



September 25th 2023 Executive Committee

Meeting Minutes

September 25th, 2023

2:00-3:00 PM ET

1. Opening

Brian Nerland called the meeting to order at 2:00 pm ET. A quorum was established.

Members Present: Brian Nerland, Janet Good, Betsy Burgos, Kailey Medlock, Sarah Goldman

Staff Present: Eric Reed. Megan Atkinson

Members of the Public: None

2. Approval of Agenda

No comments were made. No modifications were made. Ms. Goldman made the motion to approve the agenda as presented. Ms. Goldman seconded the motion. The agenda was approved.

3. Approval of the Minutes

No comments were made. No modifications were made. Ms. Medlock made the motion to approve the August 28th, 2023 Executive committee meeting minutes as presented. Dr. Burgos seconded the motion. The minutes were approved.

4. Financial Statement Review

Ms. Medlock explains that she will present the financials differently by highlighting the documents that the committee has also seen. She would like to know what trends they would like to see. Mr. Nerland would like to see yearly trends. Ms. Good suggested looking at categories that provide useful information, such as fundraising and AT purchasing trends, not just providing additional information that is not useful. The Device loan invoices will be removed by the accountant. They are all over 90 days old and the items have depreciated. We haven't used quickbooks to invoice DL clients in some time and this was not initially done as a financial accounting measure but as a way to produce an invoice to try and recover assistive technology. Ms. Good made a motion to remove the aging items that



involve the device loan program from the Aging Report. Dr. Burgos seconded and commented that a better plan should be created for the loan program collection activities. A voice vote was taken and the motion passed unanimously. Dr. Burgos motioned to accept the August financials. Ms. Goldman seconded the motion and the financials were accepted unanimously.

5. Strategic Plan Development Planning

Mr. Reed gave a brief overview of meetings he has had with Mark Bennett regarding the roll out of the strategic planning process with tentative dates and schedule. Mr. Bennett joined the call and led a discussion regarding what he thinks a best practice of setting the meeting schedule and times would be. The committee decided that two hour meetings would be the best for the overall ATAC, following a 3-hour meeting to kickoff the process. Mr. Bennett agrees that this plan would work and he has followed similar schedules for other groups. The committee agreed to alternate the time of meetings from morning to afternoon but keep the day of the week the same, starting on Oct 26th at 9:00 am.

6. ATAC Committee Assignments

Mr. Reed presented the proposed committee assignments. Mr. Nerland and Ms. Medlock had concerns that the Technology Awareness Committee was predominantly a new committee. Mr. Nerland and Ms. Medlock both agreed to remain on that committee. Mr. Reed informed the committee that he would be leaving the meeting in a few minutes and Ms. Atkinson would take over as staff liaison. Ms. Medlock was also leaving the meeting due to another meeting scheduled. Ms. Good pointed out that all of the committees had a member of the Executive Committee with the exception of NHLP. Dr. Burgos agreed to become a member of that committee. Mr. Nerland stated that committee chairs have not been finalized but he does not intend to make changes where not necessary. The committee had a brief discussion about creating officer term limits within the already created ATAC member term limits but this was tabled for future discussion.

7. VR Contract Updates

There were no updates provided

8. Closing

Next Meeting-October 23rd, 2023, 2:00-3:00. No public comment was made. The meeting was adjourned at 3:10 pm.

Florida Alliance for Assistive Services and Technology, Inc.

Balance Sheet

As of September 30, 2023

	TOTAL
ASSETS	
Current Assets	
Bank Accounts	
1000 Cash - Unrestricted	
1012 First Fed 4192 - FFAST Operating	-73,813.44
1025 Capital City - Board Designated Operating Reserve	31,936.00
Total 1000 Cash - Unrestricted	-41,877.44
1001 Cash - Restricted	
1047 First Fed 7286 - NHLP Operating	17,350.26
1048 First Fed 7294 - TW-DL	67,832.83
1049 First Fed 7302 - AFP-DL	72,298.93
1053 First Fed 7310 - Reserve Acct	132,588.97
1055 First Fed 4184 - CBA	2,005.00
Total 1001 Cash - Restricted	292,075.99
Suspense	5,117.30
Total Bank Accounts	\$255,315.85
Accounts Receivable	
1100 Accounts Receivable - Unrestr.	19,335.75
Total Accounts Receivable	\$19,335.75
Other Current Assets	
1120 Interfund	0.00
1200 Prepaid expense - Unrestric.	15,447.66
12000 Undeposited Funds	1,130.62
7055 AFP Direct Loans	548,677.35
7056 TW Direct Loans	125,164.20
7056.5 Credit Builders Alliance Loan	0.00
7061 Credit Builder Loan	0.00
Allowance for Doubtful Accounts	5,750.23
Fraud	16,650.10
Total Other Current Assets	\$712,820.16
Total Current Assets	\$987,471.76
Fixed Assets	
1500 Furniture & Fixtures	176,427.36
1550 Accumulated Depreciation	-119,806.00
1555 Accumulated Amortization	-54,000.00
Total Fixed Assets	\$2,621.36
Other Assets	
1600 TD Ameritrade	
1605 AFP	
1610 TD Ameritrade AFP	1,348,074.25
1611 AFP Market Value Adjustment	470,606.62

Florida Alliance for Assistive Services and Technology, Inc.

Balance Sheet

As of September 30, 2023

	TOTAL
Total 1605 AFP	1,818,680.87
1615 Unrestricted	
1620 TD Ameritrade Board Operating Reserve	250,242.64
1621 Unrestricted Market Value Adj	45,379.77
Total 1615 Unrestricted	295,622.41
1625 Telework	
1630 TD Ameritrade TW	245,663.08
1631 TW Market Value Adjustment	176,368.40
Total 1625 Telework	422,031.48
Total 1600 TD Ameritrade	2,536,334.76
1650 Deposits	4,500.00
Total Other Assets	\$2,540,834.76
TOTAL ASSETS	\$3,530,927.88
LIABILITIES AND EQUITY	
Liabilities	
Current Liabilities	
Accounts Payable	
2010 Accounts Payable	2,426.08
Total Accounts Payable	\$2,426.08
Credit Cards	
2006 First Federal Company Credit Cards	0.00
2007 First Fed CC - Whitney	0.00
2008 First Fed CC - Eric	-504.08
2012 First Fed CC - Hannah	0.00
2013 First Fed CC - Tim	0.00
2014 First Fed CC - Marquesas	0.00
Total 2006 First Federal Company Credit Cards	-504.08
Total Credit Cards	\$ -504.08
Other Current Liabilities	
2020 SS, Med and Fed W/H Tax Payable	0.00
2030 Employee Deductions Payable	0.00
2040 403-b Employee Ded. Payable	9.05
2050 Accrued Leave Payable	21,556.12
2060 FL Unemployment Taxes Payable	0.00
Deferred Revenue	0.00
Total Other Current Liabilities	\$21,565.17
Total Current Liabilities	\$23,487.17
Total Liabilities	\$23,487.17

Florida Alliance for Assistive Services and Technology, Inc.

Balance Sheet

As of September 30, 2023

		TOTAL
Equity		
3010 Unrestricted Net Assets		327,558.41
3020 Restricted Net Assets		2,911,458.44
Net Income		268,423.86
Total Equity		\$3,507,440.71
TOTAL LIABILITIES AND EQUITY		\$3,530,927.88

Florida Alliance for Assistive Services and Technology, Inc.
Budget vs. Actuals: 2022-2023 Fiscal Budget - FY23 P&L Classes
October 2022 - September 2023

	TOTAL			% of
	Actual	Budget	over Budget	Budget
Income				
4001 HHS Grant-Voc Rehab	725,637.39	838,291.00	-112,653.61	86.56%
4002 Florida General Revenue	465,450.86	750,000.00	-284,549.14	62.06%
4006 Revenue from Step Up Grant	92,262.79	65,774.39	26,488.40	140.27%
4007 Donations	1,342.38	0.00	1,342.38	
4007.2 Unrestricted Donations	0.00	0.00	0.00	
4007.12 Board - Monthly Donations	0.00	500.00	-500.00	0.00%
4007.3 Amazon Smile Donations	60.85	25.00	35.85	243.40%
4007.5 Staff - Monthly Donations	0.00	500.00	-500.00	0.00%
4007.7 Miscellaneous Donation	0.00	5,000.00	-5,000.00	0.00%
Total 4007.2 Unrestricted Donations	\$ 60.85	\$ 6,025.00	-\$ 5,964.15	1.01%
Total 4007 Donations	\$ 1,403.23	\$ 6,025.00	-\$ 4,621.77	23.29%
4019 Investments	0.00	0.00	0.00	
4020 Unrealized Gains/Losses	194,855.30	0.00	194,855.30	
4022 Interest Income	920.19	85.00	835.19	1082.58%
4023 Interest Income on Direct Loans	26,165.13	25,469.71	695.42	102.73%
4026 Dividend Income from Investments	72,342.22	0.00	72,342.22	
Total 4019 Investments	\$ 294,282.84	\$ 25,554.71	\$ 268,728.13	1151.58%
4027 Miscellaneous Income	57,999.01	80,000.00	-22,000.99	72.50%
4037 Grant Income	676,343.00	676,343.00	0.00	100.00%
Total Income	\$ 2,313,379.12	\$ 2,441,988.10	-\$ 128,608.98	94.73%
Gross Profit	\$ 2,313,379.12	\$ 2,441,988.10	-\$ 128,608.98	94.73%
Expenses				
5075 State Level Activites	0.00	0.00	0.00	
5100 Device Loan	0.00	0.00	0.00	
5019 Assistive Technology	216,126.82	176,821.46	39,305.36	122.23%
5020 Shipping for AT Loan Equipment	4,340.81	6,000.00	-1,659.19	72.35%
7027 Device Loan Activities	307,167.42	303,564.88	3,602.54	101.19%
Total 5100 Device Loan	\$ 527,635.05	\$ 486,386.34	\$ 41,248.71	108.48%
5150 Device Demonstration	0.00	0.00	0.00	
5151 Device Demo Activities	153,583.44	151,782.44	1,801.00	101.19%
Total 5150 Device Demonstration	\$ 153,583.44	\$ 151,782.44	\$ 1,801.00	101.19%
5700 ReUse	0.00	0.00	0.00	
5076 Device Exchange Activities	18,000.00	20,000.00	-2,000.00	90.00%
5077 Device Refurbish Activities	76,202.09	85,000.00	-8,797.91	89.65%
Total 5700 ReUse	\$ 94,202.09	\$ 105,000.00	-\$ 10,797.91	89.72%
6000 State Financing	0.00	0.00	0.00	
5008.02 Contract Services NHLP	17,856.00	9,516.52	8,339.48	187.63%
5011 Credit Reports	1,981.51	834.11	1,147.40	237.56%
5026.1 NHLP Shipping	616.49	571.50	44.99	107.87%
5061 Investment Services	16,479.54	0.00	16,479.54	
5071 NHLP Travel	2,002.12	6,434.50	-4,432.38	31.12%

7050 Telework Bank Charges	10.00	0.00	10.00	
7052 AFP Bank Charges	40.00	0.00	40.00	
7058 NHLP Legal Fees	1,520.00	8,000.00	-6,480.00	19.00%
7080 NHLP Doc Stamps	568.31	0.00	568.31	
Total 6000 State Financing	\$ 41,073.97	\$ 25,356.63	\$ 15,717.34	161.99%
6050 State Level Activities Personnel	0.00	0.00	0.00	
6010 Salary	105,342.71	149,661.16	-44,318.45	70.39%
6011 SEP Retirement	7,307.91	10,476.28	-3,168.37	69.76%
6012 Payroll Tax	9,399.49	11,972.89	-2,573.40	78.51%
6013 Employee Insurance	11,377.15	15,709.39	-4,332.24	72.42%
6014 Workers Comp	1,411.38	2,213.78	-802.40	63.75%
Total 6050 State Level Activities Personnel	\$ 134,838.64	\$ 190,033.50	-\$ 55,194.86	70.96%
Total 5075 State Level Activities	\$ 951,333.19	\$ 958,558.91	-\$ 7,225.72	99.25%
5175 State Leadership Activities	0.00	0.00	0.00	
5180 Trainings	0.00	0.00	0.00	
5008.01 GRANT Multimedia Consulting Fee	63,067.42	50,625.00	12,442.42	124.58%
5181 Training Activities	286,639.19	279,866.42	6,772.77	102.42%
5182 Transition Training Activities	13,054.62	16,765.82	-3,711.20	77.86%
Total 5180 Trainings	\$ 362,761.23	\$ 347,257.24	\$ 15,503.99	104.46%
5185 Information and Assistance	0.00	0.00	0.00	
5185.1 Information and Assistance Activities	46,075.07	84,136.82	-38,061.75	54.76%
Total 5185 Information and Assistance	\$ 46,075.07	\$ 84,136.82	-\$ 38,061.75	54.76%
5190 Public Awareness	38,601.14	0.00	38,601.14	
5036 Public Awareness Materials	5,557.95	6,100.00	-542.05	91.11%
5036.1 Registration and Exhibit Fees	15,550.00	4,255.20	11,294.80	365.44%
5051 Website Modifications	0.00	1,078.85	-1,078.85	0.00%
5056 Public Awareness Travel	10,709.04	8,242.00	2,467.04	129.93%
5060 RDC Travel	12,845.46	37,716.00	-24,870.54	34.06%
7003 FFAST Van	706.70	1,000.00	-293.30	70.67%
Total 5190 Public Awareness	\$ 83,970.29	\$ 58,392.05	\$ 25,578.24	143.80%
5191 Public Awareness - The Annual Family Cafe	158.89	0.00	158.89	
5194 Public Awareness Travel	2,987.52	1,998.00	989.52	149.53%
5196 Contracted Services	4,900.00	3,900.00	1,000.00	125.64%
Total 5191 Public Awareness - The Annual Family Cafe	\$ 8,046.41	\$ 5,898.00	\$ 2,148.41	136.43%
5198 Technical Assistance	0.00	0.00	0.00	
5003 Contract Activities	613.25	500.00	113.25	122.65%
5026.2 BOD - Shipping	15.78	34.75	-18.97	45.41%
5028 Insurance - Dir and Officers	642.58	710.00	-67.42	90.50%
5037 BOD Travel	11,059.41	18,768.00	-7,708.59	58.93%
5040 BOD - Professional Development	376.20	0.00	376.20	
5065 Contract Monitoring	3,424.42	5,395.00	-1,970.58	63.47%
5070 Executive Director Travel	2,725.88	4,382.00	-1,656.12	62.21%
Total 5198 Technical Assistance	\$ 18,857.52	\$ 29,789.75	-\$ 10,932.23	63.30%
6060 State Leadership Activities Personnel	0.00	0.00	0.00	
6015 Salary	129,653.66	105,081.24	24,572.42	123.38%
6016 SEP Retirement	9,099.17	7,355.69	1,743.48	123.70%
6017 Payroll Tax	10,049.63	8,406.50	1,643.13	119.55%
6018 Employee Insurance	13,924.53	11,029.99	2,894.54	126.24%
6019 Workers Comp	1,698.76	2,204.51	-505.75	77.06%

Total 6060 State Leadership Activities Personnel	\$ 164,425.75	\$ 134,077.93	\$ 30,347.82	122.63%
Total 5175 State Leadership Activities	\$ 684,136.27	\$ 659,551.79	\$ 24,584.48	103.73%
5250 Operational Expense	0.00	0.00	0.00	
5000 Contractual Expense	0.00	0.00	0.00	
5008 Contracted Services	180,267.13	174,683.43	5,583.70	103.20%
Total 5000 Contractual Expense	\$ 180,267.13	\$ 174,683.43	\$ 5,583.70	103.20%
5005 Equipment Expense	0.00	0.00	0.00	
5014 Equipment - Under \$500	2,867.60	499.69	2,367.91	573.88%
5015 Equipment - Over \$500	10,987.52	2,498.44	8,489.08	439.78%
Total 5005 Equipment Expense	\$ 13,855.12	\$ 2,998.13	\$ 10,856.99	462.13%
5021 Office Supplies	3,434.43	4,198.89	-764.46	81.79%
5022 Rent	54,000.00	53,966.25	33.75	100.06%
5026 Postage/Shipping	2,131.86	719.55	1,412.31	296.28%
5029 Insurance - General/Office Liab	15,106.60	8,838.59	6,268.01	170.92%
5030 Legal	438.00	3,547.78	-3,109.78	12.35%
5031 Membership Fees	10,315.00	20,461.45	-10,146.45	50.41%
5032 Banking Fees - Operations	718.32	19.99	698.33	3593.40%
5033 Corporate Fees	195.25	144.91	50.34	134.74%
5041 Local Travel	209.23	199.89	9.34	104.67%
5053 Utilities	11,294.31	10,152.49	1,141.82	111.25%
5252 Professional Development	1,541.80	1,194.25	347.55	129.10%
5253 Professional Development - Travel	0.00	3,537.79	-3,537.79	0.00%
5254 Payroll Service Fees	1,804.82	1,402.60	402.22	128.68%
5300 Operations Personnel	0.00	0.00	0.00	
6001 Salary	96,622.77	145,028.90	-48,406.13	66.62%
6002 SEP Retirement	6,150.25	8,052.03	-1,901.78	76.38%
6003 Payroll Tax expense	7,633.08	11,429.43	-3,796.35	66.78%
6004 Employee Insurance	2,749.71	3,392.30	-642.59	81.06%
6006 Insurance - Workers Comp	1,018.12	1,633.85	-615.73	62.31%
Total 5300 Operations Personnel	\$ 114,173.93	\$ 169,536.51	-\$ 55,362.58	67.34%
Total 5250 Operational Expense	\$ 409,485.80	\$ 455,602.50	-\$ 46,116.70	89.88%
Reimbursable Expenses	0.00	0.00	0.00	
Total Expenses	\$ 2,044,955.26	\$ 2,073,713.20	-\$ 28,757.94	98.61%
Net Operating Income	\$ 268,423.86	\$ 368,274.90	-\$ 99,851.04	72.89%
Net Income	\$ 268,423.86	\$ 368,274.90	-\$ 99,851.04	72.89%

Tuesday, Oct 17, 2023 02:27:59 PM GMT-7 - Accrual Basis

Florida Alliance for Assistive Services and Technology, Inc.

A/R Aging Summary

As of September 30, 2023

	CURRENT	1 - 30	31 - 60	61 - 90	91 AND OVER	TOTAL
University of Miami-FAAST	917.48		762.42	17,655.85		\$19,335.75
TOTAL	\$917.48	\$0.00	\$762.42	\$17,655.85	\$0.00	\$19,335.75



Schwab One® Account of

FLORIDA ALLIANCE FOR ASSISTIVE

Account Number
8098-0623

Statement Period
September 1-30, 2023

Account Summary

Ending Account Value
as of 09/30

\$1,818,680.87

This Statement

Beginning Value	\$0.00
Deposits	19,868.09
Withdrawals	0.00
Dividends and Interest	14,397.72
Transfer of Securities(In/Out)	1,844,321.02
Market Value Change	(59,905.96)
Fees	0.00
Ending Value	\$1,818,680.87

Your Independent Investment Manager and/or Advisor

SMITH BRUER ADVISORS LLC
1700 SUMMIT LAKE DR
STE 102
TALLAHASSEE FL 32317
1 (800) 387-3487

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Charles Schwab & Co., Inc. Your independent
Investment Advisor is not affiliated with or an
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or endorse your Advisor.

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and benefits of this statement.

FLORIDA ALLIANCE FOR ASSISTIVE
2145 DELTA BLVD STE 200
TALLAHASSEE FL 32303-4244



A Message About Your Account

Bank Sweep Feature During Transition.

This account statement reflects transactions associated with transitioning your brokerage account from TD Ameritrade to Charles Schwab & Co., Inc. (Schwab). Specifically, this statement reflects an initial deposit of your cash at Schwab before being swept to the applicable Program Bank(s) in Schwab’s Bank Sweep Feature. In fact, your cash remained at the Program Bank(s) during this time period and remained eligible for FDIC Insurance coverage up to the applicable limits throughout the transition process.

Please also note: Your new Schwab statement was designed to help you find your account and investment information quickly. Please visit schwab.com/statement to view our How-to Guide, which will walk you through the features on your new statement. (1023-3UCK)

Positions - Summary

Beginning Value as of 09/01	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	Ending Value as of 09/30
\$0.00		\$1,844,321.02		(\$14,395.03)		\$34,265.81		(\$45,510.93)		\$1,818,680.87

Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	Period Income(\$)
Bank Sweep		TD BANK NA ^{x,z}			0.00	19,870.78	19,870.78		0.45%	2.69
Total Cash and Cash Investments					\$0.00	\$19,870.78	\$19,870.78			

Positions

Security Type	Symbol	Description	Quantity	Price(\$)	Market Value(\$)
Mutual Fund	DFGBX	DFA FIVE-YEAR GLOBAL FIX [◇] ED-INCOME I	23,542.9940	10.07000	237,077.95
	DFAPX	DFA INVESTMENT GRADE I [◇]	23,700.5320	9.57000	226,814.09
	DWFIX	DFA WORLD EX US GOVERNME [◇] NT FXD INC I	28,300.0830	8.09000	228,947.67
	DFCEX	DFA EMERGING MARKETS COR [◇] E EQUITY I	5,439.5400	21.09000	114,719.90
	DFIEX	DFA INTERNATIONAL CORE E [◇] QUITY I	21,708.1470	14.05000	304,999.47



Schwab One® Account of

FLORIDA ALLIANCE FOR ASSISTIVE

Statement Period

September 1-30, 2023

Positions (Continued)

Security Type	Symbol	Description	Quantity	Price(\$)	Market Value(\$)
Mutual Fund	DFREX	DFA REAL ESTATE SECURITI ⁰ ES I	1,974.3130	34.12000	67,363.56
	DFOEX	DFA US CORE EQUITY 1 I ⁰	19,048.5520	32.49000	618,887.45
Total Positions					\$1,798,810.09

Transactions - Summary

Beginning Cash* as of 09/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Fees	=	Ending Cash* as of 09/30
\$0.00		\$19,868.09		\$0.00		(\$14,395.03)		\$0.00		\$14,397.72		\$0.00		\$19,870.78

Other Activity
\$1,844,321.02

Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.

