



2018 to 2022 Strategic Plan

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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 January 2018. 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.

Changes from the Previous Plan

Section 1 Strategic Planning Input and Process:

- Removed market / SWOT analysis

Section 2 Key Findings & Forum Positioning

- Added Key Differentiators
- Deleted “Key Issue Driving Forum’s Member Activities is Market Uncertainty”
- Deleted “Change Drivers and Scenario Planning”
- Added WInnForum Positioning Statement previously reviewed by BoD with some edits.

Section 3 High Level Strategy for the Wireless Innovation Forum

- Combined Innovation and Education pillars.
- Added Certification pillar

Section 4 Commercialization Framework (New Section)

- Pulled in the Elements of Forum’s “Commercialization Framework”

Section 5 Structure and Implementation

- 5.1 Advanced Technologies Committee – removed sponsors and changed to capability of constituting group of advisors on an ad-hoc basis
- 5.2 Commercialization Committees – edit of opening paragraph, deleting key activity of ATC is to incubate advance technologies

Section 6 Standards Development Strategy (moved earlier)

- Added “Lean Development Standards Model™” description

Section 7 Certification Development Strategy (NEW)

Section 8 Meeting and Event Strategy

- removed General Meetings
- Added strategy for “Conferences” with positioning statement previously approved by BoD
- general editing

Section 11 Strategy for Expansion and Growth

- Deleted Research and Study Grants
- Added branding and promoting the “Commercialization Framework”
- Partnerships – changed “proactively” to “opportunistically” bringing in under umbrella start-up Associations

2018 to 2022 Strategic Plan for The Software Defined Radio Forum Inc.
Doing Business as the Wireless Innovation Forum

Section 12 Measuring Success

- Changed General Meetings to Committee Working Meetings

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:
 - Membership Data – An analysis of the changes in the Forum’s membership from 2014 to 2017, including a first and second order evaluation of membership by size, region, primary market, and position in the value chain, and comparing historic members (2014 and before) versus newer members (2015 to 2017).
 - Meeting Data – An analysis of member and non-member attendance at Forum 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.
 - Finance – An analysis of the Forum’s financial results from 2014 to 2017, including an evaluation of any significant financial events that occurred.
 - 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
- Member Surveys – The Forum performed 2 surveys in support of the planning process:
 - New project initiation survey: This survey was used to identify the Forum's greatest assets and ways in which the Forum can capitalize upon them to establish new work groups, and incubate and grow projects in new areas that are important to the Forum’s member organizations.
 - General member survey: This survey was used to gain insights into what the Forum is doing well as an organization and where it needs to improve.
- Case studies – Case studies evaluating the successful initiation of the Spectrum Sharing Committee and the Software Defined Systems Committee (formerly Coordinating Committee on International Software Communications Architecture Standards) within the current strategy were performed, along with studies where new project initiation was not successful.
- 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 2014 to 2017 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 and Forum Positioning

2.1 Forum Successes and Key Differentiators

The environmental scan outlined above identified a number of areas where the Forum has been successful in executing on the 2013-2017 Strategic Plan. Key success factors identified in the environmental scan are as follows:

- 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 was especially important in establishing the Spectrum Sharing Committee, where the DoD is the incumbent in the CBRN band which has been opened to commercial use on a co-primary basis.
- 2) The Forum's membership model encourages participation by the entire value chain, bringing divergent views and competitors together on projects of broad mutual interest. This is facilitated by the "one organization, one vote model" which gives each group an equal say. The policies allowing subject matter experts, advisors and observers to participate without voting was also considered a key success factor.
- 3) The Forum's technology versus policy/lobbying focus was identified as being especially important, with the Forum's reputation as an "honest broker" in presenting technology to regulatory bodies highlighted by multiple members.
- 4) The Forum's openness to disruptive innovation and strategy of incubating new projects supporting these innovations in the Advanced Technologies Committee and then quickly spinning them off into new commercialization committees was validated in member interviews. A key element of this was allowing those who initiate something to maintain control at the project level, committee level and Board level ("people with skin in the game can control the process")

