



# SHLB Coalition

## 2023-2025 Strategic Plan

Final - Adopted by the SHLB Board on July 12, 2023

### I. Introduction and Summary

Since the creation of its 2018 strategic plan, SHLB has become the leading national public interest advocacy group supporting affordable, high-quality broadband for anchor institutions, and one of the leading organizations promoting digital equity for all. Over the past several years, SHLB has achieved several significant policy victories, has gained recognition across the country for its research and advocacy, and significantly expanded its membership to over 325 members. The organization is now financially self-sufficient and is looking to build on this success by expanding its influence and increasing its revenues.

In a poll conducted during the strategic plan process, SHLB received strong praise for its advocacy, its access to federal policymakers, its coalition-building, its efforts to reach consensus among diverse constituencies, its engagement with members, and its transparency and expertise. The primary feedback from stakeholders is that they encourage SHLB to do even more of what it is currently doing. As a result, SHLB intends to strengthen its policy advocacy, deepen its research, enhance its long-term organizational sustainability, continue to increase membership and membership engagement, and increase its visibility.

In short, SHLB has grown out of its “teenage years” and is now a “young adult.” It has survived the loss of its funding parent (Gates Foundation) and is now maturing into a self-supporting organization that is strong, effective, and ambitious.

To help chart the course for the next three years, SHLB surveyed its members, interviewed outside parties, and gathered a task force of both member and non-member stakeholders to produce this plan. Our success will depend on securing access to additional financial support, which is a part of this Plan, to enable additional policy work and organizational expansion.

### II. Vision, Mission and Values

SHLB is widely recognized as a strong and effective public interest organization dedicated to helping anchor institutions solve the digital divide for all. We are a non-partisan, fact-based advocacy organization that promotes broadband investment by both commercial companies and non-profit organizations, such as research and education networks, telehealth networks, and municipalities.

SHLB combines a strong mission, elements of a “think tank,” and a diverse membership base that provides real-world experience to inform our research and policy recommendations. While SHLB cherishes its

members, SHLB is driven first and foremost by its mission. This makes SHLB different from a trade association (which typically focuses on representing its members). While SHLB seeks to find consensus among its members, it occasionally takes controversial positions if necessary to advance our cause.

Based on the recommendations of the strategic plan task force (*see appendix*), this strategic plan updates and expands SHLB's vision and mission as set forth below. updated vision and mission recognize that SHLB's goal is not just to connect anchor institutions with high-performance broadband, but also to facilitate affordable, high-quality broadband access for all.

**SHLB's Vision<sup>1</sup>:** "For every community anchor institution and individual to have affordable, robust, and secure broadband services of their choosing, allowing people to enjoy a higher quality of life and participate fully in society, democracy, and the economy throughout their daily lives."

**SHLB's Mission<sup>2</sup>:** "SHLB advocates for policies and programs that enable anchor institutions to obtain and promote open, secure, high-quality broadband services to support connectivity and opportunity for all."

**SHLB Tagline:** Bridging the digital divide one anchor institution at a time.

**SHLB's Values<sup>3</sup>:** SHLB fosters collaboration among the public, private, and civic sectors to achieve our shared vision and mission. The ideals and principles set forth below guide our actions and interactions with our coalition members, anchor institutions, the broadband industry, government policymakers, and the public.

## **WE ARE:**

### **Mission-driven**

We passionately and optimistically pursue broadband and digital opportunity policies for anchor institutions and their communities.

### **Inclusive**

As a coalition of diverse members, we are collaborative and bring as many voices to the table as possible.

### **Visionary**

We are forward-looking, embrace new technologies, and recommend policies that maximize the opportunities for anchor institutions in an ever-changing digital landscape.

### **Nonpartisan**

We strive to build consensus, are respectful of others' positions, and avoid partisanship whenever possible.

### **Knowledgeable**

We dive deep into complex issues – using facts, research, and expertise to influence our policy recommendations.

