2013 to 2017 Strategic Plan

Version 1.0.0
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2013 to 2017 Strategic Plan for The Software Defined Radio Forum Inc.
Doing Business As the Wireless Innovation Forum

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Intended Audience

This document is intended for use by The Software Defined Radio Forum Inc. doing business as the Wireless Innovation Forum (hereafter "the Forum"), its member organizations and its partners to communicate the Forum's Strategic Plan as approved by the Forum Board of Directors in December 2012. It is also intended for use by potential members and partners as tool for evaluating participation in the Forum, and by the advanced wireless community as a whole to help to understand the Forum's mission and objectives.

1 Strategic Planning Input and Process

The process followed by the Forum in preparing this strategic plan was comprehensive and based on inputs derived from the following activities:

- Review of Organizational Metrics – This activity established a baseline from which the Forum can evolve in executing on a new strategic plan. Specific items evaluated in this review included:

  o Membership Data – An analysis of the Forum's membership from 2007 to 2012, including a first and second order evaluation of membership by size, region, primary market, and position in the value chain.

  o Meeting Data – An analysis of member and non-member attendance at Forum General Meetings and Technical Conferences, including an analysis of attendee representation by region and an analysis of meeting attendance correlated against meeting location, workshop topic, and external events.

  o Finance – An analysis of the Forum's financial results from 2007 to 2012, including an evaluation of any significant financial events that occurred.

  o Performance – An evaluation of how the Forum and its members have performed against stated objectives, including an analysis of what contributed to the Forum's successes, and what lessons could be learned in areas of non-performance

- Market Analysis – This activity evaluated the Forum in the context of the broader advanced wireless market. As a part of this evaluation, a SWOT (Strength, Weaknesses, Opportunities, Threats) analysis was performed to position the Forum with respect to other organizations, based on input from Forum members, as shown in Table 1.

Table 1: Organizations Evaluated in the Forum's SWOT Analysis

"Standards" Bodies	"Trade Associations" and other related bodies
International Telecommunications Union (ITU)	CTIA
European Telecommunications Standards Institute (ETSI) Technical Committee on Reconfigurable Radio Systems (TC-RRS)	NGNM
3GPP	Wireless Innovation Alliance
IEEE DySPAN Standards Committee	White Space Alliance
Object Management Group (OMG)	New America Foundation
	Cambridge Wireless Consortium
	TM Forum

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- Member Interviews – The Forum conducted one-on-one interviews with representatives of over 40 member organizations to ascertain the value of the Forum to their organization and to understand the areas that the Forum needs to address to remain relevant. While interviews could not be held with every member organization given the time frame involved, the organizations interviewed were selected as a representative sample to ensure proper coverage of markets, regions and value chain.

- Entrance and Exit Interviews – The Forum also conducted one on one interviews with each organization that joined the Forum or withdrew from the Forum from 2007 to 2012 to ascertain the reasons for this decision. Entrance interviews reinforced information gathered in interviews with existing members, while exit interviews identified that the primary reasons that organizations left the Forum.

2 Key Findings

In analyzing this data, findings emerged relevant to revising the strategic plan in three key areas: areas where the Forum has been successful, issues affecting the relationship between the Forum and its members, and the needs that the Forum needs to meet in supporting its members moving forward.

2.1 Forum Successes

The environmental scan outlined above identified a number of areas where the Forum has been successful in executing on the current strategic plan.

1) The Forum is regarded as one of the few entities that successfully crosses defense, civil and commercial domains, facilitating transfer of ideas between domains to the benefit of all participants. This value is seen as diminishing in recent months as the Forum is increasingly viewed as defense focused and so this issue needs to be addressed in the revised strategy.
2) The Forum is also one of the few organizations that crosses the boundaries between academic, research labs, manufacturers and suppliers providing a successful bridge between researchers and industry. Other organizations that try to fulfill this role are seen as too academic in nature, or too commercially focused, and so the Forum received high marks by both members and non-members in this area.
3) The Forum has been influential, providing a voice that is heard by decision makers and other stakeholders across the advanced wireless community. Evidence of this can be found in the number of times documents produced by the Forum's members are referenced in procurement documents, notices of inquiry, etc. The most influential documents developed under the current strategy and cited by the Forum's members, partners and customers include:

   - **Top 10 Most Wanted Wireless Innovations** (Document WINNF-11-P-0014-V1.0.0)
   - **Use Cases for Cognitive Applications in Public Safety Communications Systems Volume 2: Chemical Plant Scenario** (Document WINNF-09-P-0015-V1.0.0)

- **Quantifying the Benefits of Cognitive Radio** (Document WINNF-09-P-0012-V1.0.0)
- **International Tactical Radio Security Services API Specification** (Document WINNF-09-S-0011-V1.0.0)
- **Transceiver Facility Specification** (Document SDRF-08-S-0008-V1.0.0)
- **Test and Certification Guide for SDRs based on SCA - Part 1: SCA** (Document SDRF-08-P-0007-V1.0.0)
- **Use Cases for Cognitive Applications in Public Safety Communications Systems - Volume 1: Review of the 7 July Bombing of the London Underground** (Document SDRF-07-P-0019-V1.0.0)

Moving forward, any new strategy needs to build from these successes in supporting the members further.