2.2 WInnForum Positioning Statement

In leveraging these successes, the Board of Directors has approved the following positioning statement for the Forum in supporting its mission moving forward:

For individuals striving to set their organization apart and achieve their market goals in their particular wireless industry, who need an ideal setting for incubating and advancing new, potentially disruptive technologies, specifications or guidelines, the Wireless Innovation Forum is a member driven, standards development organization that brings together groups of leading organizations from across multiple market segments around the world and at all levels of the wireless value chain to collaborate in advocating for the innovative use of spectrum and advancing radio technologies that support essential or critical communications worldwide.

Unlike other group collaboration organizations that are focused on lobbying for a specific segment of the wireless market, the Forum will act as an honest broker in advancing technologies supporting an ecosystem that spans multiple markets and brings member

organizations together with other thought leaders in a multi-stakeholder community to create highly recognized reports, recommendations, global specifications and standards.

Also unlike other standards bodies focused on supporting the wireless market, the Forum is agile, providing a venue for thought leaders to quickly build an ecosystem and rapidly advance reports, recommendations, global specifications and standards, certifications, etc. under a proven development model that can be tailored to your specific needs and under IPR terms aligned with Industry best practices.

3 High Level Strategy for the Wireless Innovation Forum

A graphic presenting the high-level strategy for the Forum in supporting this positioning is presented in Figure 1. The strategy leverages the broad base of experience and expertise of the Forum's member organizations in advanced wireless technologies through four "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 and Education** – 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 educate the community and foster research in these innovation areas, both within the Forum and in other partner bodies around the world.
- **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.
- **Certification** – Through this pillar, the members of the Forum will extend their commercialization mandate to ensure compliance with WinnForum specifications and standards. This includes facilitating the development of test specifications, fostering the development of test code and accrediting organizations to leverage these artifacts to designate products and services as "WinnForum Approved" where appropriate.

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.