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<sup>1</sup> A vision represents a future purpose, providing a mental picture of the aspirational existence that an organization is working to achieve.

<sup>2</sup> The mission is a concise and enduring statement of the reasons for an organization's existence today.

<sup>3</sup> Values are the ideals and principles that guide an organization's thoughts and actions and define its character.

### III. Accomplishments

SHLB staff conducted a detailed review of the previous strategic plan covering the years 2019-2021. The high-level results are as follows:

Membership: SHLB achieved its goal of recruiting 300-350 members. Successful tactics included hiring a director of membership, continuously inviting new members to join via our policy calls and webinars, and encouraging word-of-mouth referrals.

Organizational Sustainability: SHLB made progress on its organizational sustainability by:

- Placing two months of operating costs in a Dedicated Operating Reserves fund, toward the goal of having 6 months in Dedicated Operating Reserves;
- Adopting an executive director succession plan;
- Developing an internal document storage site;
- Launching a corporate sponsorship program;
- Initiating a Giving Tuesday fundraising campaign that generated about \$25,000 in 2021 and 2022;
- Holding spring events in 2019 and 2022 that each generated a \$16,000+ surplus; and
- Providing staff development training and courses for SHLB employees.

Advocacy: SHLB achieved a number of successful policy victories:

- Successfully opposed efforts to limit E-rate funding for fiber construction, and convinced the FCC to waive or extend several E-rate deadlines in the wake of the COVID-19 pandemic.
- Expanded the budget and improved operations of the FCC's Rural Health Care program.
- Expanded its policy groups from four to seven (adding new policy groups on pole attachments, broadband mapping and higher education) and selected co-chairs to operate each group.
- Published several policy reports on important broadband policy topics, such as EBS, USF reform and fiber deployment to anchors.
- Led a coalition of parties that filed a Petition for Rulemaking asking the FCC to make E-rate funding available to promote remote learning when schools closed due to the pandemic. This SHLB petition laid the groundwork for Congress to create the Emergency Connectivity Fund (ECF), which helped students, library patrons and their families access the Internet through anchor institutions.
- Held a successful 2021 workshop on the ECF program involving Sen. Ed Markey and FCC Chairwoman Jessica Rosenworcel, attended by over 300 people.
- Maintained its presence on Capitol Hill.
- Intervened in several court of appeals cases to uphold the constitutionality of the Universal Service Fund.

Communications: SHLB enhanced its visibility in various ways, including:

- Issuing regular press releases;
- Hosting calls/interviews with broadband media;
- Increasing mentions in media outlets by 373% over 3 years, including mentions in prominent publications like the Washington Post, Wall Street Journal, and Politico;

- Increasing its followers across multiple social media accounts; and
- Engaging in 15-20 public speaking events per year despite COVID-19 travel restrictions.

Lessons Learned: SHLB also gained valuable insight as it worked on implementing the strategic plan objectives:

- Advocacy work is the core of SHLB’s public interest work. As SHLB increases its fundraising, membership offerings, and communications, the organization must ensure that enough time and resources are available to deliver on its primary role in advocacy and policy work. Hiring the right staff to handle the organizational needs is essential to allowing SHLB’s policy staff the opportunity to increase their advocacy work.
- The organization must remain flexible to adapt to external circumstances in a fast-changing world. The COVID-19 pandemic dramatically highlighted the role of anchor institutions in community connectivity. In response, SHLB shifted its tactics to highlight the actions that schools and libraries could take to promote broadband connectivity at home.
- Unfortunately, the pandemic caused the cancellation of SHLB’s Annual Conference in 2020 and 2021, which constrained its revenue and growth. Fortunately, SHLB’s Conference attendance rebounded in 2022, and the market is expected to continue to grow as the federal and state broadband funding programs are rolled out. SHLB has been increasing its interactions with state broadband leaders who will be the key decision-makers in administering the BEAD program dollars. Other unforeseen circumstances may require course corrections in the future. Incorporating the strategic foresight framework<sup>4</sup> into SHLB’s operations planning could help prepare the organization to meet future opportunities.