*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)
09/05	Deposit	Account Transfer		TDA TO CS&CO TRANSFER				19,868.09
	Other Activity	Account Transfer	DFCEX	DFA EMERGING MARKETS CORE EQUITY I	5,383.0160	21.8600		117,672.73
	Other Activity	Account Transfer	DFGBX	DFA FIVE-YEAR GLOBAL FIXED-INCOME I	23,301.0970	10.1400		236,273.12
	Other Activity	Account Transfer	DFIEX	DFA INTERNATIONAL CORE EQUITY I	21,557.5350	14.5400		313,446.56
	Other Activity	Account Transfer	DFAPX	DFA INVESTMENT GRADE I	23,528.2060	9.7500		229,400.01
	Other Activity	Account Transfer	DFREX	DFA REAL ESTATE SECURITIES I	1,963.9660	36.4700		71,625.84
	Other Activity	Account Transfer	DFOEX	DFA US CORE EQUITY 1 I	18,976.5670	33.9700		644,633.98
	Other Activity	Account Transfer	DWFIX	DFA WORLD EX US GOVERNMENT FXD INC I	27,763.3590	8.3300		231,268.78
09/18	Interest	Bank Interest ^{X,Z}		BANK INT 081623-091523				2.69
09/28	Purchase	Reinvested Shares	DFCEX	DFA EMERGING MARKETS COR E EQUITY I	56.5240	21.0000		(1,187.01)
	Purchase	Reinvested Shares	DFGBX	DFA FIVE-YEAR GLOBAL FIX ED-INCOME I	241.8970	10.0700		(2,435.90)
	Purchase	Reinvested Shares	DFIEX	DFA INTERNATIONAL CORE E QUNITY I	150.6120	14.1100		(2,125.14)



Transaction Details (Continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)
09/28	Purchase	Reinvested Shares	DFAPX	DFA INVESTMENT GRADE I	172.3260	9.5600		(1,647.44)
	Purchase	Reinvested Shares	DFREX	DFA REAL ESTATE SECURITI ES I	10.3470	34.0400		(352.22)
	Purchase	Reinvested Shares	DFEOX	DFA US CORE EQUITY 1 I	71.9850	32.6200		(2,348.16)
	Purchase	Reinvested Shares	DWFIX	DFA WORLD EX US GOVERNME NT FXD INC I	536.7240	8.0100		(4,299.16)
	Dividend	Div For Reinvest	DFCEX	DFA EMERGING MARKETS COR				1,187.01
	Dividend	Div For Reinvest	DFGBX	DFA FIVE-YEAR GLOBAL FIX				2,435.90
	Dividend	Div For Reinvest	DFIEX	DFA INTERNATIONAL CORE E				2,125.14
	Dividend	Div For Reinvest	DFAPX	DFA INVESTMENT GRADE I				1,647.44
	Dividend	Div For Reinvest	DFREX	DFA REAL ESTATE SECURITI				352.22
	Dividend	Div For Reinvest	DFEOX	DFA US CORE EQUITY 1 I				2,348.16
	Dividend	Div For Reinvest	DWFIX	DFA WORLD EX US GOVERNME				4,299.16
Total Transactions								\$1,864,191.80

Date column represents the Settlement/Process date for each transaction.

Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
09/01	Beginning Balance ^{x,z}	\$0.00	09/30	Ending Balance ^{x,z}	\$19,870.78
09/05	BANK CREDIT FROM BROKERAGE ^x	19,868.09	09/29	Interest Rate ^{* z}	0.45%
09/15	BANK INTEREST - TD BANK NA ^{x,z}	2.69			

* Your interest period was 01/10/23 - 09/15/23. ^z

Endnotes For Your Account

- [◇] Dividends paid on this security will be automatically reinvested.
- ^x Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.

^z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.



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Schwab One® Account of

FLORIDA ALLIANCE FOR ASSISTIVE

Statement Period

September 1-30, 2023

Terms and Conditions (Continued)

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Schwab One® Account of

FLORIDA ALLIANCE FOR ASSISTIVE

Account Number
8770-5537

Statement Period
September 1-30, 2023

Account Summary

Ending Account Value
as of 09/30

\$422,031.48

This Statement

Beginning Value	\$0.00
Deposits	6,574.40
Withdrawals	0.00
Dividends and Interest	3,200.09
Transfer of Securities(In/Out)	426,436.78
Market Value Change	(14,179.79)
Fees	0.00
Ending Value	\$422,031.48

Your Independent Investment Manager and/or Advisor

SMITH BRUER ADVISORS LLC
1700 SUMMIT LAKE DR
STE 102
TALLAHASSEE FL 32317
1 (800) 387-3487

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FLORIDA ALLIANCE FOR ASSISTIVE
2145 DELTA BLVD STE 200
TALLAHASSEE FL 32303-4244



A Message About Your Account

Bank Sweep Feature During Transition.

This account statement reflects transactions associated with transitioning your brokerage account from TD Ameritrade to Charles Schwab & Co., Inc. (Schwab). Specifically, this statement reflects an initial deposit of your cash at Schwab before being swept to the applicable Program Bank(s) in Schwab’s Bank Sweep Feature. In fact, your cash remained at the Program Bank(s) during this time period and remained eligible for FDIC Insurance coverage up to the applicable limits throughout the transition process.

Please also note: Your new Schwab statement was designed to help you find your account and investment information quickly. Please visit schwab.com/statement to view our How-to Guide, which will walk you through the features on your new statement. (1023-3UCK)

Positions - Summary

Beginning Value as of 09/01	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	Ending Value as of 09/30
\$0.00		\$426,436.78		(\$3,199.20)		\$9,774.49		(\$10,980.59)		\$422,031.48

Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	Period Income(\$)
Bank Sweep		TD BANK NA ^{x,z}			0.00	6,575.29	6,575.29		0.45%	0.89
Total Cash and Cash Investments					\$0.00	\$6,575.29	\$6,575.29			

Positions

Security Type	Symbol	Description	Quantity	Price(\$)	Market Value(\$)
Mutual Fund	DFGBX	DFA FIVE-YEAR GLOBAL FIX [◇] ED-INCOME I	5,117.2460	10.07000	51,530.67
	DFAPX	DFA INVESTMENT GRADE I [◇]	5,169.9230	9.57000	49,476.16
	DWFIX	DFA WORLD EX US GOVERNME [◇] NT FXD INC I	6,083.1890	8.09000	49,213.00
	DFCEX	DFA EMERGING MARKETS COR [◇] E EQUITY I	1,077.4310	21.09000	22,723.02
	DFIEX	DFA INTERNATIONAL CORE E [◇] QUITY I	4,684.6980	14.05000	65,820.01



Positions (Continued)

Security Type	Symbol	Description	Quantity	Price(\$)	Market Value(\$)
Mutual Fund	DFREX	DFA REAL ESTATE SECURITI ⁰ ES I	451.7930	34.12000	15,415.18
	DFOOX	DFA US CORE EQUITY 1 I ⁰	4,963.9320	32.49000	161,278.15
Total Positions					\$415,456.19

Transactions - Summary

Beginning Cash* as of 09/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Fees	=	Ending Cash* as of 09/30
\$0.00		\$6,574.40		\$0.00		(\$3,199.20)		\$0.00		\$3,200.09		\$0.00		\$6,575.29
Other Activity		\$426,436.78	Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.											

*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)
09/05	Deposit	Account Transfer		TDA TO CS&CO TRANSFER				6,574.40
	Other Activity	Account Transfer	DFCEX	DFA EMERGING MARKETS CORE EQUITY I	1,066.2350	21.8600		23,307.90
	Other Activity	Account Transfer	DFGBX	DFA FIVE-YEAR GLOBAL FIXED-INCOME I	5,064.6680	10.1400		51,355.73
	Other Activity	Account Transfer	DFIEX	DFA INTERNATIONAL CORE EQUITY I	4,652.1960	14.5400		67,642.93
	Other Activity	Account Transfer	DFAPX	DFA INVESTMENT GRADE I	5,132.3320	9.7500		50,040.24
	Other Activity	Account Transfer	DFREX	DFA REAL ESTATE SECURITIES I	449.4250	36.4700		16,390.53
	Other Activity	Account Transfer	DFOOX	DFA US CORE EQUITY 1 I	4,945.1730	33.9700		167,987.53
	Other Activity	Account Transfer	DWFIX	DFA WORLD EX US GOVERNMENT FXD INC I	5,967.8180	8.3300		49,711.92
09/18	Interest	Bank Interest ^{X,Z}		BANK INT 081623-091523				0.89
09/28	Purchase	Reinvested Shares	DFCEX	DFA EMERGING MARKETS COR E EQUITY I	11.1960	21.0000		(235.12)
	Purchase	Reinvested Shares	DFGBX	DFA FIVE-YEAR GLOBAL FIX ED-INCOME I	52.5780	10.0700		(529.46)
	Purchase	Reinvested Shares	DFIEX	DFA INTERNATIONAL CORE E QUNITY I	32.5020	14.1100		(458.61)



Transaction Details (Continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)
09/28	Purchase	Reinvested Shares	DFAPX	DFA INVESTMENT GRADE I	37.5910	9.5600		(359.37)
	Purchase	Reinvested Shares	DFREX	DFA REAL ESTATE SECURITI ES I	2.3680	34.0400		(80.60)
	Purchase	Reinvested Shares	DFEOX	DFA US CORE EQUITY 1 I	18.7590	32.6200		(611.92)
	Purchase	Reinvested Shares	DWFIX	DFA WORLD EX US GOVERNME NT FXD INC I	115.3710	8.0100		(924.12)
	Dividend	Div For Reinvest	DFCEX	DFA EMERGING MARKETS COR				235.12
	Dividend	Div For Reinvest	DFGBX	DFA FIVE-YEAR GLOBAL FIX				529.46
	Dividend	Div For Reinvest	DFIEX	DFA INTERNATIONAL CORE E				458.61
	Dividend	Div For Reinvest	DFAPX	DFA INVESTMENT GRADE I				359.37
	Dividend	Div For Reinvest	DFREX	DFA REAL ESTATE SECURITI				80.60
	Dividend	Div For Reinvest	DFEOX	DFA US CORE EQUITY 1 I				611.92
	Dividend	Div For Reinvest	DWFIX	DFA WORLD EX US GOVERNME				924.12
Total Transactions								\$433,012.07

Date column represents the Settlement/Process date for each transaction.

Bank Sweep Activity

Date	Description	Amount	Date	Description	Amount
09/01	Beginning Balance ^{x,z}	\$0.00	09/30	Ending Balance ^{x,z}	\$6,575.29
09/05	BANK CREDIT FROM BROKERAGE ^x	6,574.40	09/29	Interest Rate ^{* z}	0.45%
09/15	BANK INTEREST - TD BANK NA ^{x,z}	0.89			

* Your interest period was 01/10/23 - 09/15/23. ^z

Endnotes For Your Account

- ◇

Dividends paid on this security will be automatically reinvested.
- X

Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.
- Z

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Statement Period

September 1-30, 2023

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Schwab One® Account of

FLORIDA ALLIANCE FOR ASSISTIVE

Account Number
7964-5636

Statement Period
September 1-30, 2023

Account Summary

Ending Account Value
as of 09/30

\$295,622.41

This Statement

Beginning Value	\$0.00
Deposits	148,481.80
Withdrawals	0.00
Dividends and Interest	2,354.29
Transfer of Securities(In/Out)	152,016.42
Market Value Change	(7,230.10)
Fees	0.00
Ending Value	\$295,622.41

Your Independent Investment Manager and/or Advisor

SMITH BRUER ADVISORS LLC
1700 SUMMIT LAKE DR
STE 102
TALLAHASSEE FL 32317
1 (800) 387-3487

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FLORIDA ALLIANCE FOR ASSISTIVE
2145 DELTA BLVD STE 200
TALLAHASSEE FL 32303-4244



A Message About Your Account

Bank Sweep Feature During Transition.

This account statement reflects transactions associated with transitioning your brokerage account from TD Ameritrade to Charles Schwab & Co., Inc. (Schwab). Specifically, this statement reflects an initial deposit of your cash at Schwab before being swept to the applicable Program Bank(s) in Schwab’s Bank Sweep Feature. In fact, your cash remained at the Program Bank(s) during this time period and remained eligible for FDIC Insurance coverage up to the applicable limits throughout the transition process.

Please also note: Your new Schwab statement was designed to help you find your account and investment information quickly. Please visit [schwab.com/statement](https://www.schwab.com/statement) to view our How-to Guide, which will walk you through the features on your new statement. (1023-3UCK)

Positions - Summary

Beginning Value as of 09/01	+	Transfer of Securities(In/Out)	+	Dividends Reinvested	+	Cash Activity	+	Change in Market Value	=	Ending Value as of 09/30
\$0.00		\$152,016.42		(\$2,334.20)		\$150,836.09		(\$4,895.90)		\$295,622.41

Cash and Cash Investments

Type	Symbol	Description	Quantity	Price(\$)	Beginning Balance(\$)	Ending Balance(\$)	Change in Period Balance(\$)	Pending/Unsettled Cash(\$)	Interest/ Yield Rate	Period Income(\$)
Bank Sweep		TD BANK NA ^{X,Z}			0.00	4,461.99	4,461.99		0.45%	20.09
Total Cash and Cash Investments					\$0.00	\$4,461.99	\$4,461.99			

Positions

Security Type	Symbol	Description	Quantity	Price(\$)	Market Value(\$)
Mutual Fund	DFGBX	DFA FIVE-YEAR GLOBAL FIX [◇] ED-INCOME I	3,811.3480	10.07000	38,380.27
	DFAPX	DFA INVESTMENT GRADE I [◇]	3,960.6160	9.57000	37,903.10
	DWFIX	DFA WORLD EX US GOVERNME [◇] NT FXD INC I	4,678.9460	8.09000	37,852.67
	DFCEX	DFA EMERGING MARKETS COR [◇] E EQUITY I	839.9510	21.09000	17,714.57
	DFIEX	DFA INTERNATIONAL CORE E [◇] QUITY I	3,345.7480	14.05000	47,007.76



Positions (Continued)

Security Type	Symbol	Description	Quantity	Price(\$)	Market Value(\$)
Mutual Fund	DFREX	DFA REAL ESTATE SECURITI ⁰ ES I	343.9190	34.12000	11,734.52
	DFOEX	DFA US CORE EQUITY 1 I ⁰	3,095.3380	32.49000	100,567.53
Total Positions					\$291,160.42

Transactions - Summary

Beginning Cash* as of 09/01	+	Deposits	+	Withdrawals	+	Purchases	+	Sales/Redemptions	+	Dividends/Interest	+	Fees	=	Ending Cash* as of 09/30
\$0.00		\$148,481.80		\$0.00		(\$146,374.10)		\$0.00		\$2,354.29		\$0.00		\$4,461.99
Other Activity		\$152,016.42	Other activity includes transactions which don't affect the cash balance such as stock transfers, splits, etc.											

*Cash (includes any cash debit balance) held in your account plus the value of any cash invested in a sweep money fund.

Transaction Details

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)
09/05	Deposit	Account Transfer		TDA TO CS&CO TRANSFER				148,481.80
	Other Activity	Account Transfer	DFCEX	DFA EMERGING MARKETS CORE EQUITY I	474.1750	21.8600		10,365.47
	Other Activity	Account Transfer	DFGBX	DFA FIVE-YEAR GLOBAL FIXED-INCOME I	1,676.4850	10.1400		16,999.56
	Other Activity	Account Transfer	DFIEX	DFA INTERNATIONAL CORE EQUITY I	1,808.6290	14.5400		26,297.47
	Other Activity	Account Transfer	DFAPX	DFA INVESTMENT GRADE I	1,686.5360	9.7500		16,443.73
	Other Activity	Account Transfer	DFREX	DFA REAL ESTATE SECURITIES I	174.0920	36.4700		6,349.14
	Other Activity	Account Transfer	DFOEX	DFA US CORE EQUITY 1 I	1,744.0630	33.9700		59,245.82
	Other Activity	Account Transfer	DWFIX	DFA WORLD EX US GOVERNMENT FXD INC I	1,958.6110	8.3300		16,315.23
09/18	Interest	Bank Interest ^{X,Z}		BANK INT 081623-091523				20.09
09/26	Purchase		DFCEX	DFA EMERGING MARKETS COR E EQUITY I Commission \$9.99	357.0480	21.4200	9.99	(7,657.95)
	Purchase		DFGBX	DFA FIVE-YEAR GLOBAL FIX ED-INCOME I Commission \$9.99	2,095.7030	10.1700	9.99	(21,323.29)



Transaction Details (Continued)

Date	Category	Action	Symbol/ CUSIP	Description	Quantity	Price/Rate per Share(\$)	Charges/ Interest(\$)	Amount(\$)
09/26	Purchase		DFIEX	DFA INTERNATIONAL CORE E QUITY I Commission \$9.99	1,513.9060	14.3000	9.99	(21,658.85)
	Purchase		DFAPX	DFA INVESTMENT GRADE I Commission \$9.99	2,245.2820	9.6600	9.99	(21,699.41)
	Purchase		DFREX	DFA REAL ESTATE SECURITI ES I Commission \$9.99	168.0240	34.7300	9.99	(5,845.47)
	Purchase		DFEOX	DFA US CORE EQUITY 1 I Commission \$9.99	1,339.5780	32.8800	9.99	(44,055.32)
	Purchase		DWFIX	DFA WORLD EX US GOVERNME NT FXD INC I Commission \$9.99	2,631.5970	8.2800	9.99	(21,799.61)
09/28	Purchase	Reinvested Shares	DFCEX	DFA EMERGING MARKETS COR E EQUITY I	8.7280	21.0000		(183.29)
	Purchase	Reinvested Shares	DFGBX	DFA FIVE-YEAR GLOBAL FIX ED-INCOME I	39.1600	10.0700		(394.34)
	Purchase	Reinvested Shares	DFIEX	DFA INTERNATIONAL CORE E QUITY I	23.2130	14.1100		(327.54)
	Purchase	Reinvested Shares	DFAPX	DFA INVESTMENT GRADE I	28.7980	9.5600		(275.31)
	Purchase	Reinvested Shares	DFREX	DFA REAL ESTATE SECURITI ES I	1.8030	34.0400		(61.36)
	Purchase	Reinvested Shares	DFEOX	DFA US CORE EQUITY 1 I	11.6970	32.6200		(381.57)
	Purchase	Reinvested Shares	DWFIX	DFA WORLD EX US GOVERNME NT FXD INC I	88.7380	8.0100		(710.79)
	Dividend	Div For Reinvest	DFCEX	DFA EMERGING MARKETS COR				183.29
	Dividend	Div For Reinvest	DFGBX	DFA FIVE-YEAR GLOBAL FIX				394.34
	Dividend	Div For Reinvest	DFIEX	DFA INTERNATIONAL CORE E				327.54
	Dividend	Div For Reinvest	DFAPX	DFA INVESTMENT GRADE I				275.31
	Dividend	Div For Reinvest	DFREX	DFA REAL ESTATE SECURITI				61.36
	Dividend	Div For Reinvest	DFEOX	DFA US CORE EQUITY 1 I				381.57
	Dividend	Div For Reinvest	DWFIX	DFA WORLD EX US GOVERNME				710.79
Total Transactions								\$156,478.41

Date column represents the Settlement/Process date for each transaction.



Statement Period
September 1-30, 2023

Bank Sweep Activity

Date	Description	Amount
09/01	Beginning Balance ^{x,z}	\$0.00
09/05	BANK CREDIT FROM BROKERAGE ^x	148,481.80
09/15	BANK INTEREST - TD BANK NA ^{x,z}	20.09

* Your interest period was 01/10/23 - 09/15/23. ^z

Date	Description	Amount
09/26	BANK TRANSFER TO BROKERAGE	(144,039.90)
09/30	Ending Balance ^{x,z}	\$4,461.99
09/29	Interest Rate ^{* z}	0.45%

Endnotes For Your Account

- ◇ Dividends paid on this security will be automatically reinvested.
- X Bank Sweep deposits are held at FDIC-insured Program Banks, which are listed in the Cash Features Disclosure Statement.

- Z For the Bank Sweep and Bank Sweep for Benefit Plans features, interest is paid for a period that differs from the Statement Period. Balances include interest paid as indicated on your statement by Schwab or one or more of its Program Banks. These balances do not include interest that may have accrued during the Statement Period after interest is paid. The interest paid may include interest that accrued in the prior Statement Period.

Terms and Conditions

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Terms and Conditions (Continued)

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Eric Reed <ereed@faast.org>

please forward to the members of the FAAST planning team with the indicated attachments

1 message

Mark Bennett <markuniting@gmail.com>
To: Eric Reed <ereed@faast.org>

Thu, Oct 19, 2023 at 9:45 AM

Greetings to everyone!

I look forward to working together to use the planning process to:

1. Strengthen your sense of unity and collaboration
2. Tap your diverse perspectives to generate collective wisdom and make wise choices
3. Confirm a set of priorities that will guide FAAST'S efforts for the next two years
4. Establish a framework of integrity-in-action that will establish accountability for successful implementation
5. Earn trust and credibility from your stakeholders.

A successful strategic plan must be a *living* plan. Not a perfect plan, but a good plan that moves into action, is reviewed regularly, and adapted as necessary to improve performance and address changes in operating conditions.

You may be familiar with strategic planning from other organization experiences. There are varied approaches. There are also varied levels of quality and effectiveness. Unfortunately, poor strategic planning is not uncommon. If you want to understand more about the process, I attach a wise planning guide for you to refer to. You do not need to read this before our first meeting! Occasionally, I will ask you to make reference to specific pages to provide a shared understanding of what we are doing.

Before looking forward, wise planning pauses and looks backward to consider what can be learned from previous planning.