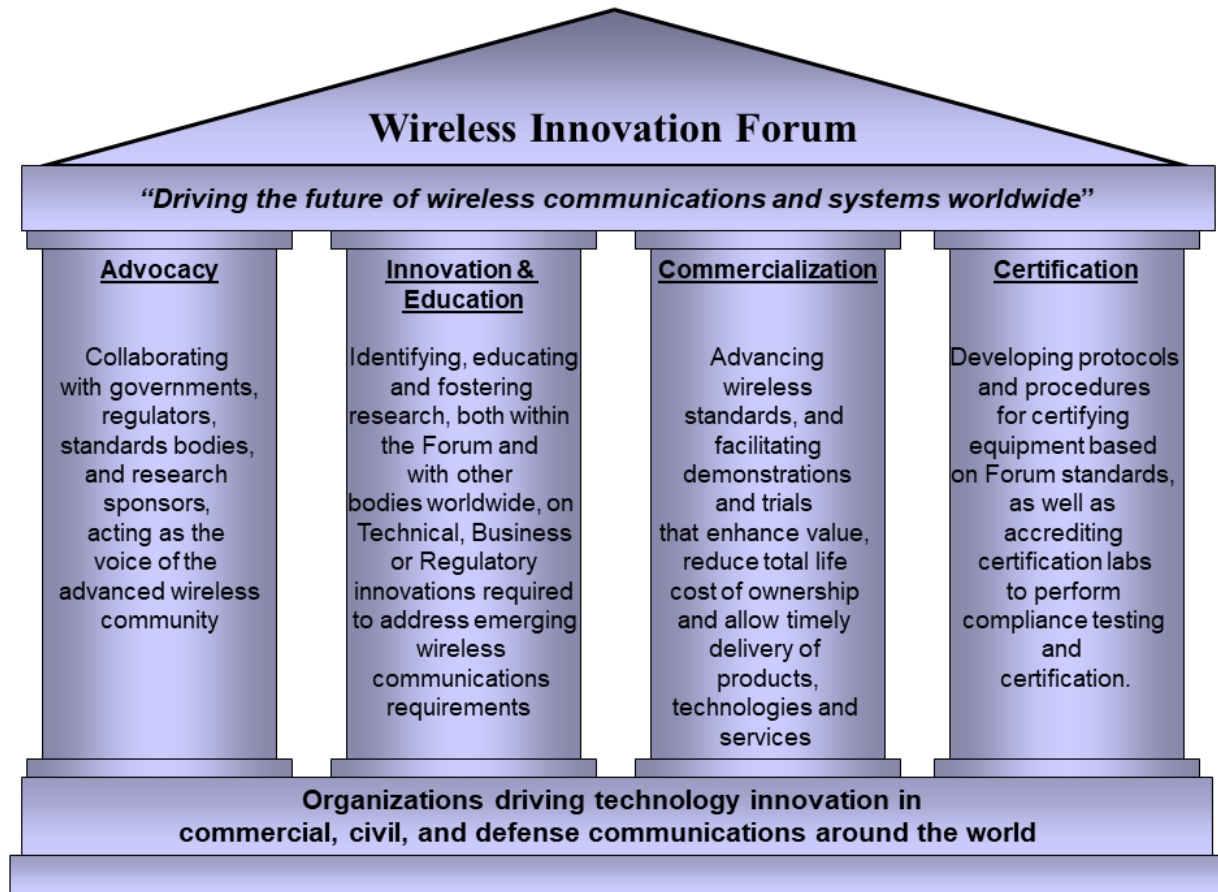


Figure 1: The Wireless Innovation Forum 2018 to 2022 Pillars of Strategy

4 Commercialization Framework

In support of these pillars of strategy, Forum leadership will work with staff to align Forum infrastructure, policies and procedures with a “commercialization framework”:

Table 1: Elements of The Forum’s “Commercialization Framework”

As a representative of a member organization, you can ...	Benefit/Value to the Member
Initiate and lead market focused work groups, task groups or special interest groups	to drive the creation of reports, recommendations and specifications that

	incubate and advance new technologies that are important to your organization.
Leverage the Forum’s proven development process and IPR policy	to rapidly advance projects that will get these innovative technologies to market.
Collaborate with other member representatives from leading organizations across multiple market segments and at all levels of the wireless value chain	to quickly build an ecosystem of organizations interested in gaining economies of scale in supporting these technologies through standards based interoperation.
Leverage the Forum’s flexible membership model	to expand this new ecosystem to include all relevant stakeholders.
Leverage the Forum’s reputation as a “honest broker” in presenting technology	to educate regulators on issues important to our organization in establishing this new ecosystem.
Leverage the Forum’s partnerships, US and European conferences, webinars and web presence	to promote the adoption of your ecosystem’s technologies, guidelines and standards.

5 Structure and Implementation

5.1 Advanced Technologies Committee

Primary Responsibility of the Innovation and Education Pillar defined within this plan will lie with the WinnForum’s Advanced Technologies Committee (ATC), which acts as an incubator for exploring potential new markets relevant to the Forum’s mission and in alignment with the Forum’s “Commercialization Framework”.

5.1.1 ATC Steering Group

The Steering Group of the Advanced Technologies Committee will report to the Forum’s Board of Directors and will be comprised of the Forum’s Officers (See Figure 2). 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.

In addition to these voting members, 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 responsible for updating the Forum’s “Top 10 Most Wanted Wireless Innovations” list and 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 process¹, and once approved will drive the Forum's Project Roadmap (see Section 5.1.2). The Steering Group will also act as the project approval committee for projects occurring within the Advanced Technologies Committee following the Forum's existing project approval process², and provide executive oversight of these projects.

