

## **SOUTHERN DISTRICT AAHPERD STRATEGIC PLAN**

### **Revised December 31, 2002**

The Southern District Strategic Plan is based on the 2001 AAHPERD Plan. Its purpose is to support and serve as an extension of the goals established by AAHPERD with modifications that reflect the insight of Southern District's membership.

The AAHPERD and Southern District vision statement provides a basis for the development of a strategic plan that directs the organization into the future. The vision stretches the Board of Directors and the organization's membership to look beyond the operational horizon and integrate diverse variables such as time, technology, personnel, and programming into its thinking.

**AAHPERD Vision Statement**: AAHPERD envisions a society in which all individuals enjoy an optimal quality of life through appreciation of and participation in an active and creative health-promoting lifestyle. Members of AAHPERD and its national, district, and state associations are recognized as dynamic role models in the realization of this desired future. Members and staff are fully committed to accepting responsibility for continued determination of this future (AAHPERD Bylaws).

The Mission of AAHPERD and the Southern District is a compass to guide the organization by describing the purpose for which organizations exist. Thus the mission is the cornerstone upon which the entire strategic plan is developed.

AAHPERD's mission is to promote and support creative and healthy lifestyles of all citizens through high quality programs in health, physical education, recreation, dance, and sport; and to provide members with professional development opportunities that increase knowledge, improve skills, and encourage sound professional practices. (Alliance Assembly, April 1998)

The Southern District Strategic Plan focuses on the effective implementation of established goals. Prior to developing the goals and recommended indicators of success, the Strategic Planning Committee looked at the areas in which Southern District has achieved success and the components that need support, guidance, and possibly additional help to achieve success. The Plan identifies the strengths, weaknesses, opportunities, and threats (SWOT) to the organization, as did AAHPERD's Strategic Plan. The emphasis of this Plan is to make the Southern District of AAHPERD a stronger and more viable organization to successfully achieve the joint vision and mission.

## **THE SWOT ANALYSIS**

### **STRENGTHS**

Openness towards diversity

Expertise of individual members

Dedicated, knowledgeable, hardworking people in leadership positions

Many committed professionals

Adequately financially sound

Focus on student recruits and programs

### **OPPORTUNITIES**

Increase awareness of who we are

More productive and efficient use of technology

Seek funds from all sources

More support for programs from nationally-recognized sports figures and professional programs

Create more training in leadership development for young professionals (not students)

### **WEAKNESSES**

Lack of diversity in membership and leadership

Lack of data information on members so that member capabilities are used to the fullest

Few external sponsored programs, workshops and conferences

No accountability of services to members

Lack of adequate communication system to all members

Lack of consistent, delegated responsibility, and direction to members in elected substructures

Limited resources to help fund programs and projects

Lack of follow-up on students as they become professional members

### **THREATS**

Lack of agreement among the general membership and the states' leadership as to who we are and what we do

There is little use of technology in membership communication; this reduces involvement in the organization

Members choosing other organizations as their first choice of professional affiliation

Limited external funding sources are used

De-emphasis on Health and Physical Education across the country

There are fewer young professionals seeking leadership opportunities and positions

Increases in dues without obvious improvements or services to members

## **STRATEGIC GOAL # 1: To increase advocacy efforts**

**Relationship to vision and mission**--Advocacy formalizes the process for achieving visibility for Southern District, the AAHPERD, and the membership with groups who share, or ought to share, the vision and mission related to promoting an active, creative, and healthy lifestyle.

**Effect on member services**--Advocacy initiatives provide processes and procedures for members and collaborating partners to increase awareness and educational opportunities about our professions for the membership, general public, policy makers, educational leaders, parents, and other key individuals.

### **Critical indicators of success and recommendations for implementation**

**a) Consult with the AAHPERD National Associations and other Districts on their advocacy plans to determine how the plans address the Southern District needs and how the Southern District efforts support national initiatives:**

The communication between the Southern District division vice-presidents and the president of each national association and other Districts will help build relationships to further the vision and mission of both AAHPERD and Southern District.