In our first meeting, we will:

- A. Review the Mission Statement and note any ideas for change (see pages 10-11 in guide)
- B. Review the Values Statement and note any ideas for change (see pages 12-13 in guide)
- C. Begin to develop a Vision for FAAST (the previous plan did not have a Vision Statement) (see pages 14-16 in guide). Note the difference between an organization's distant/permanent vision of a better *world*, and a vision of how you want FAAST to look different in 2 years when you succeed with this plan. This is a *horizon* that you can clearly imagine together.)

There is an unusual amount of preparation for this first meeting. Usually you will not need to take more than 30 minutes to review the notes from the last meeting, look over the agenda for the upcoming meeting, and review a draft document that will be discussed.

You may need 1-2 hours for the following preparation. The bulk of this time will be for review of the 26 surveys, taking notes about issues that you think are important to consider in this strategic plan.

Preparation Task #1. Please take the time to review the Mission and Values.

- A. Give a separate rating of your level of satisfaction with the current versions of the:
- Mission Statement

- Core Values Statement

- 5 - Very satisfied (it is great as is)
- 4 - Satisfied (it is solid as is)
- 3 - OK, (it is good enough and we don't need to spend any time on it)
- 2 - Needs improvement (let's rework and improve it)
- 1 - Dissatisfied (let's take a blank piece of paper and start from scratch)

If you have some ideas you want to offer to modify and improve any of these statements, make notes and bring them to the meeting.

B. Review the progress summary

Preparation Task #2 Review the assessment of the previous plan and the results.

After noting what has been learned from the last planning effort, the next level of intelligence comes from an assessment of the operating reality of the organization.

The most common form of this assessment is usually called a SWOT analysis (Strengths, Weaknesses, Opportunities, Threats). My version of this is slightly different. I call it a SPOCK analysis after the famous character in Star Trek and his devotion to logic. (S trengths, + P roblems, + O pportunities + C hallenges = K nowledge). I use Problems instead of Weaknesses and Challenges instead of Threats because a weakness is only one type of problem and a threat is only one type of challenge.

Preparation Task #3. Review the recent (9/23) SWOT analysis done by the FFAST staff.

Preparation Task #4 Review the recent SPOC analysis in the survey of staff, board, and community stakeholders. Start with the answers to Question 5 about the Vision that participants have for FFAST.


Then, look at the answers to Questions 1-4 (the SPOC analysis) and Question 6, a general question to receive any additional information the respondent wanted to share. Look for patterns in the responses, e.g. issues identified by multiple respondents. Make notes to bring to the meeting.

Sincerely,

Mark Bennett

10 attachments

 **strategic planning master 12-22 without quotations.pdf**
371K

 **FFAST Mission and Values Worksheet.docx**
15K

FAAST Mission Statement

To improve the quality of life for Floridians with disabilities by increasing access to assistive technology through empowerment and collaboration.

Your rating: _____

5 Very satisfied (it is great as is)

4 Satisfied (it is solid and works well)

3 OK (it is acceptable and we don't need to spend time on it)

2 Needs improvement (let's rework it)

1 Unacceptable (let's start over with a blank piece of paper)

Notes

FAAST Values Statement

Above all, Floridians with disabilities shall have the opportunity to pursue:

Knowledge – Easy and open access to information about equipment, providers, techniques, networks, and other available resources related to assistive technology;

Choice – Utilizing knowledge to empower one's self without hinderance from disability, regulation, misinformation, or availability of resources; and

Independence – Utilizing knowledge and choice to improve personal function and advocacy; leading to self-sufficiency, connection to community, and individual goal achievement.

In pursuit of these paramount values, FAAST abides by these guiding operating principles:

Empowerment – Promoting the use of information and technology to provide opportunity, choice, and ultimately independence for individual consumers;

Assistive Technology – Promoting the use of any electronic or mechanical device that

_a_l_l_o_w_s_a_p_e_r_s_o_n_t_o_d_o_t_h_i_n_g_s_f_o_r_
_t_h_e_m_s_e_l_v_e_s_t_h_a_t_m_i_g_h_t_o_t_h_e_r_w_i_s_e_b_e_
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Compassion – _U_n_d_e_r_s_t_a_n_d_i_n_g_,_l_i_s_t_e_n_i_n_g_,_a_n_d_
_e_m_p_a_t_h_i_z_i_n_g_w_i_t_h_t_h_e_i_n_d_i_v_i_d_u_a_l_n_e_e_d_s_o_f_
_e_v_e_r_y_c_o_n_s_u_m_e_r;_

Inclusion – _E_n_c_o_u_r_a_g_i_n_g_a_l_l_F_l_o_r_i_d_i_a_n_s_w_i_t_h_a_
_d_i_s_a_b_i_l_i_t_y_t_o_c_o_n_s_i_d_e_r_a_s_s_i_s_t_i_v_e_s_e_r_v_i_c_e_s_
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Collaboration – _P_r_o_a_c_t_i_v_e_l_y_s_e_e_k_i_n_g_o_p_p_o_r_t_u_n_i_t_i_e_s_t_o_
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_o_r_g_a_n_i_z_a_t_i_o_n_s_,_a_s_s_o_c_i_a_t_i_o_n_s_,_g_r_o_u_p_s_,_a_n_d/_o_r_
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_a_n_d_i_n_d_e_p_e_n_d_e_n_c_e_a_m_o_n_g_F_l_o_r_i_d_i_a_n_s_w_i_t_h_
_d_i_s_a_b_i_l_i_t_i_e_s._

Your rating: _____

5 Very satisfied (it is great as is)

4 Satisfied (it is solid and works well)

3 OK (it is acceptable and we don't need to spend time on it)

2 Needs improvement (let's rework it)

1 Unacceptable (let's start over with a blank piece of paper)

Notes

SWOT Analysis

Company Name: FFAST - Staff 9/6/2023

Strengths:

- Team/teamwork
- Mission focused
- Cohesiveness
- Better coverage - expanded center network
- Space - office (hosting groups)
- partners motivated to help achieve mission
- board activity
- process/procedures
- Individual staff - unique expertise - right people for the job
- public awareness growth
- viewed as Important or valuable partner
- AT library - especially certain categories
- Online/marketing presence Improved
- Funding Is per statute
- low staff turnover
- AMAZING staff

Weaknesses:

- Not known enough by Individuals, care givers
- AT library online
- AT library - certain categories
- Finishing touches to office
- Space not as accessible as should be
- Device training needs - AT expertise not on staff
- Not enough collaboration with other non profits
- Funding - need more \$\$
- RDC - different level of AT knowledge, expertise
- Rural service
- RDC service areas - serving outside of direct market
- AT Inventory
- Device returns process. Need stronger collection process
- Shipping Issues - broken equipment
- Computer recycling
- AT List
- ReUse
- Not the AT resource for all sectors, groups
- Accessibility - online
- leadership turnover
- online AT training videos or resources

Opportunities:

- Become referral source for other organizations (Goodwill)
- Employment accommodation opportunities
- Add permanent funding from VR
- warranty / shipping cases / Improve AT security
- fundraising
- use space for more outside groups
- distributing marketing more - encourage word of mouth
- host AT specific groups / activities at office
- renting high \$\$/Hi-tech AT Instead of purchasing
- 3D printing opportunity
- Recreation AT programs
- FSU/FAMU/TCC/Lively collaboration
- Computer recycling
- Collaboration with other non-profits
- AT expo / other events
- Strengthen/build relationships with contractors
- Marketing more AT focused / FFAST focused
- Blogs, success stories
- Online AT reuse/AT List
- Step up opportunities
- YouTube presence

Threats:

- Viewed as a threat by other organizations (competition)
- AT Industry advances too fast - AT becomes obsolete too quickly for funding.
- VR - unknowns, instability
- legislative concerns - uncertain
- federal changes in program
- contractors vs partners
- CIL network issues
- Ebb and flow of needs - consistent deliverables
- Zoom fatigue

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 12:40:41 PM
Last Modified: Tuesday, September 26, 2023 12:52:04 PM
Time Spent: 00:11:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Staff
Second	Board
Third	Volunteers

#2

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Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 1:16:31 PM
Last Modified: Tuesday, September 26, 2023 1:27:06 PM
Time Spent: 00:10:35

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Regional Centers
Second	Legislative
Third	Resource Library & Loan Program

#3

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Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 4:44:17 PM
Last Modified: Tuesday, September 26, 2023 4:54:41 PM
Time Spent: 00:10:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Budget
Second	Statewide Subcontractors
Third	Board Attendance

#4

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Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 9:13:31 AM
Last Modified: Thursday, September 28, 2023 10:03:47 AM
Time Spent: 00:50:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	FAAST has a talented & diverse leadership and communication with Board is excellent
Second	organization member's passion for serving the disability community
Third	successful completion of 3-year plan sets stage for next big steps

#5

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 3:04:34 PM
Last Modified: Thursday, September 28, 2023 3:09:44 PM
Time Spent: 00:05:10

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Friendly & Caring Staff
Second	Sufficient Budget
Third	Variety of Services

#6

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Sunday, October 01, 2023 4:47:23 PM
Last Modified: Sunday, October 01, 2023 5:06:46 PM
Time Spent: 00:19:22

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Strong stable leadership
Second	Good working relationships with stakeholders
Third	Insiders who care about the mission

#7

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 9:56:40 AM
Last Modified: Tuesday, October 03, 2023 11:20:04 AM
Time Spent: 01:23:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	access to AT at the regional and state level
Second	good leadership from headquarter's helps regional administration understand clear expectations to fulfill contract

#8

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Tuesday, October 03, 2023 12:04:17 PM
Time Spent: 01:42:12

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Ongoing connections with well established partners. I think this has been the biggest benefit to FAAST, as well as the success of FAAST.
Second	Relying on the knowledge of experienced staff members to continue to expand and support an array of consumers.

#9

COMPLETE

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Last Modified: Tuesday, October 03, 2023 12:41:11 PM
Time Spent: 00:33:45

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Potential of FAAST's interest in refreshing equipment inventory in the centers.
Second	Expertise of some RDC Personnel providing services
Third	Leveraging the combination of available resources/programs at Headquarters + RDCs

#10

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Tuesday, October 03, 2023 1:29:22 PM
Time Spent: 01:22:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First

FAAST headquarters has increasingly sought feedback and perspective from RDCs regarding programming and implementation (e.g., FAAST U and trainings) and is seeking to implement changes based on that feedback. They are also disclosing information to show how their work is being perceived. This shows an increase in transparency that is greatly appreciated.

Second

Renewed interest increasing the size of the RDC inventory (i.e., increased equipment budget last year) as this is central to FAAST's mission

Third

Emphasis on training and supporting RDCs in seeking education to be up-to-date and to provide appropriate services

#11**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 5:33:45 PM
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Time Spent: 00:52:04

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First

Source for AT device loans

Second

strength of RDC's

Third

a source of financial loans for AT

#12**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 11:01:36 AM
Last Modified: Wednesday, October 04, 2023 11:16:51 AM
Time Spent: 00:15:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Hannah, she is wonderful!
Second	Provide a platform for more calibration between centers
Third	Use the ability to buy items in bulk for all the centers to reduce the price.

#13

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:14:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Keeping the board and staff intertwined (on committees) for across the organization progress.
Second	Help make the financials more understandable and share trends between years.

#14

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 05, 2023 9:10:13 AM
Last Modified: Thursday, October 05, 2023 9:28:34 AM
Time Spent: 00:18:21

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First

Hannah

Second

Quick responses when an issue comes up at our RDC**#15****COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 9:57:02 AM
Last Modified: Friday, October 06, 2023 10:31:56 AM
Time Spent: 00:34:53

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First

Staff

Second

Progressive

Third

Communication**#16****COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 4:58:34 PM
Last Modified: Friday, October 06, 2023 5:27:17 PM
Time Spent: 00:28:42

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Dedicated leadership
Second	Cohesive HQ staff
Third	Engaged Board

#17

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:34:16 AM
Last Modified: Tuesday, October 10, 2023 10:54:44 AM
Time Spent: 00:20:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	We have a devoted staff
Second	Use volunteers as much as possible
Third	Provide outreach reports on a quarterly basis- How many people did we impact

#18

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:17:35 AM
Last Modified: Tuesday, October 10, 2023 11:34:46 AM
Time Spent: 00:17:11

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	the dedicated staff
Second	strong board
Third	data based decisions

#19**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:38:35 AM
Last Modified: Tuesday, October 10, 2023 11:45:51 AM
Time Spent: 00:07:16

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Staff - always very responsive
Second	Statewide reach

#20**COMPLETE**

Collector: Web Link 1 (Web Link)
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Last Modified: Tuesday, October 10, 2023 12:30:51 PM
Time Spent: 00:05:56

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Coordinators
Second	Volunteers
Third	Interns

#21**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:10:11 AM
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Time Spent: 01:36:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Knowledgeable staff with diverse skillsets and backgrounds
Second	Flexible and responsive work environment
Third	Marketing and Communication

#22**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:23:28 AM
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Time Spent: 02:20:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Collaboration
Second	Training
Third	budget for the community

#23

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 04:15:58

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	staff
Second	board members
Third	volunteers

#24

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 2:51:27 PM
Last Modified: Tuesday, October 10, 2023 3:02:47 PM
Time Spent: 00:11:20

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Engaged board
Second	Positive and experienced staff
Third	Increased non-recurring funding

#25

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:39:19 AM
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Time Spent: 03:50:33

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First	Multiple locations across Florida to serve a wide geographic area
Second	Statewide lending library
Third	An organizational culture that is open to change and adaptable to evolving technology and service needs

#26

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 12, 2023 11:09:30 AM
Last Modified: Thursday, October 12, 2023 11:38:01 AM
Time Spent: 00:28:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q1

INSIDE THE ORGANIZATION. (Inside means FAAST including all aspects...staff...volunteers...board members...budget and other resources) What are the most important internal strengths that FAAST has to take advantage of that can increase the positive impact and effectiveness of our work in the next two years?

First

Volunteers

Second

Board Members

Third

Staff

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 12:40:41 PM
Last Modified: Tuesday, September 26, 2023 12:52:04 PM
Time Spent: 00:11:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Staff moral
Second	Board involvement
Third	Volunteer involvement

#2

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 1:16:31 PM
Last Modified: Tuesday, September 26, 2023 1:27:06 PM
Time Spent: 00:10:35

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Marketing & Communications
Second	Board Recruitment
Third	Staff training

#3

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 4:44:17 PM
Last Modified: Tuesday, September 26, 2023 4:54:41 PM
Time Spent: 00:10:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	New Technologies
Second	Knowledge opf updates
Third	public Events

#4

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 9:13:31 AM
Last Modified: Thursday, September 28, 2023 10:03:47 AM
Time Spent: 00:50:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	continue to educate/community awareness/branding
Second	appropriate funding for state of the art devices at all RDC's
Third	do you have enough staff to support growth?

#5

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 3:04:34 PM
Last Modified: Thursday, September 28, 2023 3:09:44 PM
Time Spent: 00:05:10

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

Additional cross training of employees on all services provided by FAAST

Second

Better advertising/marketing to reach more residents

#6

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Sunday, October 01, 2023 4:47:23 PM
Last Modified: Sunday, October 01, 2023 5:06:46 PM
Time Spent: 00:19:22

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

Additional sources of funding

Second

Closer integration with the Regional Service Centers

Third

Closer integration with state agencies

#7

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 9:56:40 AM
Last Modified: Tuesday, October 03, 2023 11:20:04 AM
Time Spent: 01:23:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

understanding/identifying each rdc's "expertise" so we can collaborate with each other and better serve our consumers even if they are outside our catchmen area

#8

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 10:22:05 AM
Last Modified: Tuesday, October 03, 2023 12:04:17 PM
Time Spent: 01:42:12

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	While it is important to ensure that we're supporting and referring potential consumers to their corresponding RDC, it's also important to refer consumers to RDCs who may have a great expertise in a certain area. Thereby working as a team versus in competition.
Second	Ensuring that we're supportive of each other and not in competition with each other.

#9

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Tuesday, October 03, 2023 12:41:11 PM
Time Spent: 00:33:45

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Need to keep equipment inventory current on the ground floor (i.e., in the RDCs where Floridians are coming to access equipment and related services daily)
Second	Essentially flat funding for decades is highly challenging for ongoing RDC operations.
Third	Need to increase Board Member understanding of the realities of providing services on a daily basis through increased interaction/touch points with RDCs (as was the case in decades past)

#10

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 12:06:51 PM
Last Modified: Tuesday, October 03, 2023 1:29:22 PM
Time Spent: 01:22:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Although RDC Contract Manager has sought RDC input, it would benefit all if RDCs were directly invited to Board meetings and their input directly sought on matters. They are on the ground and have the most frequent interactions with the community.
Second	Specific processes are time consuming and need to be modernized (e.g., shipping processes, scheduling of events, etc.). Streamlining these process would increase efficiency.
Third	Not all FAAST team members have AT backgrounds. Though FAAST supports education, they should consider adopting certain standards so information is consistent and so RDCs are not put in the position of correcting each other.

#11

COMPLETE

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Time Spent: 00:52:04

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	confirm on line device loan requests
Second	maintain / increase funding
Third	Modernize device loan inventory

#12

COMPLETE

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Time Spent: 00:15:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Speed of purchasing AT
Second	Ensure monthly payment are made in a timely mannor
Third	Do more promotion of your partners (us)

#13

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 1:12:33 PM
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Time Spent: 00:14:07

Page 1: FAAST Strategic Planning Survey Fall 2023**Q2**

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

Hiring a staff member with in depth knowledge of AT, networking, and fundraising.

#14**COMPLETE**

Collector: Web Link 1 (Web Link)
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Last Modified: Thursday, October 05, 2023 9:28:34 AM
Time Spent: 00:18:21

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

Organization at the Tallahassee FAAST

Second

Lack of marketing effort

Third

Connecting with other state agencies

#15**COMPLETE**

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Time Spent: 00:34:53

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Increase Funding
Second	Contractual awards
Third	Budget line items for purchases of AT for RRC loan closets

#16

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:28:42

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	The website needs to be restructured for ease of understanding to a wider audience. The online library does not reflect our inventory accurately.
Second	We need more training for the RDC's in the functional use of assistive technology in the library.
Third	We need to continue to increase public awareness.

#17

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Time Spent: 00:20:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

An easier to understand benefits package for staff (Vacation time tiers and Insurance family plan)

#18

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:17:11

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

Identify brave/fierce goals

Second

don't settle for the status quo

Third

Train new board members

#19

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:07:16

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First

Funding

Second

Natads functioning (not sure if this belongs here)

#20

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:05:56

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Not getting devices back
Second	People not wanting to borrow devices because they cannot keep them

#21

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 01:36:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Improve Database (NATADS) - (not intuitive, slow, etc.)
Second	Improve access to State AT library programs and services
Third	Challenges with ordering process (i.e. follow ups on requests, when items are purchased, etc.)

#22

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:23:28 AM
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Time Spent: 02:20:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Collaboration some time is challenges
Second	referral and information get better to FAAST coordinator
Third	communication between in headquarter and our RCD office.

#23

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Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:37:32 AM
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Time Spent: 04:15:58

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	budget
Second	outreach and public awareness
Third	volunteers

#24

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 2:51:27 PM
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Time Spent: 00:11:20

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	develop additional funding sources
Second	have experienced AT professional on staff
Third	gain more FAAST interest through marketing/social media efforts

#25

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Time Spent:	03:50:33

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Limited staff with expertise and professional experience with assistive technology and disability services at FAAST headquarters
Second	Would benefit from providing comprehensive training programs for professionals, educators, and individuals with disabilities on a variety of assistive technology categories and topics
Third	Would benefit from providing standardized core equipment and training on how to use the equipment and who it benefits for new centers. Many centers have an area of speciality, however, when each center has a baseline knowledge of assistive technology and core equipment, it allows them to serve more people throughout their region who have diverse needs and abilities.

#26

COMPLETE

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Time Spent: 00:28:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q2

INSIDE THE ORGANIZATION. What are the most important internal problems that FAAST must address if we are going to increase the positive impact and effectiveness of our work in the next two years?

First	Keeping everyone on staff and making sure that they are
Second	happy and continue to love what they do!

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 12:40:41 PM
Last Modified: Tuesday, September 26, 2023 12:52:04 PM
Time Spent: 00:11:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers...funders...potential partners...stakeholders...trends...technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Consumers
Second	Funders
Third	Stakeholders

#2

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:10:35

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers...funders...potential partners...stakeholders...trends...technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Loan Program
Second	Funding
Third	Resource library

#3

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:10:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers...funders...potential partners...stakeholders...trends...technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Funders
Second	Trends
Third	Technology

#4

COMPLETE

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Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers...funders...potential partners...stakeholders...trends...technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	fundraising approval, seeking diverse funding sources, recurring donations
Second	collaborate & increase communications with partner organizations & asking them to spread the word & work of FAAST on a regular basis
Third	continue to educate Floridian's with testimonials & client stories

#5

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:05:10

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Increased marketing/advertising so more residents know about the organization
-------	---

#6

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:19:22

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Reaching families in the disability community for services
Second	Educating medical providers about the services FAAST offers
Third	Increase name and mission recognition

#7

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 01:23:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	opportunity for outside funding to supplement exiting funding
-------	---

#8

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 01:42:12

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Participating in community events to bring about awareness of FAAST services and resources.
Second	Advertising FAAST supports at University levels and Hospitals to truly disseminate this information to the community.

#9

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Collector: Web Link 1 (Web Link)
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Time Spent: 00:33:45

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Longstanding partnerships/collaborations held by RDC Institutions that can benefit FAAST
Second	RDC/Partner Organization Partnerships that afford high visibility in the community (i.e., some of the housing organizations provide highly valuable advertising to increase awareness of FAAST services/resources)
Third	Professional contacts/expertise of RDC staff that can allow FAAST to offer signature programming to enhance service-delivery

#10

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 01:22:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Continuing to increase FAAST presence with specific organizations (e.g., professional organizations, support groups, conferences, etc.)
Second	FAAST attends events or trainings that are hosted within the community. They would benefit from hosting more opportunities or co-hosting with other organizations. This emphasizes FAAST as the leader in Florida in AT.
Third	FAAST has discussed working with AT vendors to creatively address AT inventory (e.g, leasing instead of purchasing). This would be an incredible solution and a great partnership.