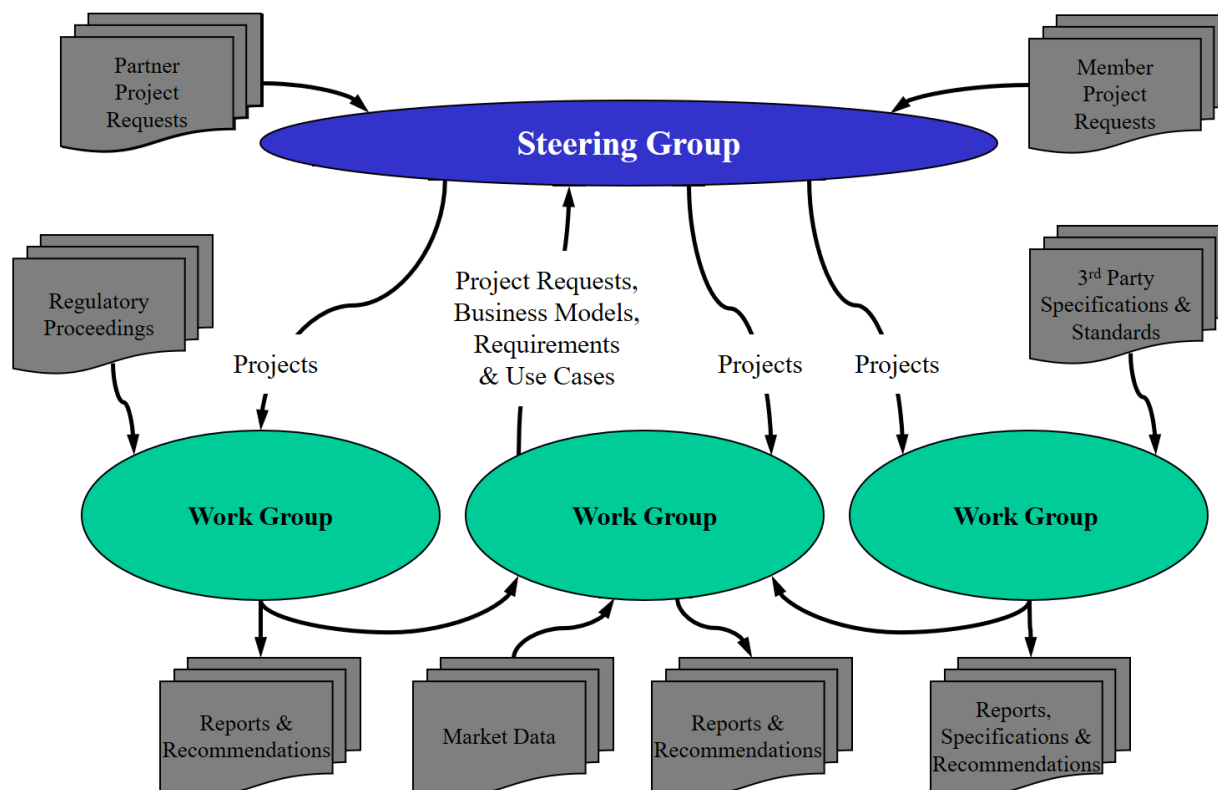


Figure 2: Advanced Technologies Committee Project Approval Process

5.1.2 Advanced Technologies Committee Projects

Projects within the Advanced Technologies Committee will 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 group 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 2.

¹ http://www.wirelessinnovation.org/page/Document_Approval_Process

² http://www.wirelessinnovation.org/Project_Approval_Process

Table 2: Staff Support of Projects

Member Driven Projects	Roadmap Driven Projects
Champion defines 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 (or volunteer project chair) 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

5.2 Commercialization Committees

As technologies incubated within the Advanced Technologies Committee mature towards a more advanced stage, 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 (See Figure 3).

The goal of a commercialization committee is to help establish an ecosystem of vendors providing interoperable hardware and software 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.