2.2 A Key Issue Driving the Forum's Members Activities is Market Uncertainty

The Forum's membership is largely concentrated in a few market segments: defense, public safety, "white space" communications and other related commercial markets. Since the last strategic plan was developed significant changes have occurred in the market driving increased uncertainty related to these markets in three areas:

- Regulatory uncertainty surrounding licensed and unlicensed access to white space spectrum, spectrum sharing and federal allocations is delaying business decisions on cognitive radio and dynamic spectrum access development from by both internal and external funding sources
- Market fragmentation in both emerging and existing markets and the related proliferation of standards, often without real business drivers, is causing repetition of effort and confusion in understanding requirements for advanced research and next generation radio products
- Cuts in spending due to debt reduction in the US, the ongoing Euro zone crisis and other related conditions worldwide have caused significant uncertainty in the funding profiles for government acquisition programs and for government technology incubator programs such as the such as the Small Business Innovative Research program in the United States. This uncertainty is compounded in the United States by the apparent transition of the US Department of Defense from an acquisition model to a procurement model for communications technology.

This uncertainty necessarily leads to decreased budgets. The investment in advanced research supporting these markets has been significantly reduced in the last two years. To address these cuts, many of the Forum's member organizations have ceased funding of research into SDR technologies, which is largely considered a solved problem, in favor of programs focused on spectrum sharing as that is seen as have a higher long term return. Other organizations have dealt with decreased budgets by exiting the market or focusing almost exclusively on existing production contracts.

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The impact of this on the Forum has been twofold:

- Less innovation is occurring, especially in the area of software defined radio, and therefore the value the Forum brings in bridging communications between innovators has lessened
- Representatives of the Forum's member organizations have significantly constraints on their ability to volunteer. The "do more with less" mentality of the current environment has significantly reduced the amount of time they have to support many of the "sandbox" projects that the Forum has historically hosted, and the reductions in their travel budgets have significantly curtailed their ability to participate in face to face project meetings.

2.3 Change drivers and scenario planning

In addressing these issues, the analysis showed that collaboration on standards, although important, was no longer the driving factor for the members of the Forum. Instead, the focus of the Forum needs to shift to expanding opportunities as follows:

1) The Forum needs to further strengthen the bridge between research and industry, providing a venue for researchers to share the latest innovations in SDR, CR and DSA and to gain feedback on market requirements and their research direction. As a key part of this, the Forum should work to facilitate partnerships between technology developers and their customers at all levels of the wireless value chain to help more quickly move technology from the laboratory into deployment (see Figure 1).

2) The Forum should work, through its members, to strengthen ties with procurement authorities and government regulators world-wide to enhance understanding of emerging requirements, to demonstrate the value of SDR, CR, DSA and related technologies in addressing the issues inherent in spectrum management, and to educate on business and regulatory barriers preventing broader deployment. Specific areas of emphasis include:

   a. Mitigating threats to infrastructure and establishing requirements for high reliability in essential and critical communications
   b. Optimizing the use of licensed versus unlicensed spectrum sharing and the establishment of public versus private spectrum.

3) The Forum, again through its members, should strive to contain fragmentation in the market by establishing technology partnerships, coalitions and alliances to harmonize activities where appropriate and to coordinate support of emerging requirements for spectrum sharing technologies and peer to peer communications such as instantaneous pre-emption, interference mitigation and coexistence. Such activities should define areas where advanced R&D funding is required to achieve the consolidated objectives, and then promote these areas to investors and government research centers as the keys to future success.