#11**COMPLETE**

Collector: Web Link 1 (Web Link)
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Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	access to an ATP
Second	increase # of RDC to serve rural counties
Third	involve RDC in exhibits

#12**COMPLETE**

Collector: Web Link 1 (Web Link)
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Time Spent: 00:15:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Seeking more grant opportunities like the covid posts to help with budgets
Second	Share more training opportunities.
Third	Create better partnerships with the AT vendors to help support the centers efforts.

#13

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:14:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Fundraising in a variety of ways to grow our impact on our community.
Second	Conducting post-service interviews and sharing on social media to increase attention and awareness.
Third	Increasing partnerships with groups in the disability community (that have their own community outreach, to include our services).

#14

COMPLETE

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Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Connections with other social work organizations at the State level
Second	Better relationships with AT venders
Third	Connecting with other state AT agencies to see what works for them

#15

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:34:53

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Diversey funding streams
Second	Community education on programs at a State and Local Level
Third	Expansion of AT items for smart homes

#16

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 4:58:34 PM
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Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Building relationships with other human service agencies
Second	Focus our marketing more on AT than on general awareness
Third	Fundraising efforts

#17**COMPLETE**

Collector: Web Link 1 (Web Link)
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Time Spent: 00:20:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Fundraising
Second	More community outreach/Partnerships

#18**COMPLETE**

Collector: Web Link 1 (Web Link)
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Time Spent: 00:17:11

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Collaborate with veterans affairs
Second	Review data on areas being served/not served
Third	Collaboration opportunities with other agencies

#19

COMPLETE

Collector: Web Link 1 (Web Link)
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Time Spent: 00:07:16

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	RDCs
Second	Statewide reach

#20

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Tuesday, October 10, 2023 12:30:51 PM
Time Spent: 00:05:56

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	More devices
Second	More devices for the reuse program

#21

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:10:11 AM
Last Modified: Tuesday, October 10, 2023 12:46:39 PM
Time Spent: 01:36:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Seek funding to expand support services for the centers
Second	Strengthening our team of potential partners outside FAAST
Third	Engage with individuals with disabilities regarding their experiences with FAAST & other programs

#22

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:23:28 AM
Last Modified: Tuesday, October 10, 2023 1:43:35 PM
Time Spent: 02:20:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers...funders...potential partners...stakeholders...trends...technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	events
Second	vendors and federal support
Third	budget friendly mean Reutilization for not only repair also for small modification.

#23**COMPLETE**

Collector:	Web Link 1 (Web Link)
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Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers...funders...potential partners...stakeholders...trends...technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	technology
Second	community
Third	consumers

#24**COMPLETE**

Collector:	Web Link 1 (Web Link)
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Time Spent:	00:11:20

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	fundraising opportunities
Second	expanding/deepening relationships with disability stakeholders
Third	provide resources for contract partners to provide better services through AT knowledge and training from HQ

#25

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:39:19 AM
Last Modified: Tuesday, October 10, 2023 3:29:52 PM
Time Spent: 03:50:33

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	Leverage partnerships with community organizations accross the state to host monthly AT Awareness Days and increase opportunities for device demonstrations and loans for underserved counties
Second	Diversify funding and create a fundraising campaign to purchase assistive technology devices for those who cannot afford to aquire it any other way and do not qualify for the financial loan program
Third	Provide access to assessment and evaluation tools for matching individuals with the most suitable assistive technology solutions.

#26

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 12, 2023 11:09:30 AM
Last Modified: Thursday, October 12, 2023 11:38:01 AM
Time Spent: 00:28:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q3

OUTSIDE THE ORGANIZATION ("Outside" means the community... consumers... funders... potential partners... stakeholders... trends... technology...). What are the most important external opportunities that FAAST has to increase the positive impact and effectiveness of our work in the next two years?

First	make it worth CILs and others to work with FAAST
Second	Communication needs to be statewide(advertisement)

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 12:40:41 PM
Last Modified: Tuesday, September 26, 2023 12:52:04 PM
Time Spent: 00:11:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Grant participation
Second	Stakeholder involvement
Third	Increased technology

#2

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 1:16:31 PM
Last Modified: Tuesday, September 26, 2023 1:27:06 PM
Time Spent: 00:10:35

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Coalition of vendors
Second	Increase Fundraising
Third	Communications

#3

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 4:44:17 PM
Last Modified: Tuesday, September 26, 2023 4:54:41 PM
Time Spent: 00:10:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Potential partners
Second	The community
Third	Potential Consumers

#4

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 9:13:31 AM
Last Modified: Thursday, September 28, 2023 10:03:47 AM
Time Spent: 00:50:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	how to reach donors & create strategic relationships with large companies - guide for staff & board members - perhaps an online fundraising tool
Second	collecting data/contact information at events/social media & how to utilize it
Third	new & costly technology - keeping up to date loaner devices & variety

#5

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Thursday, September 28, 2023 3:09:44 PM
Time Spent: 00:05:10

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First

I'd like to see better communication with FFBF re:
partner loan program

#6

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Sunday, October 01, 2023 5:06:46 PM
Time Spent: 00:19:22

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First

Broad mission touching many different individual
issues in the disability community

#7

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 9:56:40 AM
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Time Spent: 01:23:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

Respondent skipped this question

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

#8

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 10:22:05 AM
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Time Spent: 01:42:12

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Continued exposure to the community about FAAST services.
-------	--

#9

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 12:07:25 PM
Last Modified: Tuesday, October 03, 2023 12:41:11 PM
Time Spent: 00:33:45

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Lack of Floridian awareness of FAAST as an organization and its services
Second	Rapidly evolving technology landscape -- must keep services current.
Third	Rapidly increasing costs of doing business in post-COVID era

#10

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 12:06:51 PM
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Time Spent: 01:22:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	There continues to be a lack of awareness in the community about what FAAST is and what services they provide.
Second	It is difficult for a local RDC to contact local services (such as VR) and initiate partnerships and programming. FAAST has many external partnerships at the state level that could be leveraged to build out more opportunities, events, and points of service.
Third	Technology is changing quickly - we need to be able to be more responsive to those changes which would involve not just an increased budget, but more continuous opportunities for purchasing as new technology becomes available and is requested.

#11

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 5:33:45 PM
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Time Spent: 00:52:04

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	increase name recognition
Second	maintain / increase funding
Third	Fundraising

#12

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 11:01:36 AM
Last Modified: Wednesday, October 04, 2023 11:16:51 AM
Time Spent: 00:15:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Visibility, a lot of people are still unaware of faast
Second	Look for more funding to offset the increase in cost of doing business.
Third	Marketing to new populations who arent aware of FAAST

#13

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 1:12:33 PM
Last Modified: Wednesday, October 04, 2023 1:26:41 PM
Time Spent: 00:14:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Partnering with other state-wide groups/organizations that support persons with disabilities, who use AT.
Second	Attending/hosting AT Makers events to solve accessibility problems for people in our community.
Third	Supporting end users on securing financial acquisition of AT (insurance, ADP)

#14**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Thursday, October 05, 2023 9:10:13 AM
Last Modified: Thursday, October 05, 2023 9:28:34 AM
Time Spent: 00:18:21

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Lack of awareness from the community
Second	Lack of desire to want to take a devices loan out
Third	Issues with the therapy filed not utilizing FAAST

#15**COMPLETE**

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 9:57:02 AM
Last Modified: Friday, October 06, 2023 10:31:56 AM
Time Spent: 00:34:53

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Community Education
Second	Samll scale home mod funding no cost to recipient (portable ramps)
Third	Identifying RRC service are needs

#16

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 4:58:34 PM
Last Modified: Friday, October 06, 2023 5:27:17 PM
Time Spent: 00:28:42

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Other human services agencies sometimes view FAAST as a competitor rather than a potential partner
Second	Technology becoming outdated rapidly/funding to purchase new items
Third	Federal changes to the program

#17

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:34:16 AM
Last Modified: Tuesday, October 10, 2023 10:54:44 AM
Time Spent: 00:20:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First

Cash flow while waiting on reimbursements

#18

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:17:35 AM
Last Modified: Tuesday, October 10, 2023 11:34:46 AM
Time Spent: 00:17:11

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First

reaching more veterans

Second

fund raising

Third

reaching underserved areas of Florida

#19

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:38:35 AM
Last Modified: Tuesday, October 10, 2023 11:45:51 AM
Time Spent: 00:07:16

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First

The ability for consumers to actually purchase the equipment they are loaned

Second

Funding

Third

Limitations of the statute

#20

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 12:24:54 PM
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Time Spent: 00:05:56

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First

More devices

Second

Help getting devices back from people who keep them

#21

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:10:11 AM
Last Modified: Tuesday, October 10, 2023 12:46:39 PM
Time Spent: 01:36:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	While we engage who we serve -- there is always a need to identify potential challenges for these populations, such as access to AT, Healthcare & AT, Education & AT
Second	Although the library is robust, there is still lack of access to life-changing AT such as wheelchairs, prosthetics, hearing aids and glasses. By creating partnerships with the private sector to build and shape the need for testing and backing, this could potentially get this AT to those who need it.
Third	AT solutions addressing some AT gaps, particularly in rural and remote areas. Setting up live chats, or Zoom delivery of these services. It will not replace personal delivery but could be used in a complementary way to increase access frequency for participants in rural and remote settings.

#22**COMPLETE**

Collector:	Web Link 1 (Web Link)
Started:	Tuesday, October 10, 2023 11:23:28 AM
Last Modified:	Tuesday, October 10, 2023 1:43:35 PM
Time Spent:	02:20:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	borrowing more time
Second	partnership with the vendor for free devices
Third	laptop, IPADS , tables with good access. Not internet App

#23

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:37:32 AM
Last Modified: Tuesday, October 10, 2023 2:53:30 PM
Time Spent: 04:15:58

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	funders
Second	potential partners
Third	stakeholders

#24

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 2:51:27 PM
Last Modified: Tuesday, October 10, 2023 3:02:47 PM
Time Spent: 00:11:20

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	make the non-recurring funding a recurring and higher amount
Second	develop better collaboration with AT/disability stakeholders
Third	serving rural areas

#25

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:39:19 AM
Last Modified: Tuesday, October 10, 2023 3:29:52 PM
Time Spent: 03:50:33

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	Successful public awareness campaigns to promote the benefits of assistive technology devices and services
Second	Well equipped and accessible assistive technology demonstration and loan centers with additional funding for Satellite centers to improve access to underserved counties
Third	Create and share established collaborations with local disability organizations, healthcare providers, educational institutions, and government agencies across the state with regional centers to facilitate increased opportunities for collaborations with regional centers and increased access to assistive technology services provided by FAAST

#26

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 12, 2023 11:09:30 AM
Last Modified: Thursday, October 12, 2023 11:38:01 AM
Time Spent: 00:28:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q4

OUTSIDE THE ORGANIZATION: What are the most important external challenges that FAAST must overcome in order to increase the positive impact and effectiveness of our work in the next two years?

First	being a lesser known resource
-------	-------------------------------

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 12:40:41 PM
Last Modified: Tuesday, September 26, 2023 12:52:04 PM
Time Spent: 00:11:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **Larger Funding**
 2. **More Involvement**
 3. **NHLP separation**
-

#2

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 1:16:31 PM
Last Modified: Tuesday, September 26, 2023 1:27:06 PM
Time Spent: 00:10:35

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **The recognition of FAAST as the main resource of State AT**
 2. **Self sufficient - (unrestricted funding)**
 3. **Increase presence in Regional Centers & Conferences.**
-

#3

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 4:44:17 PM
Last Modified: Tuesday, September 26, 2023 4:54:41 PM
Time Spent: 00:10:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **No hesitation from the community to learn.**
 2. **Sharing knowledge of accommodations with more people with disabilities.**
 3. **A higher budget.**
-

#4

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 9:13:31 AM
Last Modified: Thursday, September 28, 2023 10:03:47 AM
Time Spent: 00:50:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **#1 Assistive Technology & Services Go To Organization in Florida**
 2. **FAAST hosts Annual Fundraising Event simultaneously at all locations - in person or online**
 3. **Identify Legacy Donors - Endowments**
-

#5

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 3:04:34 PM
Last Modified: Thursday, September 28, 2023 3:09:44 PM
Time Spent: 00:05:10

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **growth of existing programs so we can assist more residents**
-

#6

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Sunday, October 01, 2023 4:47:23 PM
Last Modified: Sunday, October 01, 2023 5:06:46 PM
Time Spent: 00:19:22

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **Larger Budget**
 2. **Inside Organizational Stability**
 3. **Increase in number or Floridians assisted**
-

#7

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 9:56:40 AM
Last Modified: Tuesday, October 03, 2023 11:20:04 AM
Time Spent: 01:23:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

Respondent skipped this question

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

#8

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 10:22:05 AM
Last Modified: Tuesday, October 03, 2023 12:04:17 PM
Time Spent: 01:42:12

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **A growing and happy team that supports each other and each RDCs strengths and counties.**
-

#9

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 12:07:25 PM
Last Modified: Tuesday, October 03, 2023 12:41:11 PM
Time Spent: 00:33:45

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **RDCs would have latitude and funding to provide services through both direct means in the centers and through creatively offered extension programming to address service-delivery needs in far reaching areas (e.g., ECHO Model)**
 2. **FAAST equipment inventories would be adequately refreshed in the ongoing through both purchasing inventory and perhaps more creative leasing options as well.**
 3. **Floridians would have broad awareness of FAAST and the services it can offer to support individuals with disabilities, their families, and service providers.**
-

#10

COMPLETE

Collector: Web Link 1 (Web Link)
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Last Modified: Tuesday, October 03, 2023 1:29:22 PM
Time Spent: 01:22:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **FAAST should be the leader for AT in the state. This would involve being an authority on current and emerging technology, leading AT programs and initiatives, and being a resource to the related community, including other organizations and professionals.**
 2. **Increasing RDC operational budgets to allow for greater RDC staffing and dedicated team members who can travel to distant locations and provide things like in-home services for those that can't travel and for whom telecommunications are not possible.**
 3. **All FAAST team members have achieved AT competency (for example, ATP) and use current language and models when discussing AT with the public.**
-

#11

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 5:33:45 PM
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Time Spent: 00:52:04

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **permanent funding increase**
 2. **expand publics knowledge of FAAST**
 3. **maintain our mission**
-

#12

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 11:01:36 AM
Last Modified: Wednesday, October 04, 2023 11:16:51 AM
Time Spent: 00:15:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. More partnerships with outside organizations
 2. Stronger marketing efforts from FAAST
 3. Easier way to access AT when a clients needs an item that isn't available and needs to be purchased.
-

#13

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 1:12:33 PM
Last Modified: Wednesday, October 04, 2023 1:26:41 PM
Time Spent: 00:14:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. FAAST is a 'household name' in the Florida disability community. We are the resource for all things AT for persons with disabilities.
 2. FAAST conducts or outsources AT evaluations with RESNA/ATP professionals across our state.
 3. FAAST has a wide range of followers on social media and active engagement with end users
-

#14

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 05, 2023 9:10:13 AM
Last Modified: Thursday, October 05, 2023 9:28:34 AM
Time Spent: 00:18:21

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. Lobbying efforts for more money and greater recognition with other social work organization in FL
 2. increased awareness of the FAAST program
 3. Highlighting FAAST as a valuable program from state officials
-

#15

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 9:57:02 AM
Last Modified: Friday, October 06, 2023 10:31:56 AM
Time Spent: 00:34:53

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. Continuation of programs
 2. Expansion of programs and services
 3. Continuation of evolvment in the area of Smart AT options
-

#16

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 4:58:34 PM
Last Modified: Friday, October 06, 2023 5:27:17 PM
Time Spent: 00:28:42

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

- | | |
|----|---|
| 1. | All RDC's have a robust inventory and are well trained in the AT in their libraries. |
| 2. | FAAST is well known throughout the state as the go-to for AT |
| 3. | We have developed consistent fundraising efforts and are successful in those efforts. |
-

#17

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:34:16 AM
Last Modified: Tuesday, October 10, 2023 10:54:44 AM
Time Spent: 00:20:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

- | | |
|----|--|
| 1. | RDC/RRC's spread more public awareness |
| 2. | More staff as needed |
-

#18

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:17:35 AM
Last Modified: Tuesday, October 10, 2023 11:34:46 AM
Time Spent: 00:17:11

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **Full representation ALL People from all walks of life**
2. **Growth**
3. **Additional funding**

#19

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:38:35 AM
Last Modified: Tuesday, October 10, 2023 11:45:51 AM
Time Spent: 00:07:16

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **More consumers having and utilizing AT**

#20

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 12:24:54 PM
Last Modified: Tuesday, October 10, 2023 12:30:51 PM
Time Spent: 00:05:56

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

Respondent skipped this question

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

#21

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:10:11 AM
Last Modified: Tuesday, October 10, 2023 12:46:39 PM
Time Spent: 01:36:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **FAAST will operate best when people with disabilities are engaged in the innovation process.**
 2. **FAAST at the state level will act as a conduit to innovation by collaborating and providing training to external organizations in areas such as AT in aging care, healthcare and employment.**
 3. **FAAST participating in trials and research of AT prototypes by tracking outcomes while providing needed AT to consumers.**
-

#22

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:23:28 AM
Last Modified: Tuesday, October 10, 2023 1:43:35 PM
Time Spent: 02:20:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. **Success with be close to the community**
 2. **awareness for all**
 3. **loan program for more people low income, or families with disabilities**
-

#23

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:37:32 AM
Last Modified: Tuesday, October 10, 2023 2:53:30 PM
Time Spent: 04:15:58

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. All Floridians with disabilities has access to the assistive technology they need to live a fulfilling life
 2. Increased awareness of FAAST across the state
 3. Strengthened relationships with community partners and stakeholders
-

#24

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 2:51:27 PM
Last Modified: Tuesday, October 10, 2023 3:02:47 PM
Time Spent: 00:11:20

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. secure higher funding allows for additional services
 2. FAAST is the AT resource for families and organizations - assisting through the lifecycle and providing info on all AT resources
 3. fully engaged ATAC with all needed member slots filled
-

#25

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:39:19 AM
Last Modified: Tuesday, October 10, 2023 3:29:52 PM
Time Spent: 03:50:33

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. YouTube channel with video demonstrations of all core equipment that can be shared with the RDC's
2. Presentations and webinars that can be used by RDC's to present to specific groups- for example- AT to promote inclusion and participation in the classroom, assistive technology to increase productivity at work, educational technology, home automation to promote independence, AT to help seniors age in place etc...
3. A team of dedicated and experienced professionals with diversified expertise in assistive technology and disability services respected as the go to organization for assistive technology services across the state.

#26

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 12, 2023 11:09:30 AM
Last Modified: Thursday, October 12, 2023 11:38:01 AM
Time Spent: 00:28:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q5

YOUR VISION FOR THE FUTURE: What does success for FAAST look like on December 31, 2025?

1. making sure that every consumer knows about what FAAST
2. does even if they do not have a disability.

#1

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 12:40:41 PM
Last Modified: Tuesday, September 26, 2023 12:52:04 PM
Time Spent: 00:11:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

More staff

#2

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 1:16:31 PM
Last Modified: Tuesday, September 26, 2023 1:27:06 PM
Time Spent: 00:10:35

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

none at this time

#3

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, September 26, 2023 4:44:17 PM
Last Modified: Tuesday, September 26, 2023 4:54:41 PM
Time Spent: 00:10:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

n/A

#4

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 9:13:31 AM
Last Modified: Thursday, September 28, 2023 10:03:47 AM
Time Spent: 00:50:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

What equipment are potential receipt's asking to loan that we do not have access to?

Cost of shipping devices - are we getting best prices/discounts?

#5

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, September 28, 2023 3:04:34 PM
Last Modified: Thursday, September 28, 2023 3:09:44 PM
Time Spent: 00:05:10

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#6

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Sunday, October 01, 2023 4:47:23 PM
Last Modified: Sunday, October 01, 2023 5:06:46 PM
Time Spent: 00:19:22

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#7

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 9:56:40 AM
Last Modified: Tuesday, October 03, 2023 11:20:04 AM
Time Spent: 01:23:23

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#8

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 10:22:05 AM
Last Modified: Tuesday, October 03, 2023 12:04:17 PM
Time Spent: 01:42:12

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#9

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 12:07:25 PM
Last Modified: Tuesday, October 03, 2023 12:41:11 PM
Time Spent: 00:33:45

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

We appreciate headquarters partnering with RDC personnel to work toward the same goals collaboratively. We can magnify our impact when we work together. Thank you.

#10

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 12:06:51 PM
Last Modified: Tuesday, October 03, 2023 1:29:22 PM
Time Spent: 01:22:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

The opportunities to engage are always appreciated. Perhaps planning meetings that include primary participants, such as RDCs, to engage in thoughtful discussion would continue to build upon these points.

#11

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 03, 2023 5:33:45 PM
Last Modified: Tuesday, October 03, 2023 6:25:50 PM
Time Spent: 00:52:04

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

No

#12

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 11:01:36 AM
Last Modified: Wednesday, October 04, 2023 11:16:51 AM
Time Spent: 00:15:15

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

Please consider asking VR for an increase in the budget to offset inflation costs. If budgets stay flat while everything else in increasing it is actually a budget cut.

#13

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Wednesday, October 04, 2023 1:12:33 PM
Last Modified: Wednesday, October 04, 2023 1:26:41 PM
Time Spent: 00:14:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

Glad to be part of the team! Looking forward to our plan for the next 2 years.

#14

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 05, 2023 9:10:13 AM
Last Modified: Thursday, October 05, 2023 9:28:34 AM
Time Spent: 00:18:21

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#15

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 9:57:02 AM
Last Modified: Friday, October 06, 2023 10:31:56 AM
Time Spent: 00:34:53

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

We have seen improvement in systems to capture reporting requirements. Which have resulted in easier usage and more concise while limiting to one platform.