**Begin in the spring of 2003 and continue on an annual basis.**

**b) Develop an advocacy plan:**

The president will appoint an ad hoc committee to work with the Board of Directors and other division officers to write a realistic Southern District Advocacy Plan. The Plan may address specific concepts (i.e., providing services to the grassroots levels for talking and communicating with key leaders) or issues (i.e., decreasing obesity levels, program assessments). The Plan will be submitted to the Board of Directors in 2003. The Board may choose to publicize the Plan in *Southern Links* and make it available on the website. **A draft Plan will be ready in the summer 2003.**

**c) Select targeted messages, information, and materials to be used to implement the advocacy plan:**

After the initial report of summer 2003, The Executive Committee with the approval of the Board of Directors, will review, identify and select the targeted messages, information, materials, and processes to be used in the advocacy effort. Information and talking points may be communicated through a variety of media and to the general public or selected populations (i.e., PSAs with “squeaky clean” athletes or other spokespersons; press releases; conference programs for administrators, parents, legislators, and policy makers; or mini-grants to states or communities, to name a few).

**Begin developing messages and materials in the fall of 2003 and assess the information annually.**

**d) Create partnerships for advocacy efforts:**

It is important that the Southern District leadership develop a Plan to align the Association with groups that have similar visions and missions. The Board of Directors in consultation with division leaders will identify key coalitions and advocacy partners to

work with in the upcoming years (i.e., state associations, state education and health agencies, school health advisory groups, parents, American Cancer Society, American Heart Association, Blue Cross/Blue Shield, and Presidents Council on Physical Fitness and Sports to name a few) and will determine the most effective way to accomplish the desired results.

**Begin creating partnerships in the summer of 2003 and make it an ongoing initiative.**

**e) Evaluate results of the Advocacy Plan and revise it annually to meet new needs and goals:**

The Strategic Planning Committee will review the Advocacy Plan annually to identify accomplishments and to make recommendations to the Board of Directors regarding challenges and opportunities of the future.

**Begin the evaluation in the spring of 2004 and assess the Plan annually**

**STRATEGIC GOAL # 2: To support and encourage all health, physical education, recreation, and dance professionals to become active members of AAHPERD and their state associations**

**Relationship to vision and mission**--The services and opportunities available through memberships at the state, district, and national levels will enhance the professional growth and development of each individual and will increase leverage of each organization.

**Effect on member services**--The support system and connection among the state, district, and national levels will provide each member with programs and services needed to maintain and strengthen professional competency.

**Critical indicators for success and recommendations for implementation**

**a) Make membership forms more accessible to potential members :**

Southern District will make information about AAHPERD and State membership forms available in the *Southern Links* and on the website and will work with state associations to ensure grassroots distribution.

**Begin in the winter of 2003 and continue annual promotions.**

**b) Support incentives for membership to AAHPERD:**

The Southern District Board of Directors and the membership at large will support AAHPERD's efforts to recruit members. The *Southern Links* and the website will provide supporting information about incentives for recruitment (i.e., information about liability insurance through AAHPERD, CEUs at conferences, and mentor programs for student and new professional members).

**Begin in the fall of 2003 and continue annual promotions.**

**c) Create opportunities for involvement of students and young professionals in the Association:**

Work with AAHPERD to assess what is needed to attract students and young professionals to the Association. Develop mentor programs to guide potential and young professionals' involvement in professional service.

**Begin in the fall of 2003 and keep the initiatives ongoing.**

### **STRATEGIC GOAL # 3: To increase diversified external funds and improve profitability of the financial portfolio in accordance with the Southern District Investment Policy**

**Relationship to vision and mission**—Efforts related to this goal increase the potential for revenue to enhance all aspects of Southern District's efforts to achieve the vision and mission (e.g., funding for new programs, supporting current initiatives, and holding fees to a minimum).

**Effect on membership**—The quality and quantity of services will increase with additional revenues (e.g., increase in workshops, more diversity in publications, and more effective/efficient use of technology).