## IV. Brief History and Financial Projections

### Background

SHLB was founded in 2009 as an informal coalition to support the \$4 billion Broadband Technology Opportunity Program (BTOP), which funded middle mile broadband connections to anchor institutions. The Bill & Melinda Gates Foundation and Microsoft provided initial financial support for a part-time coordinator to run the coalition. After achieving some initial success, the Coalition decided to incorporate and named its first Board of Directors in 2012, and the Gates and Knight Foundations provided grant support through 2018. In anticipation of the end of this foundation funding, SHLB focused its fundraising efforts on membership dues revenue and events such as its Annual Conference, which have been largely successful.

SHLB has grown from three to six staff and has successfully managed through a significant staff turnover in the past year. Our COO left the organization in April 2022, the Communications Manager departed in August 2022, and our Operations Manager left at the of 2022 due to illness. SHLB hired four new staff in

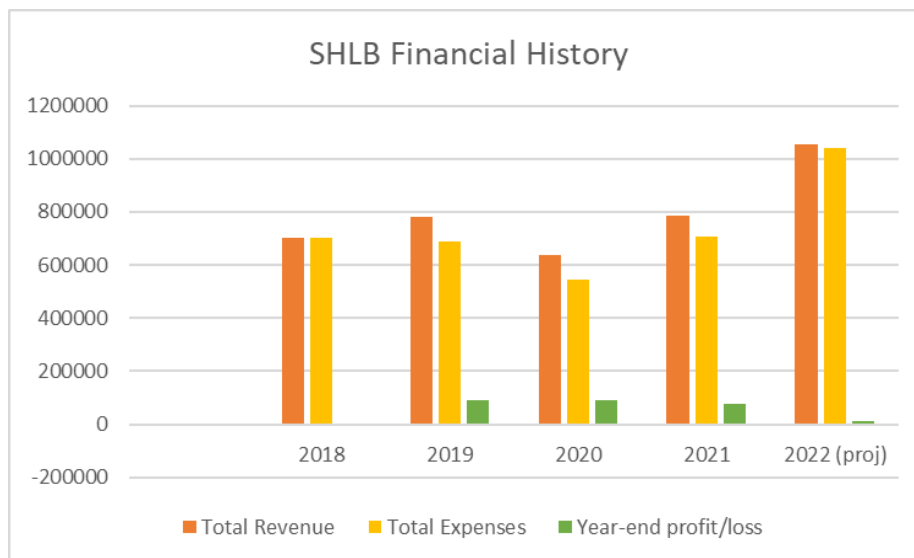
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<sup>4</sup> According to the Organisation for Economic Co-operation and Development, strategic foresight is “a structured and systematic way of using ideas about the future to anticipate and better prepare for change” by assessing potential futures and their associated challenges.

response (Policy Counsel, Operations Manager, Director of Marketing and Public Relations, and Chief Operating Officer), and is now fully staffed and well-positioned to carry out this Strategic Plan.

**SHLB’s financial situation is solid and modest growth is expected.**

SHLB successfully managed the transition to become a self-sustaining organization in 2019, largely by increasing our membership and membership dues revenue. Total revenue grew from \$701,671 in 2018 to \$1,136,805 in 2022. Membership has increased substantially to over 325 members, and dues revenue (the largest source of SHLB’s financial support) increased from \$233,400 in 2018 to \$729,619 in 2022. As a result, SHLB generated modest financial surpluses in 2019, 2020, 2021 and 2022, despite the cancellation of our Annual Conference in 2020 and 2021. The organization’s total net equity as of the end of 2022 was \$415,565, which includes \$262,500 in Dedicated Operating Reserves.