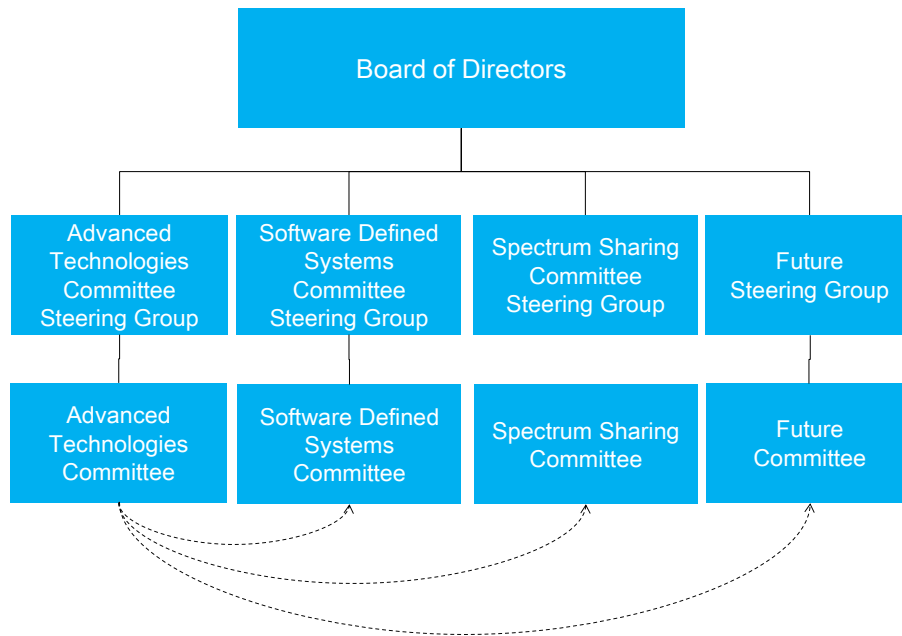


Figure 3: Technologies incubated in the Advanced Technologies Committee will be spun off into Commercialization Committees once sufficiently mature.

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 are all committees 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.

6 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 facilitate interoperability, reduce costs and reduce time to market in establishing and growing an ecosystem for advanced wireless based systems and products. Building on past successes and in alignment with the

Forum's Commercialization Framework, the Forum shall adopt a "Lean Standards Development Model™" as follows:

- Committee roadmap sets requirements at a high level, and establishes a prioritized "backlog" of work to be done
- Backlog items are assigned to a "sprint"
 - Detailed requirements defined
 - Protocols developed
 - Test and certification established
- Results of sprint delivered in an Interim Release
- Continual Feedback from deployment against Interim Releases establishes new backlog items
- Major release comprised of one or more interim releases

Forum leadership will work with staff to evolve this model to maximize efficiency without loss of rigor, allowing standards to be developed in months, not years.

In some cases, 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 advanced wireless 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. In such cases, the Forum and its members will adopt the following strategy for promoting standards that support the interests of the Forum's member organizations:

- **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.

7 Certification Development Strategy

In supporting the Certification Pillar of the High Level Strategy, commercialization committees analyze the needs from programs, program offices and other development activities occurring in the WINnForum and worldwide to determine the feasibility of value added evaluation and/or

certification services that the WInnForum can provide. Appropriate initiatives and projects within the scope of the commercialization committee charters will be developed as these opportunities are realized.

The strategy adopted by the Forum will be to not perform certification testing directly, but rather we will accredit other organizations to perform and issue certifications against WInnForum Standards. This includes accrediting both test labs and the “Test Programs” of other “Trade Associations”. Service mark agreements will be provided so that accredited entities can claim “WInnForum Approved™” as appropriate. Fees may be charged by the Forum for accreditation services as required to offset expenses, but such fees may be waived for WInnForum members.

8 Meeting and Event Strategy

The Forum’s meetings, workshops, and conferences provide a primary venue for executing on the Forum’s pillars of strategy. Specific strategies for meetings and events 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.
- Working meetings for each Commercialization Committee will be held 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 Commercialization Committees 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, Specifications and Standards.
- The Forum will move away from having a regular annual Forum-wide European conference to a model of Ad hoc regional workshops driven by the needs of each commercialization committee, with the three committees coming together in a common annual US event. These Committee led ad-hoc in-person “workshops” will act as a primary vehicle for outreach within the advanced wireless community. 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.