#16

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Friday, October 06, 2023 4:58:34 PM
Last Modified: Friday, October 06, 2023 5:27:17 PM
Time Spent: 00:28:42

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#17

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:34:16 AM
Last Modified: Tuesday, October 10, 2023 10:54:44 AM
Time Spent: 00:20:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#18

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:17:35 AM
Last Modified: Tuesday, October 10, 2023 11:34:46 AM
Time Spent: 00:17:11

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#19

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:38:35 AM
Last Modified: Tuesday, October 10, 2023 11:45:51 AM
Time Spent: 00:07:16

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

No

#20

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 12:24:54 PM
Last Modified: Tuesday, October 10, 2023 12:30:51 PM
Time Spent: 00:05:56

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6 Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#21

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:10:11 AM
Last Modified: Tuesday, October 10, 2023 12:46:39 PM
Time Spent: 01:36:28

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6 Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#22

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:23:28 AM
Last Modified: Tuesday, October 10, 2023 1:43:35 PM
Time Spent: 02:20:07

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

Thank you for everyone is involve with the strategic planning. I hope everything is going well for next year's to come,

#23

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 10:37:32 AM
Last Modified: Tuesday, October 10, 2023 2:53:30 PM
Time Spent: 04:15:58

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#24

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 2:51:27 PM
Last Modified: Tuesday, October 10, 2023 3:02:47 PM
Time Spent: 00:11:20

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Respondent skipped this question

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

#25

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Tuesday, October 10, 2023 11:39:19 AM
Last Modified: Tuesday, October 10, 2023 3:29:52 PM
Time Spent: 03:50:33

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

It would be helpful if FAAST could securing additional funding to provide to RDC's to create satellite centers or hire additional staff to provide additional services to underserved counties.

#26

COMPLETE

Collector: Web Link 1 (Web Link)
Started: Thursday, October 12, 2023 11:09:30 AM
Last Modified: Thursday, October 12, 2023 11:38:01 AM
Time Spent: 00:28:31

Page 1: FAAST Strategic Planning Survey Fall 2023

Q6

Do you have any other comments, questions, or concerns for the FAAST planning team to consider?

FAAST is a great resource... Use that to your advantage.



Memorandum

TO: Assistive Technology Advisory Council

FROM: Eric Reed, Executive Director

Cc: FAAST Staff

DATE: June 22, 2023

RE: FY23 QTR 3 Strategic Plan 2020 Report

Status Key

Needs Attention	Any item that is not meeting milestones to be accomplished by target date
On Target	Any item that is not yet completed but is meeting milestones to be accomplished by target date
Completed	Any item that has been completed by target date

Strategic Issue 1

How can FAAST raise public awareness of the organization and its programs, benefits, service areas, and successes?

Goal: Increase awareness of FAAST.	STATUS
Objective 1: By December 30, 2020, appeal to the public to increase awareness to taxpayers, legislators, and the public through testimonials.	Completed



Objective 2: By September 30, 2022, increase awareness of FAAST to partner organizations and businesses.	Completed
Objective 3: By September 30, 2023, have a statewide presence as the primary resource for Assistive Technology.	On Target
Objective 4: By December 31, 2021, update marketing materials for consumers to better understand FAAST services and what to expect.	Completed

Note: Creation of marketing materials / digital marketing flyers for different FAAST services are in process through the TAC and on target.

Strategic Issue 2

How can FAAST expand its capacity to reach all Floridians while maintaining a quality and equitable level of service?

Goal: FAAST serves all Floridians through a quality and equitable level of service.	STATUS
Objective 1: By September 30, 2021, FAAST will research and establish an updated service delivery model for Regional Demonstration Centers.	Completed
Objective 2: By September 30, 2022, FAAST will create, develop, and establish an online Training Resource page on the FAAST website.	On Target
Objective 3: By September 30, 2021, FAAST will create more collaboration amongst RDCs and RRCs.	Completed
Objective 4: By September 30, 2022, evaluate and adjust AT List.	Completed



Objective 5: By September 30, 2022, FAAST will implement the update service delivery model for RDCs.	Completed
Objective 6: By September 30, 2021, September 30, 2022, and September 30, 2023, create annual legislative priorities to implement within the strategic plan.	On Target
Objective 7: By September 30, 2023, FAAST will achieve an equitable service delivery model.	On Target
Objective 8: By September 30, 2023, with support from VR and DOE, the New Horizon Loan Program will be a separate nonprofit for the purpose of a Community Development Financial Institution.	Needs Attention
Objective 9: By September 30, 2022, FAAST will research and establish an updated service delivery model for Regional ReUse Centers.	Completed
Objective 10: By September 30, 2023, FAAST will implement the updated service delivery model for RRCs.	Completed

Note: Objective 8 has been determined to not be a viable goal as VR and DOE are not in support of the separation at this time.

Conversations will continue over time as appropriate with VR leadership but the timeline indicated in the strategic plan will not be met.

Strategic Issue 3

How can FAAST address structural and operational weaknesses to improve governance, streamline operations, and pursue innovation?

Goal: FAAST to have up to date, appropriate, and responsible organizational structure and operations.	STATUS
---	--------



Objective 1: By March 31, 2021, FAAST procedural and employee manuals will be updated (i.e., accounting, personnel, NHLP, SDLP, brand, marketing, board, inventory, RDC & RRC).	Completed
Objective 2: By March 31, 2021, the FAAST inventory system will be up to date, and an annual inventory will be completed.	Completed
Objective 3: By March 31, 2021, the FAAST board and ATAC will be one body and the Public Policy and Advocacy and Interagency Committee to be separated into two committees as reflected in statute 413.407.	Completed
Objective 4: By September 30, 2023, FAAST will continue to ensure up to date, appropriate, and responsible organizational structure and operations.	Completed



UNITING BY DESIGNSM

Wise Planning

A Strategy Guide for Organizations

Updated, December 2022

Mark D. Bennett, Principal

mark@unitingbydesign.com

www.unitingbydesign.com

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I am committed to sharing these tools to encourage wise planning and practical efforts to increase organizational integrity, health, and effectiveness.

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www.unitingbydesign.com

Contact Mark D. Bennett mark@decisionres.com

Basics of Wise Planning

Wise strategic planning is a cornerstone practice of healthy, resilient organizations in all sectors (corporate, nonprofit, and government). Planning together provides a valuable opportunity for the organization to step back, (re)envision its desired future, think through the challenges that lie ahead, and make a firm commitment to realize future success.

To be strategic requires what pilots call, “flying ahead of the plane.” It is intelligent to consider the existing and emerging conditions that lie months or years ahead. Planning that focuses on matters of fundamental importance to organization survival and success is strategic, even if the planning horizon is short-term.

However, **wise** strategic planning begins with the WHY of mission, values, and principles to confirm or reexamine these foundation components. Then, the strategic conversation clarifies the big picture (HOW to approach the future) before figuring out the plan of action (WHAT specifically will be done to move forward). To be strategic is to carefully choose the HOWs, i.e. do the right things. Then, it is important to do these things right, by selecting the WHAT. “Are we doing the right things?” is the strategic question. “Are we doing these things right?” is an action-oriented, tactical question.

Effective strategic thinking should answer four interconnected questions to produce an intelligent plan and execute the plan with commitment, courage, and creativity. The answers to these questions should be a dialogue that harnesses the power of diverse perspectives. With enhanced perspective you can develop a good understanding of the internal organization environment and the external operating environment.

WHERE are we now as an organization?

- Are we clear on our mission (**WHY WE DO WHAT WE DO**), core values (**WHY WE CARE**), and guiding beliefs (**TRUTHS SHAPING HOW WE SEE OUR WORK**)
- Do we really understand the state of the organization (current performance, lessons learned, internal problems, strengths to leverage)?

WHAT do we understand about the reality of our operating environment, now and in the near future?

- *What challenges and opportunities can we anticipate and prepare to address?*

WHAT vision do we want to achieve?

- What is our enduring, permanent vision about a changed ‘world’?
- What is our vision at the 2-3 year planning horizon of a future state of success?

HOW will we get there?

- What capabilities will we need to reach our vision?
- How will we focus our efforts with the right goals, objectives, and actions?
- How will we assure successful execution? (assessment of progress, course correction when needed, and adaptation to changed circumstances)

Recognize the Value of Wise Planning

It is important to clarify the necessity for your organization to invest the time, energy, and money to develop a useful plan that will provide the “blueprint” for your efforts in the near future. Most groups choose a planning horizon of 3 years. Consider the following questions:

Do you need to be credible when approaching funders, donors, and sponsors who provide critical financial support to your organization? Most knowledgeable funders want to be assured that their support will make a difference. Wise planning is credible evidence that the organization knows where it is going, has the capacity to adapt to the inevitable changes ahead, and will make effective use of their resources. Planning demonstrates good stewardship.

Are your operational efforts carefully focused and delivering superior outcomes that fulfill your mission? Three common characteristics of successful organizations are alignment, leverage, and agility. The work of the organization fits together. Different aspects of the organization complement each other. The organization takes full advantage of its strengths (leverage) to deliver the most mission impact with limited resources. And finally, the organization can “pivot” together to adapt to unpredictable developments.

Do your governing board, leadership, and staff have a unified understanding of the organization's WHY, HOW, and WHAT? Wise planning enables everyone to be on and remain on the “same page.” Unity is a powerful, tangible quality that magnifies the collective effort to fulfill the mission.

When you recruit new board members, leaders, and managers, how do you effectively orient them to the organization's identity and approach? People are the most valuable resource for your organization. Their talent, commitment, and creativity provide the vital force for all that the organization can and will do. It is critically important to recruit and retain the right people. When you share your clear understanding about approach, strategy, and vision with a desirable candidate for the Board or Staff, you demonstrate that the organization is on a successful trajectory. The best people want to be part of an organization that is on-the-move. Also, when others understand your plan and choose to join you, they are well-aligned from the beginning.

Do you have a static plan sitting on a shelf in a binder or are you engaged in an ongoing process of strategic conversation to adapt and navigate wisely toward the vision? Organizations can become stale and habitual in their operational patterns. Successful organizations are constructively dissatisfied. An agile organization is adaptable and responsive, learning constantly and tailoring what it does to improve results in a dynamic operational environment. Dialogue is necessary to draw forth the best thinking and creative ideas of others to (re)vitalize the organization's collaborative efforts.

Address Barriers to Wise Planning

Many “strategic” planning efforts do not live up the name. WISE planning is a better statement of what organizations should aspire to produce when they invest in the design of their future success. Wise planning is a dynamic process of strategic conversation over time, not the creation of a nicely-bound, static plan document. In order to be strategic, planning must intelligently anticipate the challenging realities of the organization's environment. In order to be wise, planners must also discern the best way to honor the mission, integrate strategy, goals, and action with guiding values and principles, respect the needs and concerns of stakeholders, and creatively leverage limited resources. Too often “strategic” planning processes are half-hearted, poorly designed, and partially executed. A complete plan has all the elements described on page 9.

Some key preparation will avoid common mistakes in the planning process.

Poor Design Begin with an honest assessment of the key elements of the organization's current plan. A new plan may require all the elements of a full plan, or only parts may need to be updated when previous work provides a sound foundation. Typically, a small core planning team (CPT) can use the *Design the Planning to Succeed* worksheet on the next page.

- Assess the need, scope of the effort, and **level of commitment** by leadership.
- Identify **necessary participants** and others to be consulted.
- Assemble the **resources needed** to implement an effective planning process.

Absence of Key Perspectives Wise planning requires thorough consideration of a range of issues and important values. A candid, 360° discussion is fundamentally important. The right people with diverse perspectives need to be in the room (or consulted in a meaningful way) AND feel safe enough to express themselves. Wise planning depends upon practical foresight about what is coming and collective wisdom about what to do.

- Include **diverse perspectives** to eliminate blind spots, test assumptions about current plans, and determine HOW the organization should move into the future.
- Solicit targeted **input from stakeholders** who do not participate directly through surveys, individual interviews, focus groups, or questionnaires.
- Develop a practical agenda and use guidelines for discussion that establish a safe, **respectful climate for dialogue** and creative exploration.

Flawed Execution Beautifully written plans sometimes sit on a shelf. The complexity and velocity of the world makes fixed plans outdated. The planning process should clearly lay out HOW the plan will be reviewed, assessed, and adapted as needed to reorient and keep moving forward. Commitment must be firm.

- Establish useful metrics, performance measures, or indicators and determine how you will gather the intelligence needed to assess progress.
- Update a “blueprint” or other structured review document periodically to inform participants and other important stakeholders of the planning progress and adaptations. Communication is necessary to establish accountability.
- Schedule periodic review “loops” to assess, reorient, decide about course correction, and act.

Design the Planning to Succeed

Clarify the 'Value Proposition' What are the specific take-aways and intended outcomes of the wise planning process that justify the time, effort, and cost of the planning?

Provide Appropriate Context What factors in the organization's history, current situation, and operating environment indicate a need for strategic planning now? Build commitment for the effort with a clear explanation.

Get the Right People There and Ready to Participate Who has necessary perspective to contribute to a comprehensive dialogue about mission, values, vision, the operating environment, stakeholder concerns, and the strategic path to success?

- Who will not participate but should be consulted so their concerns are represented?
- How much notice do participants need?
- What information should be developed and sent to participants before the meeting?
e.g. copy of existing strategic plan, copy of existing strategic plan of parent organization, stakeholder survey, background on key trends in the operating environment, forecasting/futures analysis from credible sources, current organization financial status and projections.

Make Necessary Arrangements Do we need a facilitator? Why or why not?

How should the agenda be structured? How much time and how many planning sessions will be needed?

What logistics need to be addressed? (convenient, suitable space that can be configured for large & small group discussion, wall space for visual display of ideas and “group memory,” refreshments, supplies, audio-visual equipment, copies of reference materials)

Structure Follow Through and Accountability How will we handle communication of the outcomes to participants and others that need to know?

How will we follow through to execute the plan, assess progress, and correct course as needed?

Use a Common Language for Planning

Action plan – a plan for achieving goals and objectives that identifies specific tasks, sets deadlines, and assigns responsibility.

Goal – a desired result, target or direction for the organization that clarifies what to accomplish. Goals can be long term (several years) or short term (less than one year). A 'stretch' goal is a bold marker that may exceed what you believe to be attainable. This encourages the innovation and resourcefulness of the organization over time.

Mental Models – images, assumptions, and stories that influence the way we see every aspect of our world. Mental models function as cognitive maps which we use to guide us as we navigate forward and explain our world to ourselves and others.

Milestone – a significant date or event during the execution of a plan that requires the attention of implementers and reviewers.

Mission Statement – a concise declaration of WHY the organization exists. This may include who it serves, why it is unique, why it makes a difference for those it serves, or where it operates.

S.M.A.R.T. Objective – a key accomplishment or checkpoint on the way to a major goal. (Specific, Measurable, Achievable, Relevant, Time-bound)

Performance Measures – criteria used to assess results of the planning process. These criteria may include quantitative and qualitative measures. Other commonly used terms for these measures include: "Success Indicators," "Key Performance Indicators," "Metrics," "Key Results" or "Benchmarks"

SPOC-K Analysis - a version of a SWOT, a common strategic planning exercise to examine the internal and external environments. Internal: **S**trengths & **P**roblems External: **O**pportunities & **C**hallenges]. With this **K**nowledge, the organization can develop strategies to respond, e.g. how to leverage strengths, resolve problems, take advantage of opportunities, or meet challenges.

Stakeholder – any person, group, or entity that can place a claim on the organization (focus, resources, or output) or is affected by what the organization does

Strategic/Strategy - Strategic means *essentially related to long-term success*. A strategic plan may cover a period as short as one year or as long as ten years. It is strategic because it is designed to move the organization toward long-term success. A strategy is an approach to address or resolve one or more important issues. A strategy statement is a succinct explanation of the reasoning about the current and near-future operating environment that results in the choice of strategic goals and approaches that are most likely to realize the vision of success.

Tactic – specific operational approach used to carry out a strategy

Values – basic beliefs and principles used by individuals and organizations to define importance, communicate what matters, establish standards for behavior, set priorities, and make decisions

Vision – a clear image of a desired future state that an organization wishes to become true. A vivid, compelling vision provides a big picture that helps everyone see how they fit in. There is useful tension created between the present (the world as it is) and the future (the world as it might be). A vision can challenge and motivate because, though bold, it seems possible when supported by effective planning and execution. A compelling vision can *pull* people together and forward.

Wise Planning Requires a Dialogue Among Perspectives

Most key communication is not dialogue. This is particularly planning. There may be tensions and significant differences between individuals and groups. The most common form of communication amidst differences is debate. Debate assumes a win-lose outcome and often focuses on attacking or knocking down the arguments and positions of the other 'side.' The root of the word is the French verb 'debattre,' meaning to beat upon. While it is possible to maintain a climate of healthy, civil debate, there is an inherent tendency in the dynamics of a debate for it to become an argument and for an argument to turn into adversarial communication that lowers the psychological safety of the climate and decreases the willingness of some to share their ideas and concerns.

Dialogue is the gold standard for conversation that builds collaboration and enables people to maximize learning together. The word is formed from the root words 'dia' and 'logos,' and indicates the exchange of meaning through the word. The intention that guides a dialogical exchange is a deeper conversation that:

- respectfully engages different perspectives,
- develops improved individual and shared understanding,
- clarifies what is most important,
- forges connections between people and their ideas, and
- surfaces possibilities.

Dialogue requires discipline to avoid predictable argument and debate behavior that may only reproduce the same level of understanding that already exists. Wise planning depends on clear discussion and full understanding of the situation, stakeholders, values, options, and risks.

Argument, poor listening, and conflictual behavior tend to produce 'noise' that can interfere with the clear communication necessary. These guidelines will create and sustain a climate for dialogue that generates understanding and maintains constructive working relationships.

Adopt a Listen/Learn Mindset Listen generously with the intent to learn rather than confirm what you already believe or find a weakness in another's position.

Offer No Frills Respect Always treat others with basic respect, especially when the issue is tough and even if you don't like someone. You don't have to RESPECT someone. You do need to show positive regard for others' dignity.

Maintain the Conversational Air Space Only one person talks at a time. Don't talk over others or cut them off. Avoid cross-talk

Speak to be Understood Don't beat around the bush. Speak directly and honestly to what you believe is important. Be brief so others have a full opportunity to speak

Inquire to Understand Ask open and honest questions that invite others to clarify their views and increase your understanding of their goals, needs, and concerns.

Share the Back Story If you have a strong position, share it AND describe the reasoning that led you to this opinion, recommendation, or conclusion. When positions seem to be in conflict, stories can offer perspective.

Manage the Temperature Level Be candid without aggression. Express disagreement directly and cleanly without any personal attack, sarcasm, or negative characterization of others' motives, beliefs, or ideas.

Connect the Dots Link ideas and highlight common threads and areas of possible agreement.

Assess Your Organization's Skill With Dialogue

5= We do this well
1= We do this poorly

Adopt a Listen/Learn Mindset Listen generously with the intent to learn rather than confirm what you already believe or find a weakness in another's position.

Offer No Frills Respect Always treat others with basic respect, especially when the issue is tough and even if you don't like someone. You don't have to RESPECT someone. You do need to show positive regard for others' dignity.

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Inquire to Understand Ask open and honest questions that invite others to clarify their views and increase your understanding of their goals, needs, and concerns.

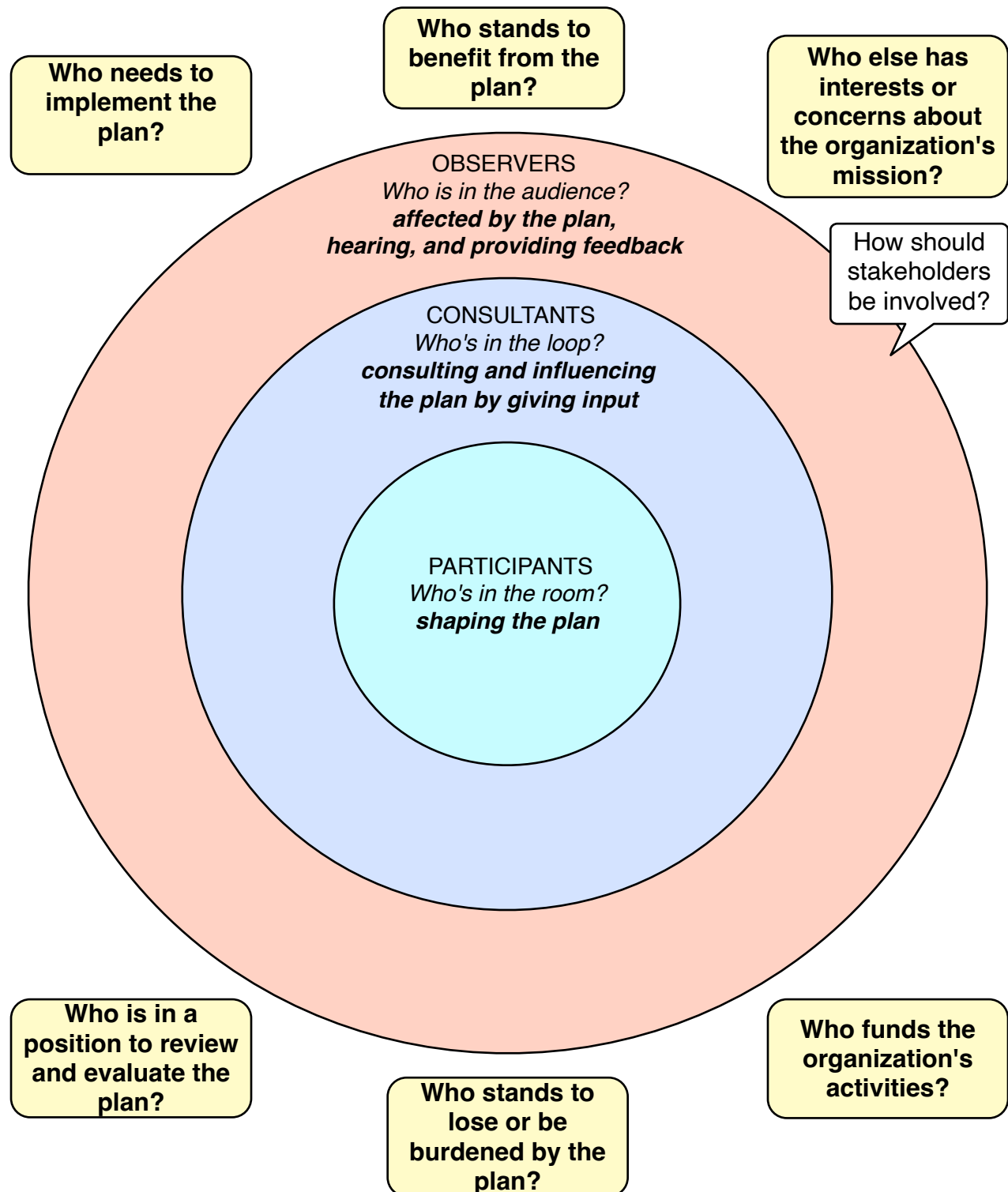
Share the Back Story If you have a strong position, share it AND describe the reasoning that led you to this opinion, recommendation, or conclusion. When positions seem to be in conflict, stories can offer perspective.