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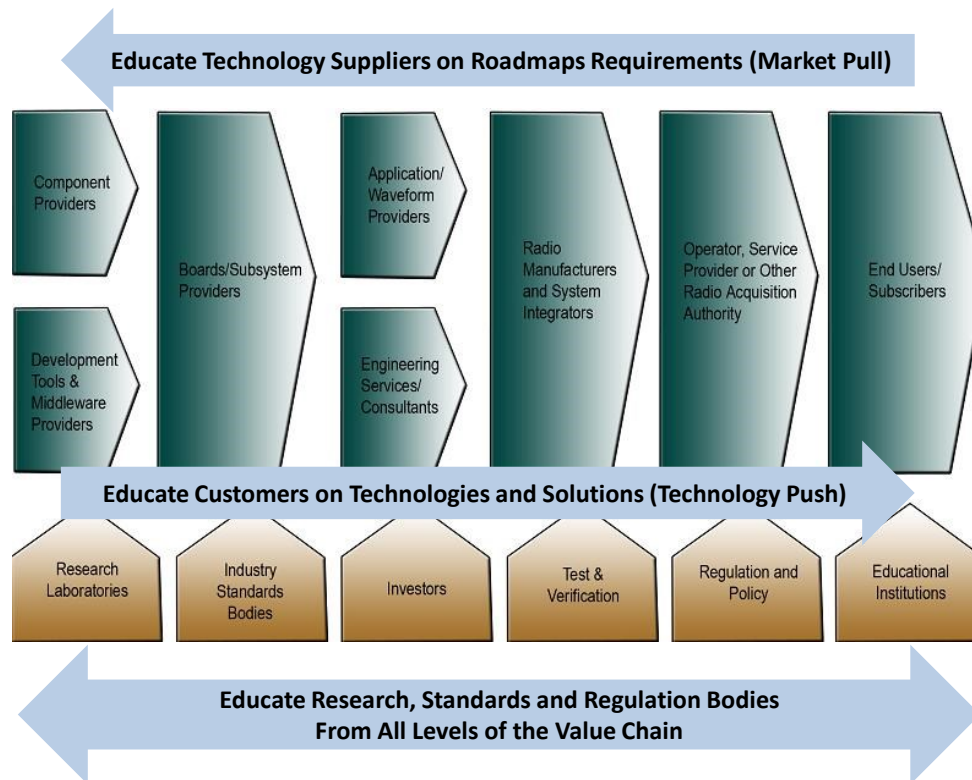
Figure 1: Driving Requirements Up and Down the Value Chain

In defining a strategy to support this renewed focus, the Forum's Executive Committee has defined multiple scenarios focusing on three key questions:

- Who are the Forum's active members, and what are they passionate about?
- At what can the Forum be the best in the world?
- What drives the Forum's economic engine, and how can the Forum measure success?

An output of this scenario planning was the revised mission statement highlighted in Table 2. This statement is consistent with the intent of the original but better focuses the mission of the Forum for the next several years. This revised strategic plan was crafted in support of this clarified mission.

Table 2: Revision of the Forum's Mission Statement

Current Mission Statement	Revised Mission Statement
The Forum is intended to comprise an international group of equipment vendors, subsystem vendors, software developers, technology developers, communication service providers, research and engineering organizations, academic institutions, government users, regulators and other interested parties who share the common business interest of supporting the advancement of a compatible modular technology base for multimode multiband information transfer systems and devices.	The Forum is intended to comprise an international group of equipment vendors, subsystem vendors, software developers, technology developers, communication service providers, research and engineering organizations, academic institutions, government users, regulators and other interested parties who share the common business interests of advocating for the innovative utilization of spectrum, and advancing radio technologies that support essential or critical communications.

3   High Level Strategy for the Wireless Innovation Forum

A graphic presenting the high level strategy for the Forum in supporting this mission is presented in Figure 2. The strategy leverages the broad base of experience and expertise of the Forum's member organizations in Software Defined, Cognitive Radio and Dynamic Spectrum Access technologies through three "pillars of strategy":

- **Advocacy** – The members of the Forum will collaborate with governments, regulators, standards bodies, and research sponsors acting as the voice of the wireless innovation community. In expanding its advocacy role, the Forum will take steps to ensure that it stays within the legal boundaries of what is allowed for a non-profit organization, and may evaluate spinning-off an affiliated organization should this be found too constraining.

- **Innovation** – The members of the Forum will work to proactively identify technical, business or regulatory innovations that are required to address emerging wireless communications requirements through improved performance of deliverables, reduced total life cost of ownership and the responsive and rapid deployment of standardized families of products, technologies, and services. Once identified, the Forum will work to foster research in these innovation areas, both within the Forum and in other partner bodies around the world.

- **Education** – The members of the Forum will educate the wireless research and development community and decision makers across the wireless value chain on software defined radio, cognitive radio and spectrum sharing technologies relevant in the creation of advanced wireless systems. Such education serves two purposes; it promotes the use of these technologies across a wider base of radio development programs and it lowers the costs inherent in these programs by reducing the technology learning curve.

- **Commercialization** – Through this pillar, the members of the Forum will facilitate the transition of advanced wireless technologies from the research labs into deployed systems. The Forum and its members will do this by promoting industry convergence on open specifications and standards supporting relevant technologies and by enabling certifications that promote interoperability.

Activities in each of these pillars are codependent in that effective advocacy requires an understanding of relevant technologies and areas required for innovation, driving innovation requires an understanding of the relevant technologies and advocating for research and development in defined areas, and education requires an understanding of areas required for innovation and the current views of decision makers in the advanced wireless market.