#### **Critical indicators of success and recommendations for implementation**

**a) Develop a plan for securing external sources of funding :**

The president will appoint an individual (or committee) to seek a list of potential funding sources that share Southern District's vision and mission. The list may be obtained from publications, websites, division meetings, committee chairpersons, and other members. The Executive Committee will provide the list to the Board of Directors for discussion and deliberation regarding realistic sources to approach.

**The Finance Committee will conduct an annual review of the financial portfolio and potential funding sources.**

**b) Allow the Advisory Subcommittee of the Finance Committee greater authority for identifying new sources of income in consultation with the Southern District's professional financial advisor.**

Rewrite the Operating Code of the Finance Committee to provide more direction for strengthening the financial viability of Southern District. The Board may need to expand the Committee to include knowledgeable, competent individuals with specific skills to assist the committee.

**Although the process will be ongoing, preliminary information will be provided to the Board in the fall of 2003.**

**c) Create ways for the membership to get involved in the search for external funds .**

Possible strategies to encourage member involvement may be in scheduling grant writing workshops for new and experienced writers, requesting support for increasing exhibitors at conventions and conferences, and developing partnerships for joint ventures with state and national associations.

**Begin in the fall of 2003.**

## **STRATEGIC GOAL # 4: To increase and diversify membership and services**

**Relationship to vision and mission**—This goal provides a forum for professional development aimed at increasing knowledge, improving skills, and encouraging sound professional practices; provides opportunities for increasing the numbers of dynamic role models; and ensures that member services coincide with the core fundamental goals of Southern District.

**Effect on member services**—The goal recognizes the diversity of needs and interests in member services; provides opportunities to learn from experienced professionals and to network with a diverse membership; and offers opportunities for continual nurturing, learning, and professional growth.

### **Critical indicators of success and recommendations for implementation**

#### **a) Recruit new members for AAHPERD:**

The Southern District Board of Directors, under the leadership of the president, will work with AAHPERD and the state associations to promote AAHPERD membership.

**Begin in the spring of 2003 and make it a focus each year.**

#### **b) Disseminate information about available AAHPERD services:**

National and Southern District programs and services should be promoted to members as well as professionals who have not made a personal commitment to AAHPERD.

Specifically, conventions and workshops held in the Southern District states should be widely publicized in the *Southern Links*, on the website, on any District listserv, in state journals, and on each state AHPERD listserv. Technology is crucial in such efforts.

Provide a section of *Southern Links* to upcoming conferences, workshops, programs, and other events. For more effective communication, collaboration with the six AAHPERD national associations should be encouraged. The District vice-presidents should schedule meetings with the national staff members and officers at the national convention.

**Begin in the winter of 2004 and continue annually.**

#### **c) Provide conference material to non-conference attendees:**

Explore the feasibility of sending conference materials to members who cannot attend conventions and want information from the sessions. A prepaid fee for printing, packaging, and mailing will be established. The task could be assigned to a convention committee and completed at each convention. All materials could be submitted early for inclusion in a conference manual. These materials could be divided into the various divisions. The information may be put on a disk or e-mailed to reduce postal costs. If external funding is available the service may be contracted out.

**Begin in the spring of 2005 and offer annually.**

#### **d) Identify expert speakers among the membership to promote the Association's vision, mission, and efforts of the substructures:**

Division Vice-presidents along with their councils will create a list of persons with expertise in specific subject areas and topics. Information about the professionals will be provided on the website and through other means of communication. The list will include persons (i.e., National Board Certified teachers, teachers of the year) who can speak at in-service programs, retreats, civic groups, leadership conferences, or summits. This resource can be used at the local, district, and national levels. The information will include statements of expertise and where the professionals are available for presentations. The division vice-president will serve as the content contact person.  
**Begin in the spring of 2004 and continue annually.**

**e) Assist states in developing strategic plans that support the AAHPERD and Southern District Plans :**

There must be an effort to help each state association establish a strategic plan so the membership can better understand the organization. A portion of the Southern District Leadership Conference should be designated to help states develop their strategic plans including its vision, mission, and potential action steps. The state teams should recognize how their plans parallel AAHPERD's and Southern District's plans. The states with strong strategic plans can provide leadership to other state associations. The time required for this type of technical assistance will be reduced as state associations annually review and update their plans.

