregon
Tim Moore	Fraser Clinical Services (Chair Evidence Based Practices Ad Hoc Committee and Tri-Chair T&E committee)
Satish Moorthy	New York City Department of Education (Co-Chair Equity Ad Hoc Committee)
Kelsey Morris	University of Missouri (Tri-Chair T&E Committee)
Bob Putnam*	May Institute (Treasurer and Co-Chair Fee Restructuring Ad Hoc Committee)

*

Denotes member of Strategic Planning Steering Committee

Planning Calendar

September 26, 2019	Pre-Planning Meeting (1.5 hours) • Review planning process • Prepare stakeholder engagement and retreat agendas	Strategic Planning Steering Committee (SPSC)
October-November	Stakeholder Engagement Survey	Dams & Associates
January 24, 2020	Review Stakeholder Engagement Draft Report	SPSC
	Strategic Planning Retreat Miami, Fla	
March 09	Strategic Planning Retreat Day 1 • Review stakeholder engagement results • Affirm the mission • Create drafts of vision and core values • Conduct trend analysis	Board of Directors Leadership Staff
March 09	Follow-up Session • Fine-tune the guiding principles • Prepare Planning Retreat #2	SPSC
March 10	Strategic Planning Retreat Day 2 • Finalize guiding principles • Conduct SWOT and gap analyses • Brainstorm strategies to close gaps	Board of Directors Leadership Staff
March 19	Write the Plan – Session #1 (2.5 hours) • Review results from planning retreats and edit initial strategies	SPSC
April 1	Write the Plan – Session #2 (2.5 hours) • Set target completion dates and identify strategy leads • Develop goals	SPSC
April 20	Write the Plan – Session #3 (2.5 hours) • Review strategies against board planning results and make final adjustments • Discuss rollout and implementation Dams & Associates submits the completed strategic plan Board of Directors reviews and approves the final plan	SPSC

Definitions

Goal

A measurable statement directly contributing to the vision that is observable and measurable. Goals describe the *future state* that will be achieved if all strategies underneath a goal are successfully implemented ("mini-vision"). It does not describe an action.

Strategy

An action statement that contributes to achieving the goal within a specified target completion date and by a specified lead. Each goal will have multiple strategies.

A strategy specifies the result of the action – an observable *deliverable* (e.g., a plan, process, procedure, statement, report, draft, equipment, facility, etc.).

Benchmark

A benchmark helps achieve a strategy. Not every strategy requires tactics. Tactics may have their own target completion dates and leads that may or may not differ from the target completion dates for the strategy.

Measure of Success

A description of how the organization will gauge high-level success for the mission, vision, and strategic goals. The measure of success does not include a target or direction.

Target

The quantitative aspects of success for each measure. It is a desired numerical value needed to be achieved for a given measure of success. In the absence of established baselines or clear industry standards, targets may initially be left blank to avoid setting targets that are too low or too high. The first couple of data collection cycles will provide a baseline against which sensible targets may be established.

Rollout and Implementation Considerations

Strategy Rollout

1. Introduce the plan to all board members, committee members, and staff
2. Share the entire plan or summary with important external stakeholders
3. Post the plan summary on the website

Strategy Implementation

1. Focus on the mission and vision in all (major) decisions. Use them when recognizing individual accomplishments.
2. Sustain strategic focus via meeting agendas
3. Staying on track: Internal and external accountability
4. Track and report progress
5. Celebrate success
6. Update strategic plan annually

Tracking Progress versus Tracking Results

1. Progress
    a. Strategy implementation
    b. On time, completed, behind schedule

2. Results
    a. High-level measures of success
    b. Mission, vision, goals

Rollout and Implementation Planning Template

This template needs to be adapted to your specific needs as you determine how to best communicate your strategic plan to every member of your organization as well as key external stakeholders.

Task	Date	Optional Activities
Communicate the plan to all board members, committee members, and staff		Use the strategic plan summary as a starting point Share plan with managers and supervisors Conduct an all-staff meeting
Disseminate the plan to stakeholders		Share summary with stakeholders and other community partners Use the website to reach the community Identify who should receive a full strategic plan
Monthly leadership meetings		Updates by strategy leads. Identify barriers to progress. Add standing agenda item of "mission and vision moments"
Quarterly board updates		Share successes and "mission/vision moments" and progress toward the vision. Consider sharing some of these via website, social media, and newsletter
Annual reviews		Conduct a deeper review that includes the results from the strategic planning retreats: Are you making progress on addressing weaknesses, threats, and gaps? Identify which strategies have been accomplished and remove them from the active plan. Create a section for accomplished strategies. Have new weaknesses or threats emerged that need to be addressed with new strategies? As strategies are completed, determine if new strategies are needed for any of the goals. Review your dashboard and determine whether the key metrics are moving in the right direction.

Overcoming Barriers to Implementation

Define success

- Success and failure depends to a large degree on how you define it.
- If you implement half of your strategies and improve even in a small way your bottom line or customer service or employee morale – that could be considered a success over what might have happened if you had no plan at all.

Link your strategic plan to your budget process

- Conclude the planning process – or future updates – by the time the annual budgeting process starts.
- Include new initiatives in the budget.
- Hard choices must be made, and having these conversations early provides plenty of time to develop a budget that provides for strategic priorities.

Link incentives to strategic plan implementation progress and success

- If you consider an incentive system, make sure measures are related to your strategic plan.

Spend time on strategy

- Use strategy-based agendas for leadership and board meetings.
- Schedule quarterly progress reviews with leadership and board.
- Schedule annual refresher meeting with leadership and board.

Communicate – communicate - communicate

- Leaders model the importance of strategy by talking about the mission and vision to all volunteers, staff, and members any time they have a chance,
- Leaders cannot delegate strategy communication to a newsletter or mass email.
- Do not be afraid to over-communicate. It shows the mission and vision are important to you!

Contact Information

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