Through the pillars, the members of the Forum will strive to create opportunities for emerging wireless technologies and promote a proliferation of wireless platforms and devices that enhance interoperability while optimizing the use of spectrum, ultimately benefitting the end user with lower cost and expansion of service.
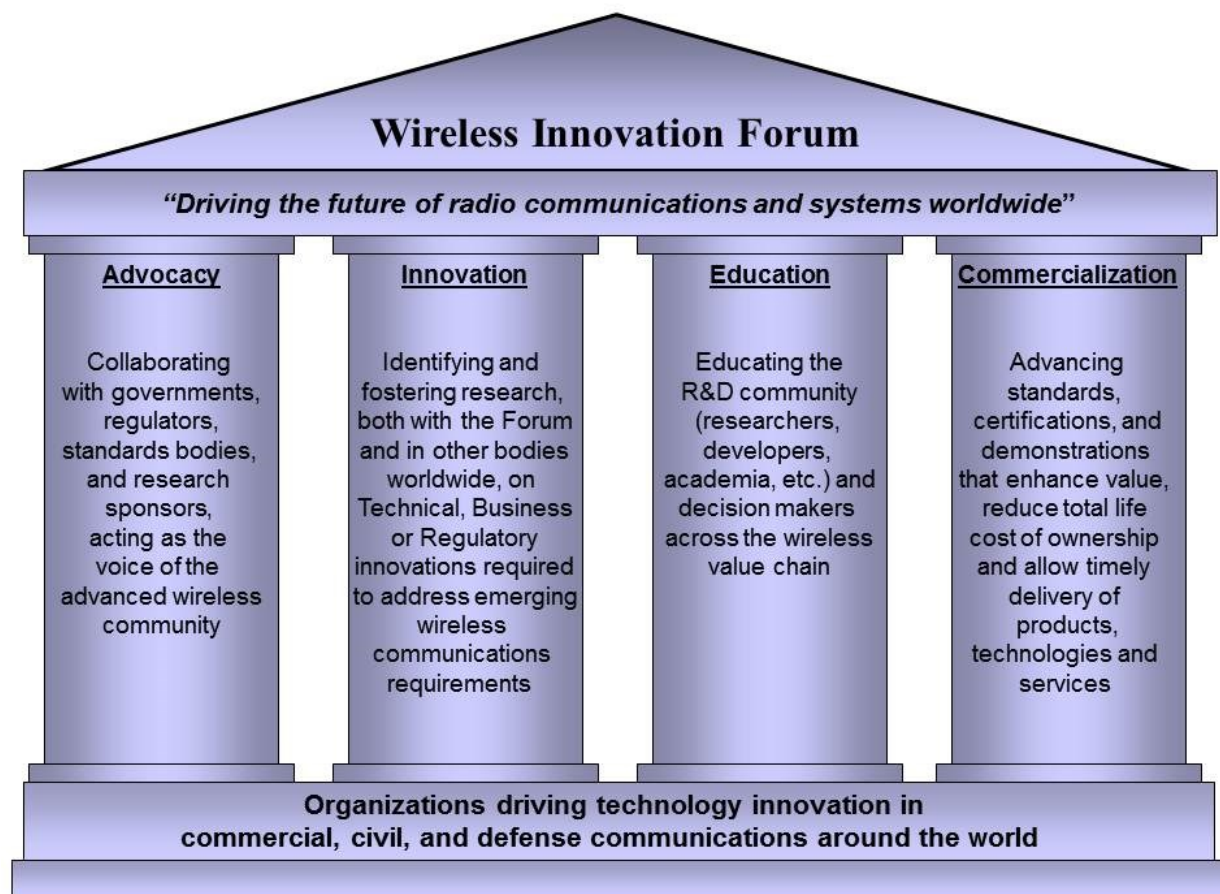

Figure 2: The Wireless Innovation Forum 2013 to 2017 Pillars of Strategy

4   Structure and Implementation

4.1 Spectrum Innovation Committee

Executing on this new strategy lies in reorganization of the Forum's Technical Committee on Software Defined Radio, Technical Committee on Cognitive Radio and Dynamic Spectrum Access, User Requirements Committee and Regulatory Committee into a single committee focused on advocating for member needs and fostering innovation. The name for this new committee will be the Spectrum Innovation Committee, which will be organized as follows.

4.1.1 Leadership

Leadership of the Spectrum Innovation Committee will come by combining the Project Approval Committee and Roadmap Committee into a single Steering Group. This group will report to the Forum's Board of Directors and will be comprised of the Forum's officers, with titles changed to reflect the change in Forum structure as shown in Table 3. The Chair of the Forum will act as the Chair of the Steering Group. The Chair of the Board of Directors shall also be a member of the Steering Group.