Manage the Temperature Level Express disagreement directly and cleanly without any personal attack, sarcasm, or negative characterization of others' motives, beliefs, or ideas.

Connect the Dots Link ideas and highlight common threads and areas of possible agreement.

Identify and Engage Stakeholders at the Right Level

A wise plan involves the right people, in the right way, and at the right time. Consider the stakeholders in the outside boxes. Where will they be in these circles of involvement? Usually a small, core group oversees and coordinates the planning process.



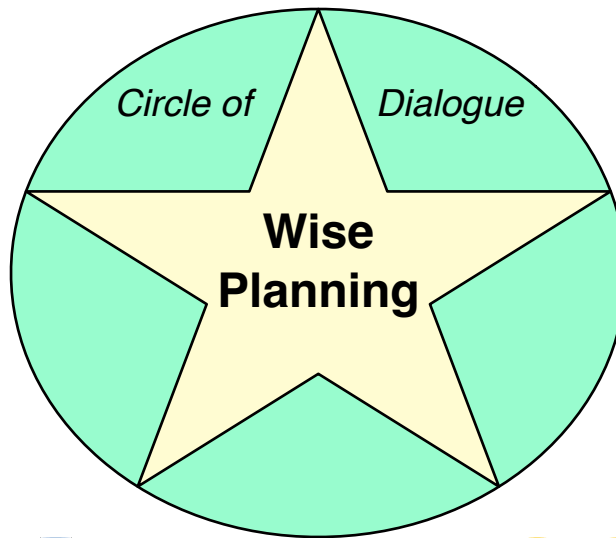
Recognize the Key Elements of Wise Planning

When participants develop each element of the plan with an understanding of the way each informs the others, the planning dialogue generates a well-integrated road map that unifies the effort and engages the stakeholder support that will ensure success.

SHARED VISION A clear, compelling image of the desired future state pulls everyone forward and sustains commitment.



ACTIONABLE GOALS A small set of strategic priorities shape the path forward, focus the collaborative effort with supporting objectives, and action steps, and develop leverage.



UNDERSTANDING THE ENVIRONMENT Comprehension of the situational dynamics (trends, risks, uncertainties, opportunities) guides the choice of strategies.



CLEAR MISSION Purpose (Intention) sets general direction and is a magnetic force that pulls people together.



GUIDING VALUES & PRINCIPLES Mission and guiding values form the ethical heart of the effort and affirm the organization's identity.

Prepare to Write an Effective Mission Statement

No one gets lost on a straight road.
Native American proverb

WHAT is a Mission Statement?

A mission is a succinct declaration of the organization's enduring purpose or 'reason for being.' It acts as a compass to provide direction and let others know where the organization is headed. It is also a statement of commitment and a promise to internal and external stakeholders.

A mission is the foundation element of a set of express understandings that form the organization's blueprint for success. These usually include a vision, major goals, statement of core values and principles, basic beliefs and major policies.

A vision differs from mission in that it describes a picture of future success when the organization carries out its mission.

WHY does a mission statement help?

- Build unity throughout the organization with a consistent, clear purpose.
- Provide a foundation and useful point of reference to make major decisions and integrate short-term objectives with long-term goals
- Motivate those within the organization by clearly communicating the nature and meaning of the organization's work.
- Gain understanding and support from outside stakeholders who are important to the organization's success.

HOW do we develop our mission statement? Answer these questions.

- What is our fundamental purpose?
- What is unique or distinctive about us?
- Who do we exist to serve?
- What do they want/need from us that is important?
- How should we respond to our clients, customers, users, and other key stakeholders?
- What are our guiding values?

HOW do we know when the mission is well-crafted and useful?

ESSENCE Think....and think again about what is most important that provides the motivating direction. Ask 'WHY?' several times to get to the heart of the matter.

LENGTH A mission statement can be very brief (10-15 words), but it needs to be long enough to reach the target audience(s) AND contain the emphasis (guidance) needed to help clarify priorities and illuminate tough choices. Consider this simple structure: Our mission is to _____ so that _____. Sometimes, a short mission is followed by a short set of statements that describe the programmatic ways the organization carries out the mission. "We carry out our mission by....."

TONE Find the right tone for the audience, avoiding language that is too lofty or ponderous to be taken seriously. The language should be clear and inspiring, not dry and pro forma.

AUDIENCE UNDERSTANDING Consider whether to present the mission with other key statements such as specific commitments, vision, and key values so the audience sees the 'blueprint for success.'

REGULAR ATTENTION Formally review the mission statement once a year as part of the strategic planning process, as it informs all other planning activities. Assess its usefulness and the need for changes.

Clearly Communicate the Mission to Your Stakeholders

A clear declarative sentence that affirms your reason to exist. No longer than 15 words that follow: The Mission of _____ is to..... Example: "The mission of the Nature Conservancy is to **conserve the lands and water on which all life depends.**" (Contrast with their Vision, which is.... "Our vision is to leave a sustainable world for future generations.")

1st draft

2nd draft

3rd draft

Briefly explain how you carry out the mission. *We deliver our mission by.....*

-
-
-
-
-

Do you want a short tagline or slogan that summarizes your mission in a phrase? A tagline fits at the top of a website and on other communications that communicate the organization's identity and work to general audiences. Example: "Protecting nature, for people today and future generations"

Confirm Core Values That Guide Strategic Action

Wise planning is filled with decisions that are the fundamental means for navigating forward. Through the planning process, the organization imagines the future it wants, chooses to act and charts a course that shapes what will happen.

Values are not add-ons. They are central to the organizations identity (brand) and its strategic effectiveness. When they are paired with the mission statement they identify a purposeful orientation that strives to be accountable and earn the trust of internal and external stakeholders. A values statement comes alive when it has a brief, clear definition and a set of specific “action principles” that describe behaviors that move the value into action.

An organization's mission and statement of core values are promises to employees and other stakeholders. The faithful use of these important values when making key decisions keeps a promise. Therefore, attention to the conscious, transparent use of declared values in wise planning making becomes an issue of integrity. A wise plan is a credible message to employees and stakeholders that conveys what the organization and the decision makers really value.

Consider the following example of a large, nonprofit health care organization.

RESPECT positive regard for the dignity of all persons

In working with each other, we will:

- Encourage and value the contributions of each person, and make each feel supported and empowered
- Listen well, communicate openly and honestly, and encourage others to do the same
- Treat others as we would like to be treated ourselves, relating so well with them that they actively seek to associate with us

INTEGRITY honesty, directness, and respect for commitments made

In all of our interactions, we will:

- Foster trust by being truthful, empathetic, and consistent
- Be authentic and courageous, aligning what we are thinking, saying, feeling, and doing
- Be responsible for and follow through on the commitments we make

STEWARDSHIP respectful use of natural, human and financial resources

In managing the natural, human, and financial resources to which we have been entrusted, we will:

- Seek ways to appropriately utilize resources, allowing us to become more effective and productive
- Act responsibly, taking only those actions that align with our mission
- Be accountable to the organization and to each other for our actions and the outcomes they produce

IMAGINATION creativity in all we do

In seeking to fulfill our mission, we will:

- Look beyond the challenges of the present and envision what is possible
- Cultivate and reward innovation and risk taking
- Embrace continuous learning and positive technological advancement

EXCELLENCE striving to exceed the quality, customer service and cost performance expectations of our customers

In all we do, we will:

- Put forth our personal and professional best, providing the highest quality of care of which we are capable
- Commit ourselves to continuous improvement, seeking to set the recognized performance standards within our industry
- Deliver a superior experience for all of our customers, sensing their needs and exceeding their expectations

Define Your Core Values and Guiding Principles

Name of Value (Noun) _____

Basic meaning (1-2 sentences) _____

Commitment to Action (3-4 affirmative statements) we will: (Verb)

Name of Value (Noun) _____

Basic meaning (1-2 sentences) _____

Commitment to Action (3-4 affirmative statements) we will: (Verb)

Name of Value (Noun) _____

Basic meaning (1-2 sentences) _____

Commitment to Action (3-4 affirmative statements) we will: (Verb)

The Significance of Vision

Begin with the end in mind. **Stephen Covey**

All our dreams can come true – if we have the courage to pursue them. **Walt Disney**

Leadership is the capacity to translate vision into reality. **Warren Bennis**

There is no more powerful engine driving an organization toward excellence and long-range success than an attractive, worthwhile, achievable vision for the future, widely shared. **Burt Nanus**, *Visionary Leadership*

Knowledge is love and light and vision. **Helen Keller**

If you want to build a ship, don't herd people together to collect wood and don't assign them tasks and work, but rather teach them to long for the endless immensity of the sea. **Antoine de Saint-Exupery**

I try to avoid looking forward or backward, and try to keep looking upward. **Charlotte Bronte**

A vision is not just a picture of what could be; it is an appeal to our better selves, a call to become something more. **Rosabeth Moss Kanter**

To the person who does not know where he wants to go, there is no favorable wind. **Seneca**

Keep your eyes on the stars and your feet on the ground. **Franklin D. Roosevelt**

Dissatisfaction and discouragement are not caused by the absence of things but by the absence of vision. **Anonymous**

Strategic planning is worthless unless there is first a strategic vision. **John Naisbet**

The future belongs to those who see possibilities before they become obvious. **John Scully**

Vision without action is merely a dream. Action without vision just passes the time. Vision with action can change the world. **Joel Barker**

Vision is not enough. It must be combined with venture. It is not enough to stare up the steps, we must step up the stairs. **Vaclav Havel**

If you have built castles in the air, your work need not be lost; that is where they should be. Now put the foundations under them. **Henry David Thoreau**

If you want to be happy, set a goal that commands your thoughts, liberates your energy, and inspires your hopes. **Andrew Carnegie**

If you are working on something exciting that you care about, you don't have to be pushed, the vision pulls you. **Steve Jobs**

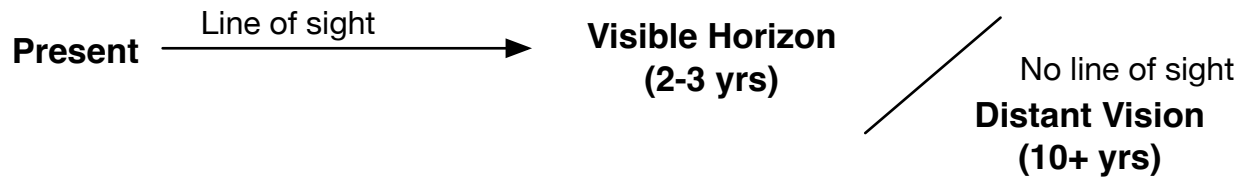
The only thing worse than being blind is having sight, but no vision. **Helen Keller**

The vision you glorify in your mind, the ideal you enthrone in your heart, this you will build your life by, and this you will become. **Anonymous**

My story is a freedom song from within my soul. It is a guide to discovery, a vision of how even the worst pain and heartaches can be channeled into human monument, impenetrable and everlasting. **Coretta Scott King**

The Moral Imagination and a Horizon Vision

The moral imagination is the capacity to recognize turning points and possibilities in order to venture into an uncertain future to create goodness that does not yet exist. Many organizations have a permanent, enduring vision about a better world. These noble statements have a certain power but their distance from the realities and challenges of the present limit how much they can motivate collective action. A horizon vision is a practical view of how the organization can look meaningfully different in a time period relevant to the lives of people working for the vision and the lives of those served. This is usually 2-3 years.



Vision Notes

Horizon Vision Images

What values guide and inspire your collective action?

What is the distant vision for a changed world? How can you chunk this large vision down to some important, visible pieces?

When you think that success looks like in 2-3 years, what do you SEE?

Craft a Shared Vision of Success

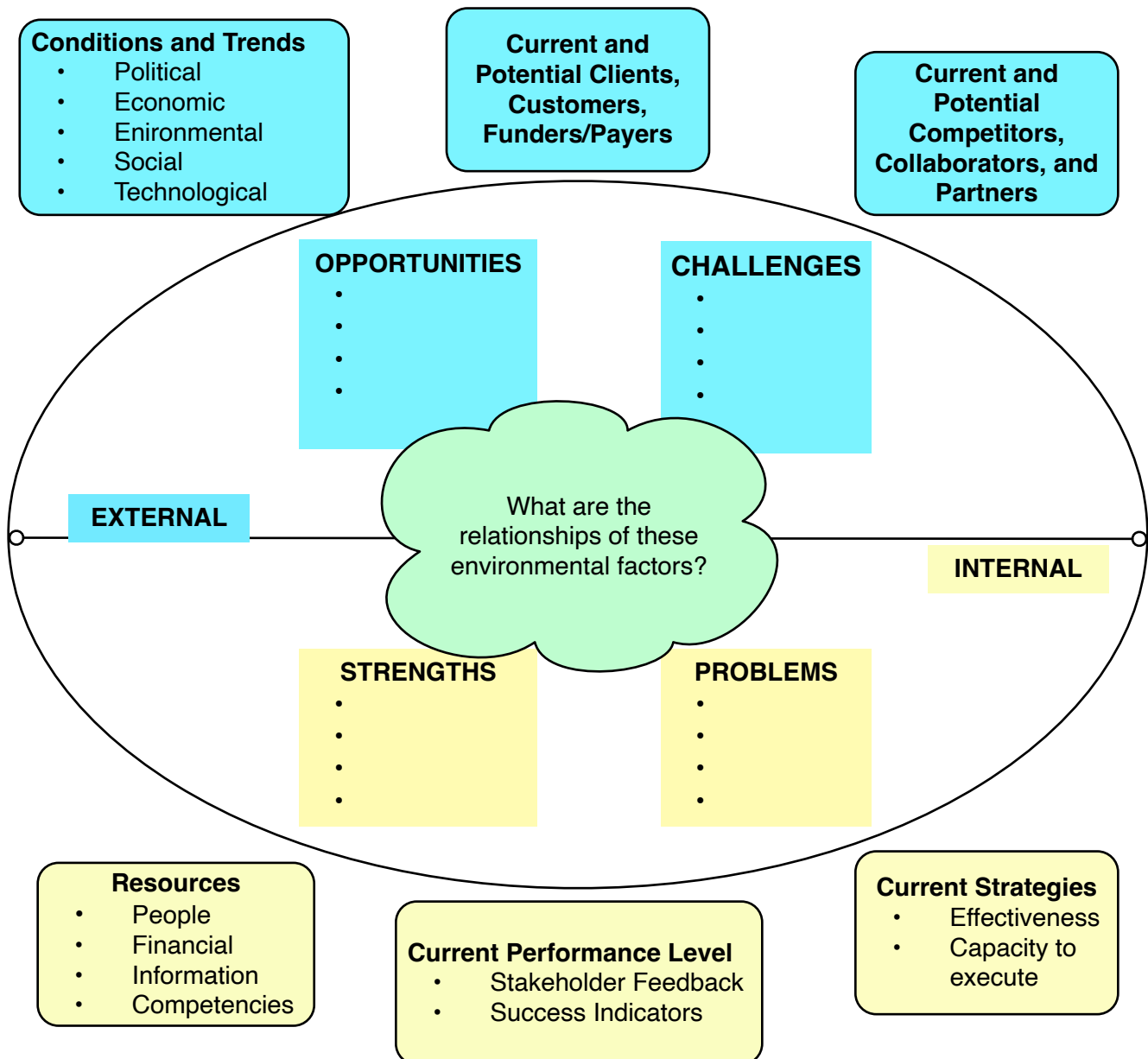
1. Pick a vision horizon of 2-3 years
2. State in present as if it exists
3. Often a vision is not one thing, but a set of images about how the organization will look different. These images form a mosaic picture of a desired future.
4. Use language that is detailed and image rich
5. Describe what goal success looks like
6. Make it bold, challenging, AND possible so it “pulls” everyone together and “pulls” the organization forward.

**VISION
(Destination)**



Map the Operating Environment

It is essential to have a comprehensive, clear-eyed understanding of the environmental realities within the organization (internal/yellow), and outside the organization (external/blue) where it must engage stakeholders and deliver mission performance. What factors are important and should be considered? Do these factors present as helpful (strengths, opportunities) or difficult (problems/weaknesses, challenges/threats) in relationship to the organization's ability to fulfill its mission and realize its vision? How do these factors relate or interact (green) to suggest strategic issues that the organization should address in the planning?



Assess the Operating Environment

All the major elements useful to frame strategic goals tend to present as GREEN (what could help us move forward) and RED (what could slow us down or stop us). These elements also sort into the organization's internal environment (Strengths and Problems) and external environment (Opportunities and Challenges). It is important to develop a clear perspective of the present and near-future (1-2 years). In addition to leaders and others on the core planning team, it is useful to seek the perspective of employees and other organization stakeholders about their responses to these four questions.

E
X
T
E
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OPPORTUNITIES
(favorable conditions, developments,
potential partners, new resources)

What is present or emerging outside the organization in the next ____ years that can help us succeed with our mission?

CHALLENGES
(competitive threats, roadblocks,
restraining conditions)

What is present or emerging outside the organization in the next ____ years that could make it more difficult to succeed with our mission ?

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STRENGTHS
(assets, advantages, capabilities,
resources)

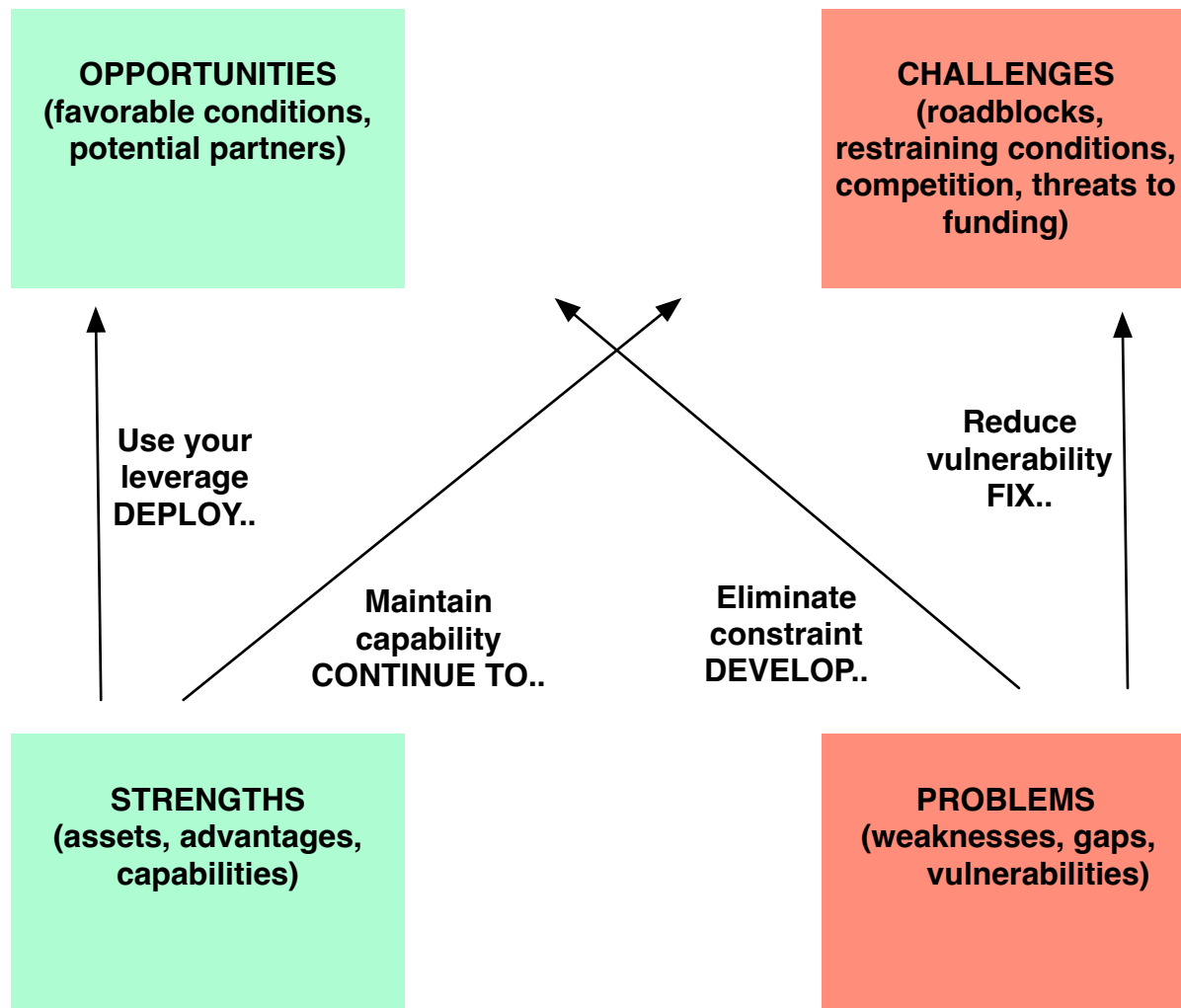
What are the most important strengths that enable us to successfully carry out our mission in the next ____ years, take advantage of external opportunities, and meet external challenges?