**Begin in the summer of 2002 and offer the services annually.**

**f) Identify specific topics that should be addressed annually at the Southern District Conference :**

Each year the Southern District program should include topics of major concern to professionals in HPERD. Participants value information on critical topics and will look for "hot topics" on future programs. For example: a workshop by AAHPERD staff on lobbying can help local school and state systems when health, physical, or dance education programs are in jeopardy. An annual assessment and identification of "hot topics" by the Executive Committee and the Program Planning Committee are crucial.

**Begin in the spring of 2003 and assess annually.**

**g) Offer CEU'S for subject areas as needed by the membership:**

The Southern District program planning committee will work with the divisions' leadership and the national associations to set up the CEU process for the membership.

**Begin in the spring of 2003 and offer annually.**

**h) Offer job opportunities and placement services:**

Use the website to advertise job opportunities. Update the information in a timely fashion and facilitate communication between potential employers and employees.

**Start at the 2004 Convention and continue annually.**

**i) Recognize publications and writings by members :**

Provide an opportunity for members who are authors to talk one-on-one or offer a mini-presentation about their book or article during a potential "Publications Fair" at the Southern District Convention. (The activity is different than a research poster session.)

This event may encourage others to write. Consider offering space in the *Southern Links* for sharing this information.

**Begin in the spring of 2003 and assess annually.**

**j) Identify strategies that might attract new or renewed memberships.**

(1) Appoint a committee to investigate untapped sources for membership such as daycare workers providing health/wellness instruction, community-based dance instructors, fitness trainers that also teach in public or private schools, or leisure and recreation leaders at senior homes or assisted living compounds. (2) Market memberships to jump rope and hoops for heart coordinators. (3) Provide reduced rates for retirees. (4) Offer more certificates, citations, or awards for jobs well done. (5) Investigate dual or collegial memberships in other associations and organizations. (6) Provide complimentary journals or newsletters to potential members. (7) Increase publication opportunities. (8) Increase performance opportunities for dancers. (9) Work with AAHPERD to investigate student and first-year membership incentives.

**Begin in the fall of 2003.**

**STRATEGIC GOAL # 5: To create a more efficient/responsive organizational structure and governance system**

**Relationship to vision and mission**--The following information is taken from Article V Governance, of the Southern District Constitution and Bylaws: "The business of the Southern District shall be conducted by a Board of Directors, a Representative Assembly, Officers, Executive Committee, and Committees as herein provided, with voting privileges as hereinafter provided." Hence a major purpose of the structure and governance of the Southern District of AAHPERD is to enable the organization to become a dynamic force in providing leadership to create a society supportive of an active, creative, and health promoting lifestyle. A key function of the Board of Directors is to oversee accountability throughout the organization.

**Effect on member services**--The Board of Directors will be more responsive to member concerns and societal needs and will have an enhanced ability to act efficiently and appropriately in a business environment.

**Critical indicators of success and recommendations for implementation**

**a) Correlate the Southern District Operating Codes with the Strategic Plan:**

The Constitution and Bylaws Committee will review the Constitution and Operating Codes for all components of the organizational structure and governance system and the Strategic Plan to ensure they all are aligned. The parliamentarian directs this process with the support of other persons responsible for the various Southern District components.

**Begin in the spring of 2003 and assess annually.**

**b) Distribute information in a timely fashion to relevant substructures and to the membership at large:**

Each Board member and committee chair/member will work with the webmaster and *Southern Links* editor to share relevant information as needed about specific issues, concerns, and opportunities for their area of responsibility.

**Begin in the spring of 2003 and keep it ongoing.**

**c) Provide the background and rationale for resolutions and motions at all Southern District meetings, including the Division and committee levels**

All issues, changes, and recommendations proposed should be discussed thoroughly before motions are made or before votes are taken in Board meetings or the Representative Assembly. This will ensure that the vision and mission of Southern District is considered in all official actions. All committee and division reports to the Board should reference how each action is directly related to the Strategic Plan. The report form will be revised to include this information into the operating procedures.