Table 3: Officer Titles

Current Title	New Title
Chair of the Forum, President of the Corporation	No Change
Vice Chair of the Forum, Vice President of the Corporation	No Change
Secretary	No Change
Treasurer, Chief Financial Officer	No Change
Technical Director	Chief Technical Officer
Chair of the User requirements Committee	Chief Marketing Officer
Chair of the Regulatory Committee	Chief Regulatory Officer
Chief Executive Officer	Chief Executive Officer

In addition to these voting members, the Chief Technical Officer, Chief Marketing Officer and Chief Regulatory Officer can nominate area or topic Sponsors to participate in the group as ex-officio non-voting members. The role of these sponsors is to advise the Steering group as subject matter experts for their area. It is anticipated that the initial group of sponsors will be as follows:

- Public Safety Sponsor
- Tactical Radio Sponsor
- Satellite Communications Sponsor
- SDR Sponsor
- CR/DSA Sponsor
- ITU Region 1 Regulatory Sponsor
- ITU Region 2 Regulatory Sponsor
- ITU Region 3 Regulatory Sponsor

A representative from each commercialization committee will also be invited to participate as an ex-officio non-voting member (See Section 4.2). In addition, the Steering group may constitute a group of advisors on an ad-hoc basis to support their objectives at any given time.

The Steering Group is largely an operational body similar to the Architecture Board that exists in other organizations. The group will be responsible for drafting the Forum's "Top 10 Most Wanted Wireless Innovations" list and setting the Forum's "Advocacy Agenda" based on member input. These documents will be distributed to the members of the Forum for ballot following the Forum's standard process[1], and once approved will drive the Forum's Project Roadmap (see Section 4.1.2). The Steering Group will also act as the project approval committee for projects occurring within the Spectrum Innovation Committee following the Forum's existing project approval process[2], and provide executive oversight of those projects.

4.1.2 Projects

A key to success for this new strategy is to have fewer groups working with groups focused on topics that are more industrially relevant and less "academic". Towards that end, under this new strategy the Spectrum Innovation Committee will support NO standing work groups, task groups or special interest groups. List servers will be maintained by Forum staff to allow collaboration in "communities of interest", and members will be encouraged to utilize these communities as required for online discussion. Committee ballot lists will also be maintained as required.
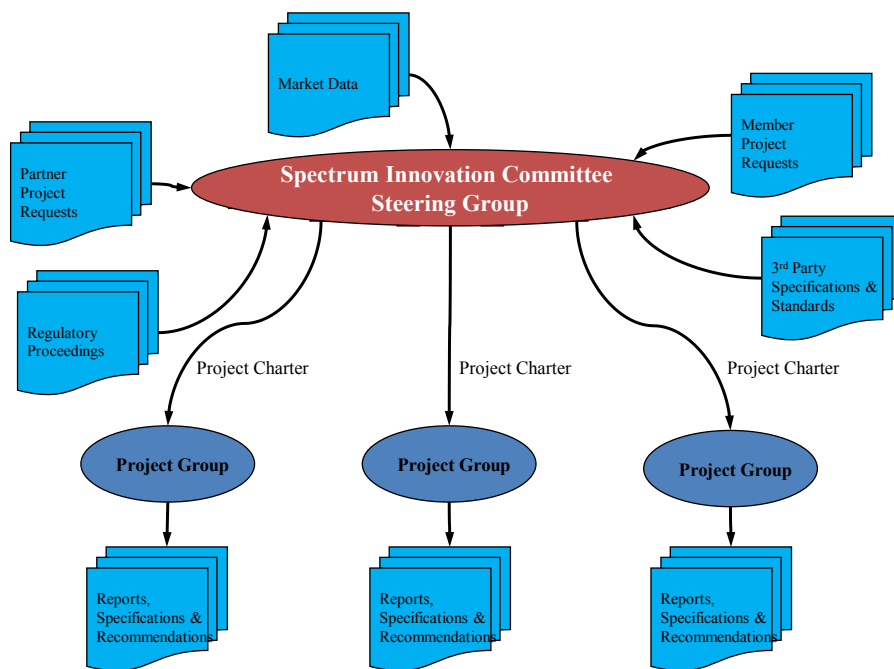
Table 4: Projects are approved by the Steering Group and executed on by Ad-Hoc project groups

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[1] http://www.wirelessinnovation.org/page/Document_Approval_Process
[2] http://www.wirelessinnovation.org/Project_Approval_Process

Projects within the Forum will then be formed on an ad-hoc basis as required by members to address an immediate need or by the steering group as roadmap projects to support the Forum's advocacy agenda or Top 10 Most Wanted Wireless Innovations list. To ensure relevance, approval of member driven projects moving forward will be contingent upon the project having a well-defined customer or advisory board and committed contributions. Project results will go to the Steering Group prior to release for ballot to ensure architectural consistency. To ensure project execution, additional staff support will be provided as shown in Table 5.