PROBLEMS
(weaknesses, gaps, concerns,
vulnerabilities)

What are the most important problems that limit the ability to carry out the mission successfully in the next ____ years, take advantage of external opportunities, and meet external challenges?

Strategic Dynamics in the Operating Environment

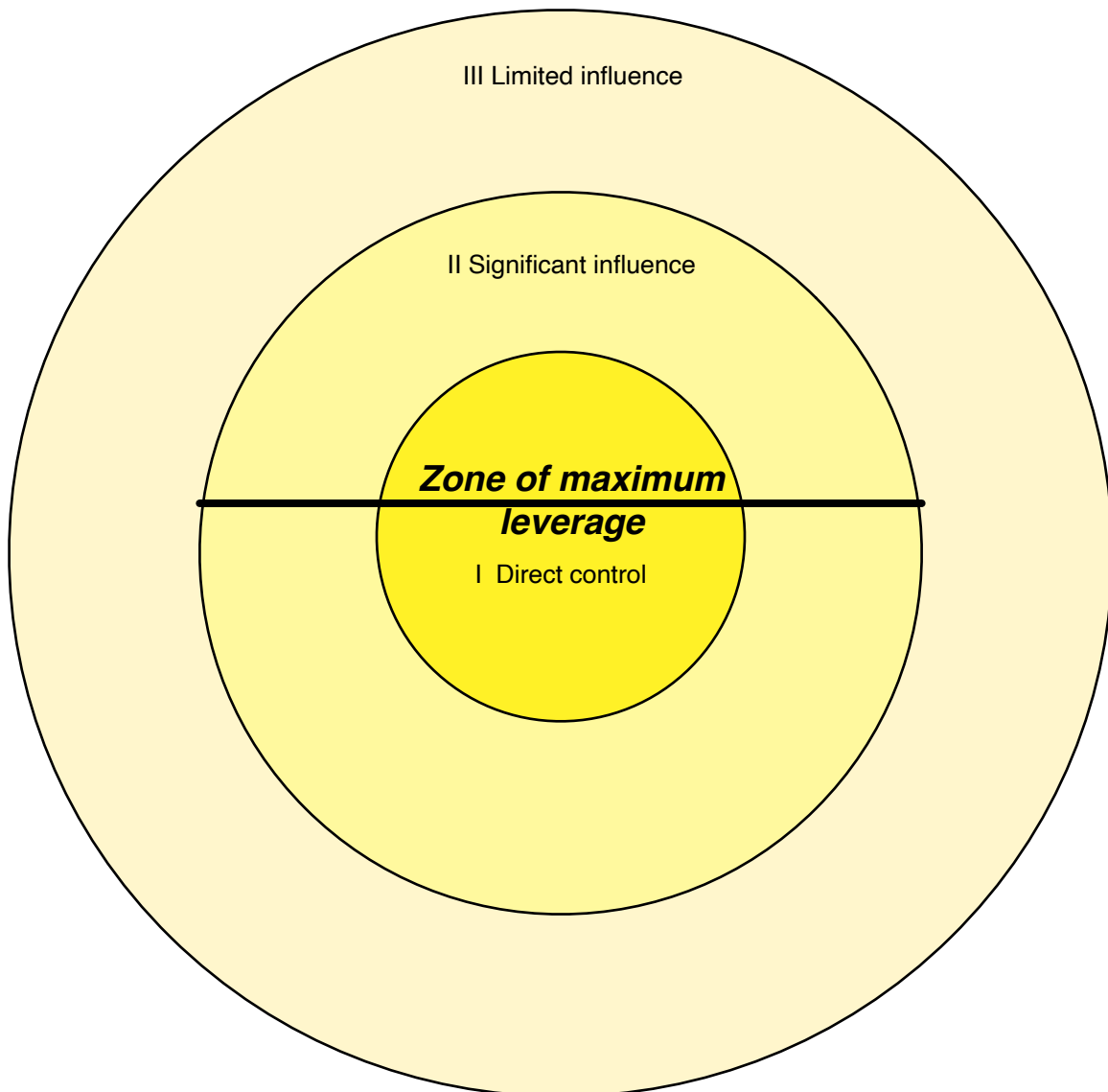
While there are many variations on strategy, there are only a few types of relationships that merit strategic response. Look for dynamic connections among the four categories. Consider whether your organization has the ability to act. Effective strategy is as much about refraining from doing as doing. When your organization acts and invests its limited resources of time, money, and leadership to focus on a goal, this choice to act should have sound reasoning based on your clear-eyed understanding of the current situation and the near future.



Consider the Zone of Influence for Effective Strategic Action

Successful organizations apply the principle of **leverage**. They focus their human and material resources on a few important strategic goals and objectives that address the issues that a. they can influence and b. offer the prospect of the greatest impact upon their mission. A meaningful strategic conversation candidly assesses the capacity for influence and the likely mission impact.

IV No influence



Elements of Strategic Thinking and Planning

Strategy defined - a plan, method, or series of maneuvers for attaining a major aim.

All organizations across sectors (private, nonprofit, government) must set wise priorities in order to achieve optimal results with their limited resources. Results are at the heart of a healthy organization along with a positive reputation and the adaptive capacity to respond to an uncertain, changing operating environment. Wise strategic planning focuses on the 'WHAT' before the 'HOW.' 1. What should we do? 2. How we should do it.

At its best, strategic planning is an opportunity to learn together and unify. One of the best ways to deepen the shared inquiry is to develop a range of scenarios that encourage participants to suspend belief in any particular future. In order to shape alternative scenarios,

- Identify **driving macro-forces** in the operating environment. *What are the political, economic, environmental, social, and technological trends of importance?*
- Identify **predetermined elements**. *What are slow-changing phenomena, constrained situations that will continue, things already in the pipeline, and inevitable collisions between forces?*
- Consider **critical uncertainties** to sensitize participants to plausible, if unlikely futures. *Where do our hopes and fears reside about what could happen?*
- Sharpen **foresight** by exercising hindsight *Five years ago, what was foreseeable that we missed? What guidance does that give us as we look forward now?*

Scenarios confirm that the future is not predictable. For the organization to be successful, it must identify strategies that will be robust amidst uncertainties. There are three qualities that contribute to a strategy's robustness across scenarios:

- **Agility** *Does the strategy contribute to the improved ability to resourcefully respond, reconfigure, and shift focus or direction within short time frames?*
- **Unity** *Does the strategy encourage a greater degree of connection and collaboration within the organization and with external partners?*
- **Leverage** *Does the strategy enable focused effort (talent, creativity, coordination) to break through barriers, meet challenges, and capitalize on emerging opportunities?*

Remember, strategy is not only analytical. Deeply held values and core beliefs are an integral part of the strategy discussion because they will influence, or even control, what the organization will or won't do. Make sure there is enough time and space in the planning dialogue to continue to address core values.

Commit to the Right Strategic ('Stretch') Goals

With clear understanding of the operating environment and the relationship of external and internal realities, the core planning team can identify key issues that must be addressed. Turn an issue into a goal statement by framing an end state with an action verb. For example, if the issue is: *We are likely to face periodic funding uncertainties and lack any predictable income stream*, a large, 'stretch' goal might be **Diversify funding sources to provide more stability and reduce risk**. Common verbs that frame strong goals include: Build, Increase, Develop, Implement, Improve, Strengthen, Assure..... Successful organizations stretch themselves with high expectations. These types of goals may be enduring without a clear path forward to some point of resolution. Each goal will have specific, measurable objectives to point the way.

What is the issue? Why is this an issue?

(Relationship of mission, vision, strengths, problems, opportunities, & challenges)

What are the likely consequences if we don't address this?

Frame the issue as a clear, strong goal



Typically a good plan will select a few major (strategic) goals to leverage the organization's resources (leadership and staff time, budget) by focusing a well-coordinated, collective effort on high-consequence issues. There is often an inverse relationship between the number of goals and amount of progress an organization makes. Too many goals will certainly divide the effort and likely limit the quality of the results. After you have crafted a set of 'stretch' goals, you are ready to identify 'S.M.A.R.T.' objectives for each goal with detailed first year action steps for each active objective. Not all goals and objectives need to be active in the same time frame. Within this detailed planning work, you must be realistic about the priorities for the first year based upon your current capacity.

Develop 'S.M.A.R.T.' Objectives for Each 'Stretch' Goal

Stretch” goals lift your eyes to what you want so you remain focused on the right things for long term success. However, you need nearer-term objectives to focus the effort and build momentum. The right objectives will create a path toward your destination, the GOAL and beyond, to the VISION. Make sure these objectives are practical using the acronym, S.M.A.R.T. :

- **S**pecific, (What do I want to accomplish?, Who is involved? Where will it take place?)
- **M**easurable, (How much or many?, How will we know we have succeeded?)
- **A**chievable (Is it realistic given other responsibilities? Can we address barriers & constraints?),
- **R**elevant (Is there high value for the level of effort required? Is it practical in the current situation?)
- **T**ime-bound. (When will it happen? How does it fit in sequence with other objectives?)

What is the goal?	What is a key objective?	What is another key objective?	What is another key objective?
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After you have a set of SMART objectives for each goal, determine which ones you should work on in the first year. Then, commit to concrete action steps in the next 90-360 days to begin. This will start you on a course of ACTION, EVALUATION, REVISION.

Assess Impact and Establish Accountability for Results

A historic emphasis on output in planning (level of effort, budget, number of programs, etc.) has shifted to increase the focus on outcomes. There is increased insistence from funders and other stakeholders that organizations be accountable by demonstrating how they use the organization's resources to achieve measurable results that fulfill the organization mission. Multiple terms are used for accountability: metrics, benchmarks, performance measures, success indicators, outcome measures, key results, collective impact, etc. An organization should develop, track, and use a meaningful set of indicators that a. demonstrate accountability to others, and b. assess progress over time. Do not track too many things. Select only key indicators that are worth the effort to gather the data, discuss the results, and help to improve performance over time. Instead of a “lagging” indicator that reflects the ultimate success you want, consider a “leading” indicator that provides feedback about critical activity that demonstrates you are moving closer to the desired result. Use a grid like this to develop a tracking document in a MS Word table or Excel spreadsheet (often called a “scorecard” or “dashboard”) that becomes part of the planning review process.

Potential Indicator	Source(s) of Info	Benchmark	Review Loops
What is it and what will it indicate that is important? (Is it “lagging” or “leading?”)	Where will you get necessary data on the indicator?	What starting level will you use to measure progress?	How/how often will you review progress & make changes to improve results?
Goals			
#1			
#2			
#3			
#4			

Assure Execution With Practical Action Steps and Assignments

Within a 3 year plan, some objectives may be inactive at the beginning. The key objectives that will be active in year one require a structured action plan that lists major tasks (action steps). Each task needs responsible persons assigned to coordinate the work, a deadline for completion, and identification of needed resources. Most organizations use a 6-12 month action plan that is updated monthly or quarterly. Each update of the action plan summarizes the progress made and builds upon it. Use these categories and place them a MS Excel spreadsheet, MS Word table, or other format that is easy to update and track.

Goal #1 Objectives	1st year Action Steps for active objectives	Lead Responsibility	Resources Needed	Deadline
1.1				
1.2				
1.3				
1.4				

Goal #2				
2.1				
2.2				
2.3				
2.4				

Goal #3				
3.1				
3.2				
3.3				
3.4				

Goal #4				
4.1				
4.2				
4.3				
4.4				

Assure Success - Habits that Guide Execution

The most common cause of lack of success in the wise planning process is inadequate or flawed execution. The disciplined habits needed are lacking. A definitive book on the subject is *The 4 Disciplines of Execution* (McChesney et al. Free Press, 2012). What gets in the way is what the authors call the *whirlwind*, the full plate of operational commitments and daily urgencies that already demand the attention and engagement of leaders and managers. Without habits of regular review, assessment, and necessary course correction, the *whirlwind* will inevitably disrupt your good planning intentions and resist, or even prevent, successful execution. The urgent present will crowd out the important efforts to change over time. Vision and goals represent change and the status quo usually “resists” change.

After a strategic plan has been developed, the first 90-180 days is a critical time to build momentum. All of your investment of time, energy, and money in the planning is at risk unless there is prompt follow through to BEGIN to sincerely execute the plan framework (Goal/Objective/Action/Indicators).

The risk goes beyond the loss of time and energy invested in planning that does not produce value. The credibility and integrity of the leaders who convened the planning process could be questioned. Integrity requires that you keep the commitments you make. A plan becomes a set of promises about “what is important and what we will do.” Credibility means that what leaders say is believable. When you develop a strategic plan it becomes a set of statements about what you are committed to do. If there is little or no follow through to execute, this might affect the credibility of leaders in the future when a leader makes statements about what is important.

How

Habit #1 - Make Hard Choices About “Bandwidth”

- Less is more. No more than 5 goals. 3 is often better
- If you have 3 goals and each goal has 3 objectives, in year one, prioritize the objectives and only work on a short list

Habit #2 - Assign Each Objective 1-2 Champions to be Accountable

- Getting this right requires a person or persons with capacity, authority, and skills to team with others and ask for help when needed
- Do not make one person the champion of too many objectives.

Habit #3 - Commit Enough People, Money, and Time to Each Active Objective

- Momentum for the overall plan success will build if you start with tasks that are within reach. Avoid false starts with under-resourced objectives - If the resources are not yet available to assure execution, the first year action steps tasks focus on development of necessary resources.

Habit #4 - Track the Right “Leading” Indicators

- Ultimate results are lagging indicators of success. A leading indicator is usually some high value activity on the critical path to the lagging indicator. The total amount of money raised might be the lagging indicator of success for a nonprofit. A good leading indicator that you are making progress might be the number of new grants filed in the past 90 days. Another might be the number of face-to-face meetings held with current and potential major donors in the past 30 days.

Habit #5 - Use Regular Feedback Loops to Review and Course Correct When Necessary

- Weekly or monthly 30 minute discussion by execution teams
- Quarterly face-to-face, 2 hour review of indicators by leadership & champions
- Formal annual review of entire plan with explicit re-commitment to framework as-is or modification/course correction

Use a Wise Planning “Blueprint” to Build Success

A one-page summary of the elements of the plan (“blueprint”) is a useful way to keep the plan in front of leaders and staff for review and reference. You may also have a narrative plan document that explains the environment scan, planning process, and the strategic reasoning that led to the goals and objectives. There may also be tracking documents to assure progress with action plan assignments and assessment of success indicators. A “blueprint” like the one below provides the basics “at-a-glance” and can be an effective way to educate donors and funders, recruit new board members and leaders, and orient staff/employees to the organization's work. It is easy to create and update your own version as a table, slide, or spreadsheet.

Mission Statement	Guiding Values and Principles	Enduring Vision Horizon Vision		
Goal 1	Goal 2	Goal 3		
Key S.M.A.R.T. Objectives for Each Goal				
1.1 1.2 1.3 1.4 1.5	2.1 2.2 2.3 2.4 2.5	3.1 3.2 3.3 3.4 3.5		
Current results for key success indicators (updated _____)				
Goal 1	a.	b.	c.	d.
Goal 2	a.	b.	c.	d.
Goal 3	a.	b.	c.	d.

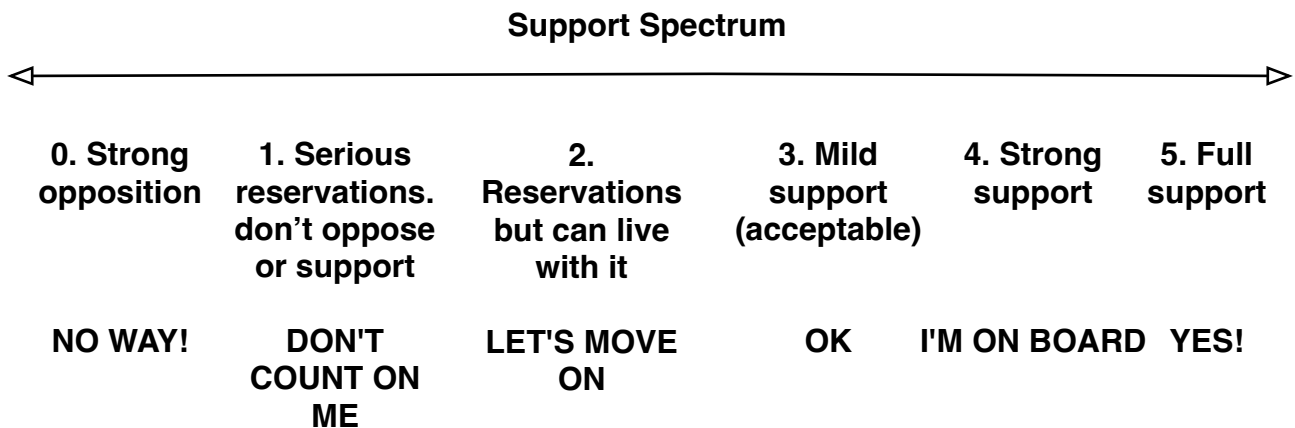
Develop Consensus Support for the Strategic Plan

Consensus means that there is general agreement, support, and buy-in for a plan, decision, or course of action. There may be degrees of enthusiasm, but there is at least, acceptance, and, possibly, whole-hearted willingness to move forward together.

Organizations, coalitions, and alliances can work with the concept of consensus by considering its root meaning in the Latin word *consentire* which means *to think and feel together*. Rightly understood, consensus is as much a process of engagement to consider and weigh all views, as it is a decision-making outcome.

Even when a governing board, leadership team, strategic planning team, or committee has formal rules that require a majority vote to pass a measure, it can be important to use the language of consensus to develop an understanding of the necessary degree of support for an initiative to move forward. A 4-3 vote may be legally sufficient, but the failure to carefully listen to minority concerns and consider their merits can also generate opposition, lukewarm support, and flawed implementation.

Leaders should always assess the path to long-term success for each key decision. What kind of consensus support will be necessary for full execution? Use the support spectrum below to refine the discussion of YES/NO. Pragmatically consider and integrate differing perspectives to shape an outcome with sufficient support.

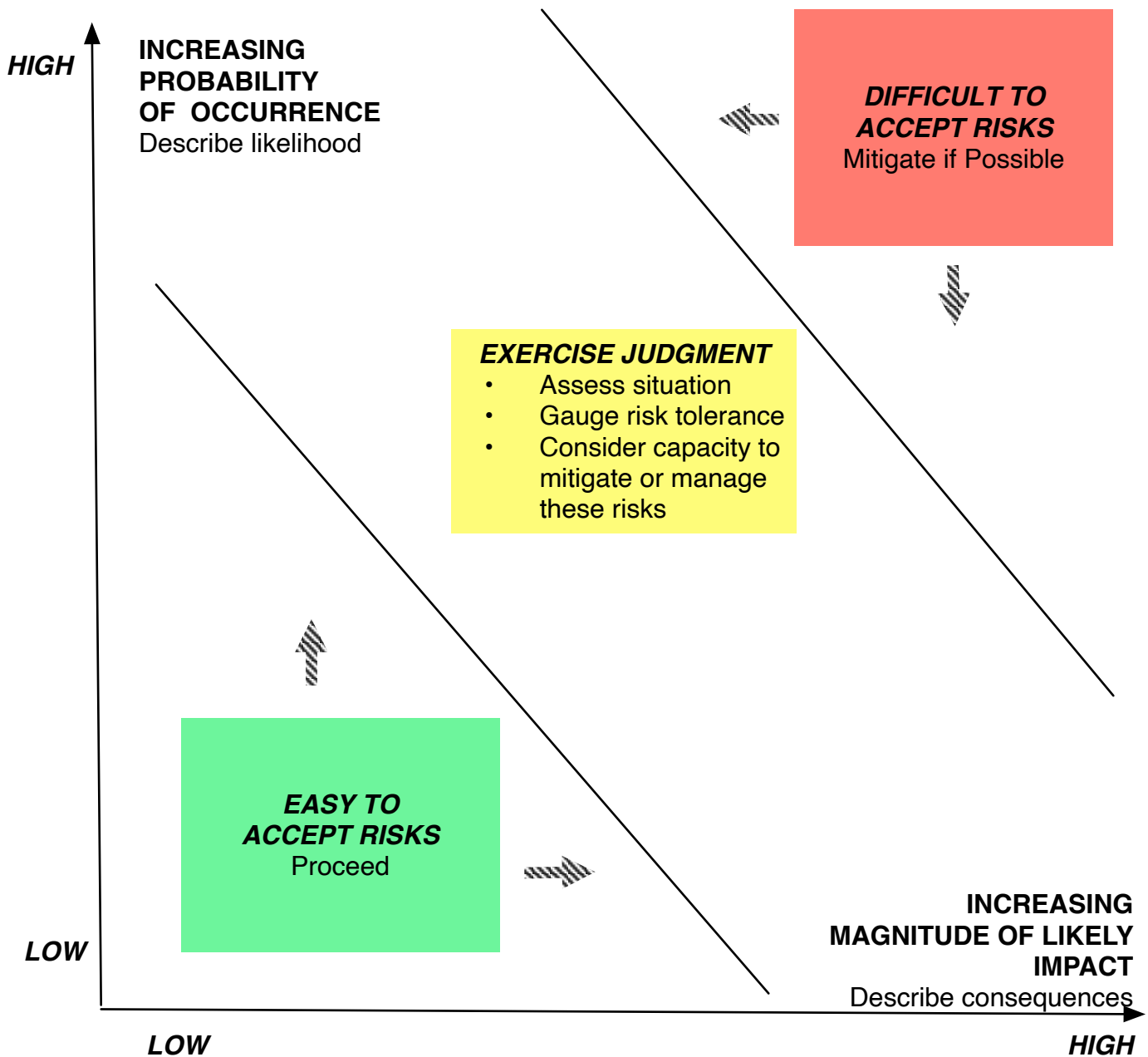


There are two common criticisms of consensus and the effort necessary to build it. 1. Apparent consensus covers over sincere differences. *Groupthink* is a term for this false consensus. Pressures to conform, belong, and “play ball” eliminate the examination of divergent opinions and differences in order to convey a false sense of unanimity. 2. A “consensus” is only possible through watered-down compromise that offends no one but generates mediocre results.