**Begin in the spring of 2003 and continue annually.**

**STRATEGIC GOAL # 6: To plan programs and allocate resources to sustain public affairs, marketing, and fund development functions within Southern District**

**Relationship to vision and mission**—This goal promotes and communicates the benefits of healthy and creative lifestyles and provides resources to promote professional development opportunities.

**Effect on member services**—The Budget Subcommittee of the Finance Committee and Board of Directors can allocate financial resources annually to promote and disseminate information about programs in health, physical education, recreation, dance and sport. This initiative can increase diversification of revenue sources that directly affect member services and programs of the Southern District.

**Critical indicators of success and recommendations for implementation**

**a) Identify the Executive Committee and the Board of Directors as the primary coordinators of all external fund raising activities for program and service needs :**

An ad hoc committee, to be named by the president, will develop a plan for securing external funding for financing projects, services, and programs for the members. This committee will discuss the proposed plan and implementation processes with the Executive Committee and the Board of Directors. This Plan should be reviewed and updated annually by the Board of Directors.

**Initial work will be completed by the spring 2003; it is an ongoing process.**

**b) Provide leadership conference sessions :**

For a period of three years the Southern District Leadership Conference will designate time (a session) to explore the need for external funding and the extent that each state and Southern District can partner in joint funding initiatives.

**Begin in the spring of 2003 and three future years.**

**c) Identify a Southern District spokesperson:**

Identify a person or persons who support the vision and mission of the profession and are allied with Southern District. Determine if this individual or the company that the person is affiliated with is willing to donate time, effort, and money to help secure additional funding. The spokesperson may serve a two to three year "term" (as determined by the Board of Directors). The Board of Directors may also choose to identify a mascot for publicity purposes.

**Begin in the fall of 2003 and continue annually.**

**d) Develop a public relations plan targeting parents and school administrators :**

The president will appoint a committee to work with the AAHPERD national associations and others such as the National PTA, National Education Association, Association for Supervision and Curriculum Development, or Society of State Directors for Health, Physical Education, and Recreation to review existing resources and design awareness messages about creative, healthy living and about ways to reduce health-risk behaviors among youth. Prepare sample presentations that can be used at state and local meetings for parents and school administrators.

**Begin in the fall of 2003 and provide an update at each Board meeting.**

**STRATEGIC GOAL # 7: To increase efficiency and effectiveness in using electronically based technology to enhance members' services.**

**Relationship to vision and mission**—This offers increased access to information regarding professional development activities (i.e., increased knowledge, improved skills and sound professional practices) and background information promoting the benefits of healthy lifestyles.

**Effect on member services**—Current technology provides efficient access to information, products, and conventions; timely responses to membership inquiries; and rapid dissemination of information.

**Critical indicators of success and recommendations for implementation**

**a) Hire a paid web master:**

A small honorarium to a skilled person will increase the likelihood of securing a web master that is responsive to the Board of Directors and to the membership for information provided. This information should be included in the 2003-2004 budget.

**Begin in the fall of 2003 and evaluate the position annually for quality of service.**

**b) Extend web-based services and benefits for members :**

The following web-based services should be considered:

- Board minutes available to the membership;
- Announcements of events relevant to Southern District members;
- Full convention registration and housing online; selected convention program sessions may be summarized and put online for convention non-attendees;
- More efficient means of e-mail communications;

- Announce applications for convention programs, awards, officer nominations;
- Provide a completed program for all members;
- Create an online journal website;
- Design a question/answer section on the website (or, perhaps, a chat room); and
- Link to lesson plans website.

Southern District can develop an “e-community” via strategic use of broadcast e-mails, the listserv, and other online services as recommended by the membership and approved by the Board. In addition to more autonomy of the website, Southern District needs more structure to the website.

**Begin in the winter of 2003 and continue as an ongoing initiative.**

**c) Build knowledge through advances in information processing, analysis, and communications :**

Provide sessions at every opportunity to assist members in becoming more efficient in the latest technology. At every opportunity, encourage members to use the e-system to communicate with professional colleagues. Such use builds proficiency.

**Begin in the spring of 2003 and continue annually.**