Table 5: Staff Support of Projects

Member Driven Projects	Roadmap Driven Projects
Champion defined project charter	Steering Group defines the project charter
Project submitted to Steering group for approval	Steering Group solicits for a volunteer project chair (Optional)
Staff supports champion in soliciting contributions	Staff solicits contributions
Staff supports Champion in managing the project as required, including fostering collaboration and editing to merge contributions into the final work product	Staff manages the project, maintaining schedule and budget, tracking progress and managing risk
Document submitted to Steering Group for review prior to release	Document submitted to Steering Group for review prior to release
Document is released to membership for ballot	Document is released to membership for ballot

4.2 Commercialization Committees

A key activity of the Spectrum Innovation Committee will be to help incubate advanced technologies supporting the Forum's members long term needs. As these technologies mature towards an advanced stage of commercialization, it is appropriate that member organizations interested in advancing the effective commercialization of products based on those technologies have additional autonomy in driving the commercialization process. When this occurs, a "Commercialization Committee" will be spun out and formed.

The goal of a commercialization committee is to help establish an ecosystem of vendors providing interoperable hardware and software radio components to drive the economies of scale that will ultimately reduce the costs of development, production and maintenance of wireless systems, while at the same time speeding time to market and time to deployment. They will achieve this goal through any number of ways, including:

- Solving the technical and business problems that burden the usability of the technologies, hindering the installation of the products based on those technologies, or represent a threat to the spread of these technologies and their affirmation in the marketplace.

- Promoting industry convergence on open specifications and standards supporting relevant technologies and by enabling certifications that promote the interoperability.

- Fostering research in related innovation areas, both within the Forum and in other partner bodies around the world.
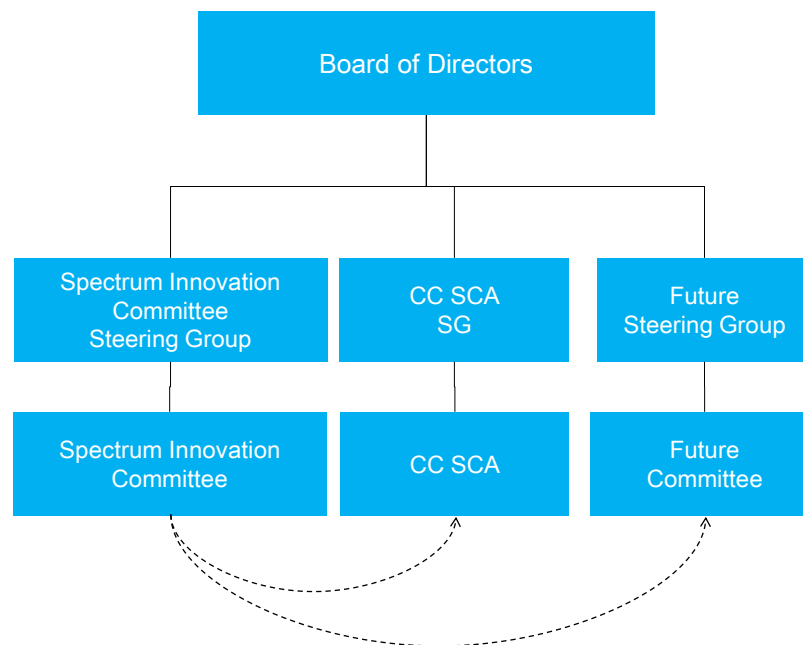
Figure 3: Technologies incubated in the Spectrum Innovation Committee will be spun off into Commercialization Committees once sufficiently mature.

The initial charter for each Commercialization Committee will be approved by the Board of Directors. General participation in a Commercialization Committee will be open to any member organization as per existing policy. The direction of the Committee will be driven by a "Steering Group", with participation in the "Steering Group" limited to those who pay a premium rate to be members. The Steering Group will manage the discretionary budget for the committee, own the committee project roadmap and have project approval authority on all related projects.

Commercialization Committees shall be accountable to the Board of Directors as would any committee within the Forum. The Chair of the Committee shall be selected by the processes defined for that committee and nominated to serve on the Board of Directors, representing the group to the Board of Directors, and representing the Board of Directors within the committee. Being on the committee does not preclude being on the Board in another capacity. Should a nomination from the floor result in some other member being chosen as the representative for that committee on the Board, the elected board member will serve on the committee steering group in an ex-officio capacity.

4.3 Structural Transition Summary

A summary of the structural changes defined in this new strategy are given in Table 6. The Coordinating Committee on International SCA Standards shall act as the first Commercialization Committee under this new strategy.