Genuine dialogue is the answer to each of these challenges.

Assess and Discuss Risks

At the heart of key decisions and wise strategic planning is the need to understand the significance of the risks to stakeholders. Ask two questions to respect stakeholders, honor key values and make intelligent strategic choices. 1. What is the probability that it will happen? 2. If it occurs, how large is the likely impact? This diagram can be drawn on a whiteboard or flip chart to focus on possible risks. After assessing risks, consider your tolerance for intelligent risk and the ability to proactively manage or mitigate the risk.



Use an Information Map to Assess Significance

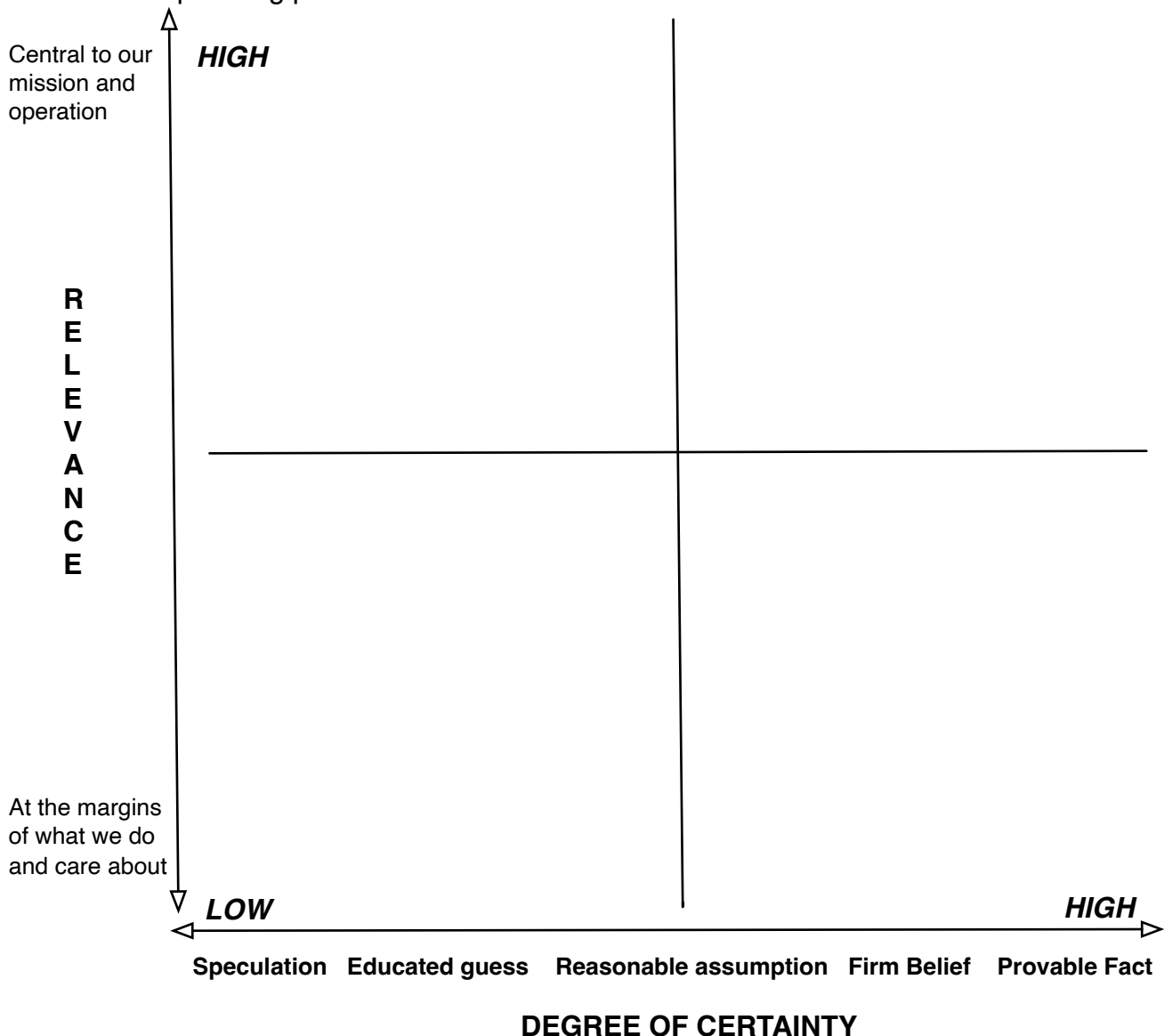
Wise strategic planning requires solid understanding of the situation including available options, costs, risks, stakeholders, trends, operating environment, and history. Not all information is equally significant. Some is more relevant. Some is more certain. Improve the clarity of the dialogue and the ultimate quality of your strategic decision making with candid discussion of information quality.

Assertions about what you know, what you think that you know, and what you believe all come down to one core question:

What does this really mean to me..to you..to us?

The MEANING of Information = Relevance X Certainty

List major items of essential information, number each item, and place the number on this grid. Share your assessment with others. Continue to acknowledge degrees of meaning in the decision or planning process.



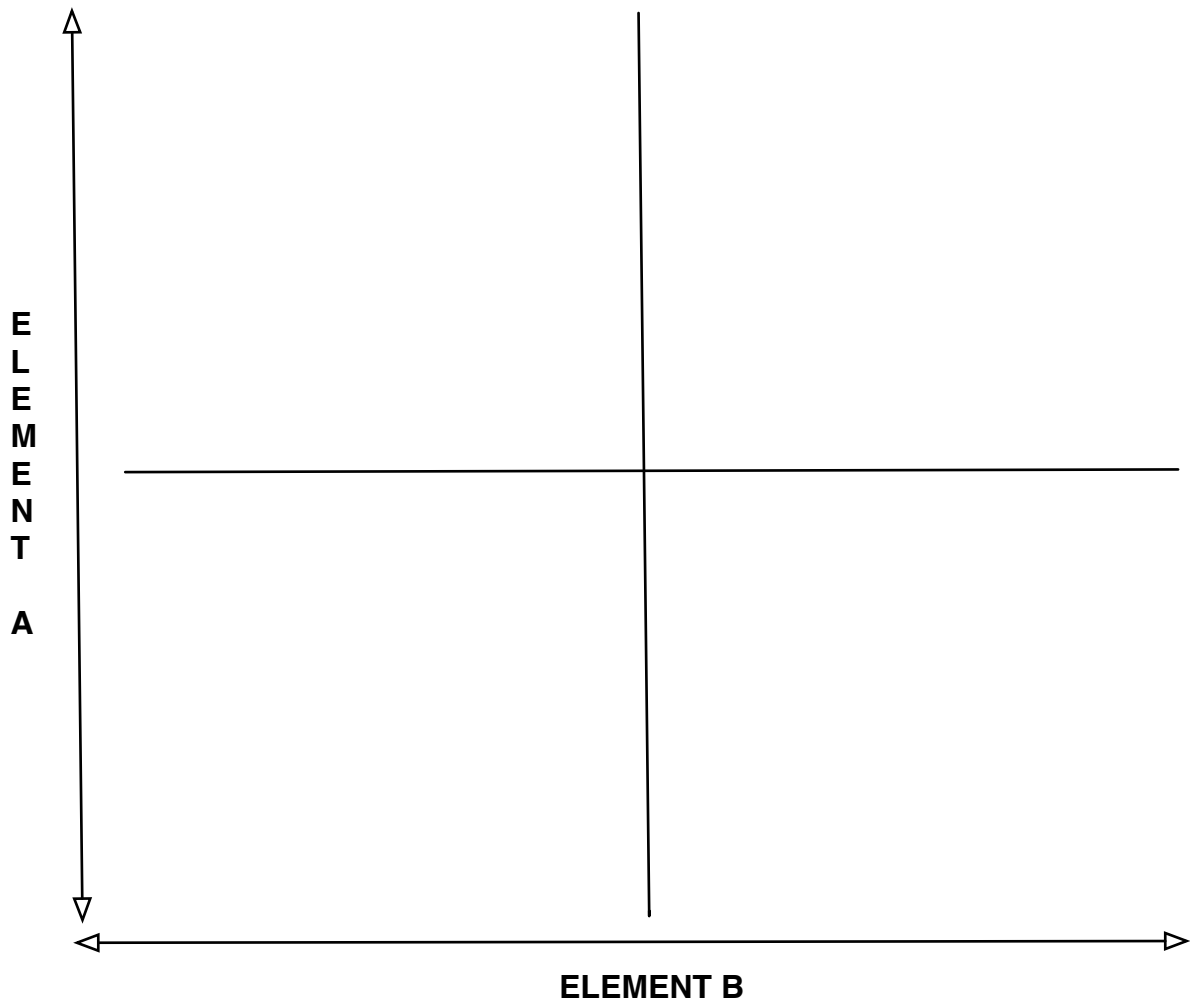
Build Scenarios to Identify Robust Strategies

Scenarios are thinking tools to enhance perspective on the emerging future. They are not predications or strategies. They are stories that articulate possible futures. Scenarios take time to build and can be valuable to assess current strategies, develop new approaches, and confirm the strategies that are likely to be most effective amidst a range of plausible tomorrows. Scenario thinking positions organization decision-makers to anticipate, recognize signs, remain flexible, and be proactive.

A common approach is to identify and consider:

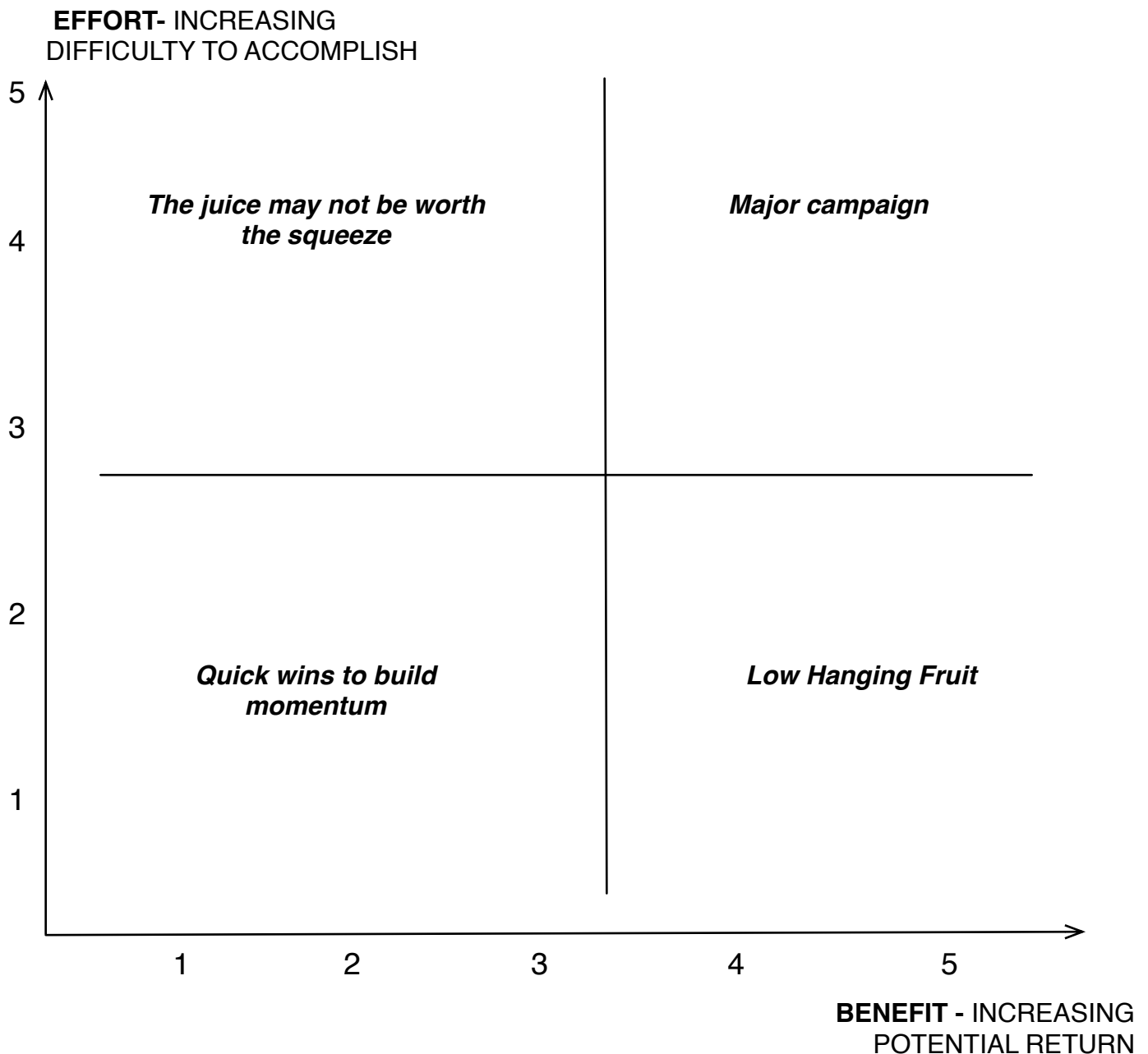
- Important forces in the local environment that shape the success of the organization
- Driving macro forces that influence local factors and shape the outcome of events, ranked by importance and degree of uncertainty that surrounds them
- Predetermined elements such as conditions that will continue, slow-changing phenomena, things in the pipeline, and
- Critical uncertainties that represent significant hopes and fears.

Then, two key elements are chosen with divergent possibilities of each element placed on the horizontal and vertical axes. This creates four quadrants of possibility that can be developed into four different stories about what could be.



Examine Choices with a Payoff Matrix

When it is time to consider possible goals and objectives, remember that a good strategic plan makes careful choices. It is usually a mistake to have too many priorities. If you do, you may fail to concentrate the focus and leverage the organization's limited resources for maximum effect. A payoff matrix can be drawn on a white board or flip chart to place ideas for action along side each other to visually compare the effort/benefit tradeoffs.



Develop Strategic Goal Ideas - Small Group Activity

This small group dialogue exercise offers an approach to engage everyone's perspective when there are issues or concerns in the organization's operating environment that suggest the need for wise planning.

Name of First Contributor (Step One)

Step 1: Person A writes down one or more ideas for stating a clear, important goal that could guide the effort to fulfill the mission and address the current situation.

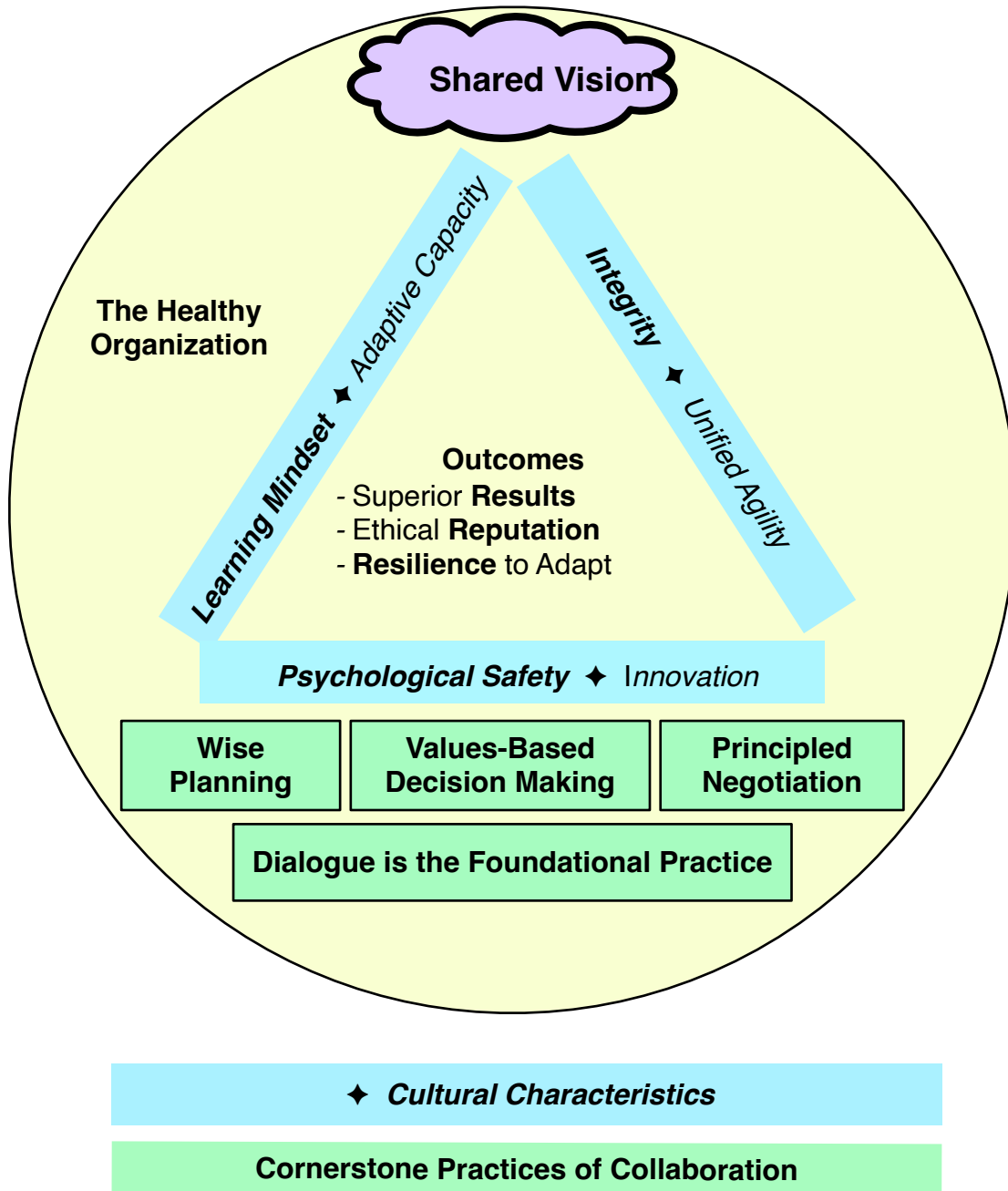
Step 2: Person B takes Person A's initial written ideas and silently adds comments, e.g. what you like or don't like, questions to consider, variations/additions/improvements to the idea(s).

Step 3: Person C takes the written output from Steps 1 and 2 and adds his or her comments.

Step 4: The worksheet returns to Person A who considers that feedback and comments from Steps 2 and 3 and considers how to revise/edit the initial ideas to make the proposed strategic goal clearer.

Step 5: The proposed strategic goals come back to the larger planning group for dialogue and assessment.

Wise Planning & the Architecture of Creative Colloration



What is Wisdom?

As a part of a planning team, you want to make decisions and commitments that lead to a healthier, more successful organization, department, or school. Wisdom, in the practical sense, comes down to the ability to a. make the right choice when you make a decision and b. offer wise recommendations to others when they seek your advice.

Two interconnected processes are at the heart of the essential life practice of decision making, as a decision maker or an advisor to others. First, you need to clearly perceive and comprehend the reality of the situation. Second, you must be able to deliberate and discern what has meaning and significance in order to choose wisely.

Clarity of perception and true understanding go beyond intellectual capacity and the level of one's formal education. Intuition, common sense, life experience, and emotional intelligence all contribute to being wise.

Effective leaders and groups encourage different perspectives and deliberate reflection to cultivate wise choices. When you place yourself in the humble position of a life-long learner, no matter how educated or experienced, you gain more capacity to think clearly and understand what matters. This capacity moves toward wisdom. Failure to do so moves away from wisdom.

Wisdom also grows when you can frame the situation accurately to include all that is relevant to consider. In wise strategic planning, it is essential to keep the stakeholders who will be affected by the organization's choices in the center of your field of vision.

As you deliberate about meaning and significance, you need both cognitive and emotional lenses. Like a set of binoculars that can be focused together with intention, this combination allows you to develop empathy for those touched by the plan decisions and remember what is important to them. With empathy for people who may be affected, you activate a critical capacity, the moral imagination. This uniquely human ability enables you to imagine how various options could unfold and weigh the possible positive and negative impacts. These capabilities develop wisdom.

The work of Schwartz and Sharpe (*Practical Wisdom*) and other neuroscientists clearly connects the ancient philosopher, Aristotle, to leading edge research on the functioning of the brain. The integration of timeless moral philosophy with current scientific knowledge about the way we actually choose underscores that it is important for members of a planning team to be self-aware in order to contribute their best thinking about the organization's future success during the planning process:

1. CLARITY OF PURPOSE Do you want to do the right thing (WHAT), for the right reasons (WHY) and in the right way (HOW)?

2. FOCUSED PRESENCE Can you listen, speak and contribute with a positive attitude?

Humility Be willing to enter into honest dialogue with others, listen carefully, and seek others' perspective to learn before making up your mind and offering your recommendation or opinion. Avoid arrogance and fill in gaps in your understanding.

Emotional Equilibrium Remain patient, and connected to your emotions while being flooded with feeling and overreacting. Emotions are a source of information about what we value and need. They are essential to understand and *may* point toward something important, but they are not, by themselves, wisdom.

Heart-Intelligence Stay connected to what you and others VALUE and NEED.

3. DELIBERATE PRACTICE Are you willing and able to align with your intended purpose and act mindfully to determine the best course of action?

Seek perspective Develop a clear view of the strategic situation, the possibilities, and the choices to identify what is important to you and other stakeholders.

Engage in dialogue Ask open questions and listen generously to learn together about the possibilities to move forward constructively.

Check your intuition Listen to the still, small voice of your good sense that can point toward fairness, positive priorities, and a balance between extremes.

Tap the moral imagination Draw on your experience and the ethical example of others to consider what is right to do in the present situation.

Use precautionary foresight Weigh risks, uncertainties, and possible consequences including possible harm from apparently good choices.

Wisdom-in-action requires:

ethical will - firmness of right purpose, and

skill - ability to read the situation, be self-aware, engage others, reflect, and choose