- The Annual US “Conferences” will move from an academic paper base to an industry led presentation base with focused parallel workshops. Content will be driven, by and large, by the three committees through an appointed track chair from each committee supporting the following positioning statement approved by the Board in March of 2017

FOR academics, researchers, technology providers, equipment manufacturers, system integrators, their customers, and government authorities,

WHO seek to facilitate the development and adoption of technologies and standards supporting the innovative utilization of spectrum and the development of wireless communications systems.

WInnComm IS THE event

THAT provides a venue for facilitating discussion between stakeholders to establish or expand emerging ecosystems in the wireless communications market, define and promote interoperability standards supporting those ecosystems, and educate regulators on associated issues.

UNLIKE other conferences that have a more academic or large system trade show focus,

WInnComm is focused on information exchanges between stakeholders to report and discuss the development, adoption, transfer and commercialization of technologies, standards, regulations and certification processes, and demonstrating new technologies that enhance value, reduce total life cost of ownership and allow timely delivery of products and services.

Support for this strategy may come from the exploration of special topics defined by each committee.

9 Promoting the Advocacy Agenda and Top 10 List

Forum staff will continue to 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.

10 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.

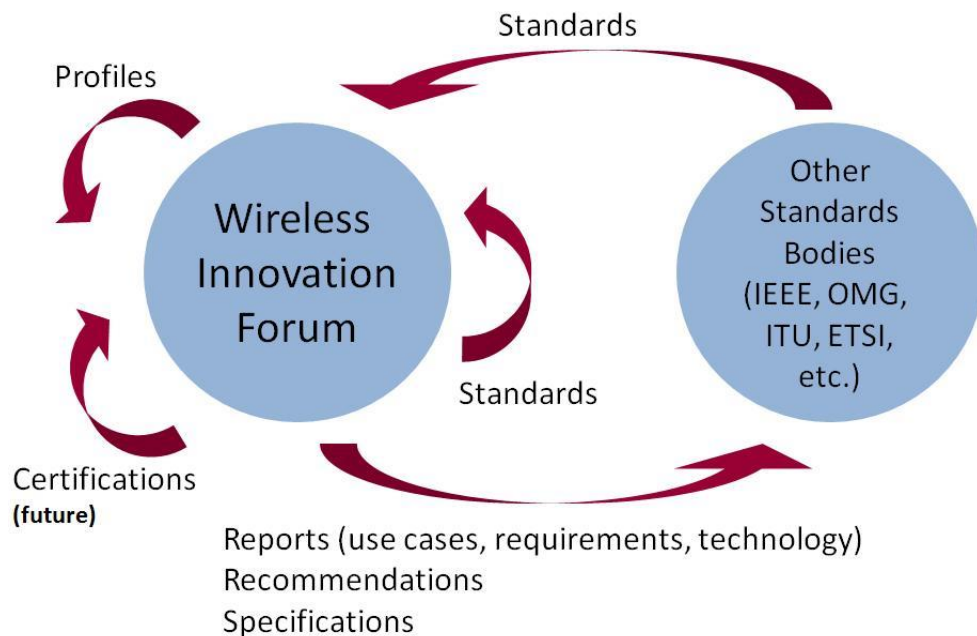


Figure 4: The Forum's Standards Collaboration Models

11 Strategy for Expansion and Growth

Long term growth requires the Forum to expand into adjacent markets worldwide, 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 projects created out of the Advanced Technologies Committee and activities in existing Commercialization Committees.
- 2) Work to brand the Forum’s “Commercialization Framework” and promote throughout the community to attract new projects within the Advanced Technologies Committee that can lead to new commercialization committees.
- 3) Partnerships – the Forum will opportunistically 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.

12 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 WInnComm, and ultimately increased membership. In advancing this strategy, therefore, success will be measured by average member attendance at the teleconferences, Committee working meetings and workshops, and at WInnComm. An abrupt change in any of these metrics will be reported to the Board of Directors and appropriate action taken.

True growth should also be recognized with the creation of a new Commercialization Committee within the timeline covered by this Strategic Plan.

13 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

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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.