Table 6: Summary changes in Forum Structure under this new strategy

Current Committee Structure	Planned Committee Structure
Coordinating Committee on International SCA Standards	Coordinating Committee on International SCA Standards (no change)
User Requirements Committee	Combined "Spectrum Innovation Committee"
Regulatory Committee	
Technical Committee on SDR	
Technical Committee on CR and DSA	
Roadmap Committee	Spectrum Innovation Committee Steering Group
Project Approval Committee	

5 Meeting and Workshop Strategy

The Forum's Workshops and General Meetings provide a primary venue for executing on the Forum's pillars of strategy. Specific strategies for meetings and workshops are required, therefore, to ensure support of these pillars, which are summarized as follows:

- Forum meetings and conferences will be located in recognized wireless clusters or places with a high concentration of members. This strategy encourages local members and non-members to participate with low effort, maximizing the ability of our members to network and maximizing the ability of the Forum to reach out to potential new members and new markets.

- The Forum will no longer hold stand-alone General Meetings. General Meetings will be held, as appropriate, in conjunction with the Forum's workshops and conferences on a biannual basis. Interim Committee meetings will be held between general meetings at the discretion of the steering group. These committee meetings will be hosted, when possible, at member facilities, and efforts will be made to collocate meetings from multiple committees meetings occurring in the same quarter. Ad hoc face to face project meetings will also be held as required. Committee and ad-hoc meetings will be scheduled with sufficient notice to allow for proper identification of venues and travel planning.

- The Forum's online meeting and collaboration tools will provide the primary venue where work gets done in advancing Reports, Recommendations, and Specifications.

- The Forum will increase its use of ad-hoc in-person "workshops" as a primary vehicle for outreach within the advanced wireless community to advance the Forum's Advocacy Agenda. This includes exploring emerging requirements, collaborating to define solutions that address those requirements, educating the community and identifying new markets and new business opportunities for emerging technologies.

- The Forum will continue to use "virtual workshops" or webinars to explore specific technologies. These workshops may be tutorial in nature, providing instruction on the use of a state of the art technology, they may be used to create a new Report or Recommendation, or they may act as a vehicle for receiving primary input for an existing project.

6 Promoting the Advocacy Agenda and Top 10 List

Forum staff will work to actively promote the Forum's Advocacy Agenda, and will respond when appropriate to related news through news releases, blogs and social media outlets. Target turnaround time for a staff driven response will be twenty-four hours, and no additional member approvals will be required so long as the response only references approved materials.

Formal responses to requests in the form of a Notice of Inquiry, Request for Information or other consultation from a regulatory or other government agency will continue to follow the existing fast track model, with an ad-hoc project formed to craft the response which is then balloted by the members following standard process.

7 Standards Development Strategy

Successful operation of the Forum's Commercialization Committees will often require that the Forum facilitate the creation of standards and specifications that will reduce costs and time to market for SDR, CR and DSA based systems and products. However, in advancing this strategy, the Forum realizes that it is often not in the best interest of our members to develop such standards "in-house". Relevant specifications and standards may already exist in other organizations that may address the defined needs of the Forum's member organizations either "as is" or through minor modification. In addition, the broad base of technologies and disciplines required in developing and fielding reconfigurable radio technologies may mean that other standards organizations and consortia with expertise in a unique technology area may be better suited to develop a required specification or standard in that area. As such, the Forum and its members will adopt the following strategy for promoting standards that support the interests of the Forum's member organizations:

- **First, the Members will ENDORSE 3rd party "standards" when possible.** Endorsements will occur under relevant licensing terms to allow the Forum's members to leverage the work of other organizations to the greatest extent possible in supporting their specific needs.

- **The Members will PROFILE existing 3rd party "standards" when necessary.** As standards often incorporate a host of features and requirements that may not be relevant to the Forum's members in their entirety, the Forum will extract a subset of specifications under the appropriate licensing that are relevant to our Members' needs.

- **The Members will INFLUENCE other standards bodies as appropriate to support our member's needs.** This strategy establishes the Forum and its members as a customer for these organizations, allowing the Forum's members to focus on requirements, use cases, and business models and coordinate as necessary across multiple standards bodies.

- **The Members will DEVELOP their own specifications and standards when necessary.** The first choice of the Forum's members in this instance will be to modify or extend an existing standard if possible, but the Forum realizes it may need to develop its own specifications and standards to address the needs of its member organizations. As such, the Forum will retain its registration as a standards development organization

(SDO) and will work to mature its standards development processes to fully meet with the needs of its members.

8 Partnerships and Collaborations Strategy

Execution on this strategy obviously requires the Forum to maintain strong relationships with "partner" organizations, including end-user representatives, regulatory bodies, standards bodies and other industry consortia, to support the needs of our members. Such relationships may be formal through membership, memorandum of understanding or liaison agreement, or informal through joint participation and mutual interest. In advancing this strategy, the goal of the Forum is to collaborate, not compete, with partner organizations having overlapping interests, establishing the Forum as a single location where members can go to interact with a wide range of relevant third-party organizations. Where formal partnerships are required, Forum staff will work to establish the relationship, and then, where practical, member representatives will act as the liaison to the partner organization. Committee's may use discretionary budget to facilitate interaction with partner organizations as necessary, to include travel.
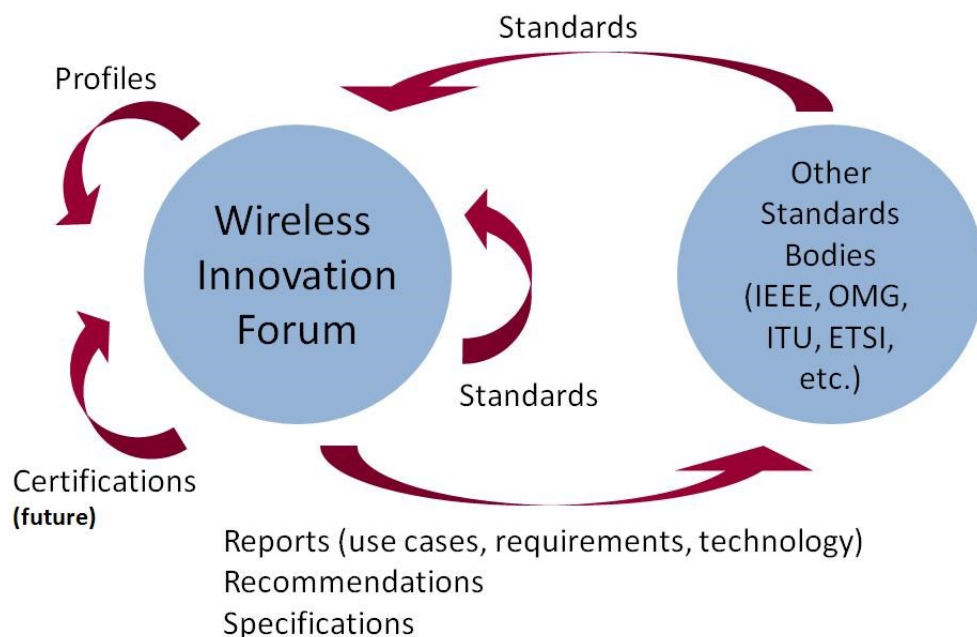

Figure 4: The Forum's Standards Collaboration Models

9 Strategy for Expansion and Growth

Long term growth requires the Forum to expand into adjacent markets, building economies of scale that span multiple market spaces and provide the Forum's members with access to new opportunities for their technologies, products and services. The Forum's strategy for expansion into these new domains will occur through three areas of activity:

1) Organic growth – the Forum will seek to grow organically into new market areas through ongoing projects and activities.

2) Research and Study Grants – the Forum will actively seek out sponsorships for roadmap projects. Secured funding will allow for larger projects requiring dedicated resources to achieve the required results.

3) Partnerships – the Forum will proactively work to bring under its umbrella other "start-up" associations involved in advancing relevant technologies. It is believed that such groups will gain value from the Forum's existing infrastructure, mature processes and procedures, member strength and experience as a 501(c)6 organization. These groups will be established as Commercialization Committees under the defined strategy, with their own steering group and the ability to maintain their own website and brand identity.

In executing on this strategy, the Forum will continue to avoid competing directly with existing trade associations supporting Tier 1 commercial markets, but instead will promote projects that complement their activities.

The success of this strategy requires international participation and therefore, the Forum's strategy for expansion and growth must include regional plans to reach out to and support members and potential members in Asia, Europe, and the Americas. Accordingly, the Forum will develop new mechanisms to support the regional needs of its member organizations around the world. Among the mechanisms that will be evaluated will be stronger partnering with existing regional groups, opening regional offices of the Forum staffed with personnel dedicated to growing participation in that region and supporting the specific needs of the local member organizations, chartering regional chapters of the Forum and supporting those chapters by holding local meetings focused on regional issues, and establishing regional workshops and conferences including specific areas of local interest.

10 Measuring Success

The Forum believes that execution of this plan will result in increased participation in the Forum's meetings and teleconferences, increased participation in the annual technical conference, and ultimately increased membership. In advancing this strategy, therefore, success will be measured by average member attendance at the General Meetings and at the Technical Conference.

11 Next Steps

The Forum realizes that for this strategic plan to succeed, it must evolve over time to best serve the needs of the Forum's member organizations. Toward that end, the Forum will move to a rolling model for evolving this baseline strategy moving forward. Under this model, Staff will present a list of strategic issues that must be evaluated to each committee's steering group on a monthly basis. Steering groups will maintain a radar screen of strategic issues and direct staff to collect additional data, as appropriate, for follow up. Actions will be generated based on this data,

and proposed changes in strategy will be briefed to the Board of directors on a quarterly basis for discussion and approval.