We project that SHLB’s revenue will continue to grow at a moderate level in the coming years. The surge in membership over the past two years during the pandemic is unlikely to continue at the same pace. Following a strong Annual Conference (“AnchorNets”) in 2022, we expect AnchorNets to expand slightly going forward. We expect that our revenues will be able to keep up with inflation and maintain our commitments to existing staff over the next three years. With more resources, SHLB would like to hire a research assistant, an additional policy advocate to work with Capitol Hill, an additional policy advocate to work with state broadband offices, a digital equity advocate, and an administrative assistant.

**V. Feedback from Stakeholders**

As a coalition made up of a diverse group of stakeholders from various backgrounds, regions, and institutions, it was imperative for SHLB to seek input from the wider community to inform its strategic planning. With the help of an external facilitator, SHLB collected feedback through an online survey of both members and non-members in early 2022. Here are some key takeaways from the responses:

- Respondents first heard about SHLB primarily through referrals (36%) and SHLB emails (19%).
- A large majority of respondents had a favorable view of SHLB, although there were a couple of unfavorable responses.

- Over half of respondents (53%) had a more favorable view of SHLB over the past year, while 46% responded that their view remained “about the same.”
- 80% of respondents viewed SHLB as effective in promoting its mission (Excellent 35%, Good 45%).
- Almost all SHLB members would recommend SHLB membership to other organizations.
- In answering how well SHLB succeeds in communicating its work, SHLB received high marks for its e-mails and policy calls, and lower marks for its social media and website.
- In ranking how well SHLB performs in policy advocacy, information sharing, relationship-building and visibility, survey respondents gave the highest marks for policy advocacy and lowest marks on visibility.
- SHLB’s top 3 strengths were named as (1) timely updates on policy developments, (2) member communications and information exchange, and (3) access to relevant policy leaders.
- Survey respondents suggested new offerings should include (1) case studies, toolkits, and how-to-guides of anchor connectivity projects and (2) establishing regional groups or discussion forums. There was mild interest in holding events outside of Washington D.C., and a small level of interest in an awards program.
- Members recommended hiring additional policy/advocacy staff and research staff.
- Respondents suggested SHLB’s biggest challenges are increasing its policy success and increasing its visibility.
- Respondents said SHLB is well-aligned with different types of stakeholders, although SHLB is seen as too far away from state broadband leaders.

The facilitator also conducted 10 individual one-on-one interviews with knowledgeable stakeholders, and a few themes emerged:

- SHLB received praise for its policy advocacy, its ability to hear from a variety of stakeholders and build consensus, its transparency, its expertise, membership engagement and its advocacy strategy (“unique ability to bring together diverse voices,” “punches above its weight,” “good tactics - not aggressive”).
- Some raised concerns about the lack of clarity around the SHLB mission. Others recommended expanding SHLB’s coalition work with other groups and issues (“green energy,” telehealth, smart cities, rural electric co-ops interested in broadband).
- Some also recommended increasing policy staff to take the burden off the current executive director’s shoulders, and some encouraged SHLB to diversify its staff.
- Additional recommendations:
  - increase collaboration with other organizations;
  - increase storytelling to advance our mission;
  - publish more white papers and reports to share our expertise;
  - avoid emphasis on wired connections and promote greater wireless policies;
  - more focus on measurable outcomes; and
  - expand opportunities with state and local government leaders.

The Task Force met by videoconference and in person in April 2022 to discuss SHLB’s vision/mission and to identify areas of growth. The Task Force made the following observations:

- We need to leverage broadband capacity of nearby anchor institutions to benefit surrounding communities. While SHLB promotes building broadband networks “to and through” the anchor institutions, the “through” component is underdeveloped. “Through” is an integral way to achieve digital equity and ensure continuity of connectivity across people’s daily journeys. Promoting “through” does not necessarily mean that the anchors become Internet Service Providers (ISPs); anchor institutions can partner with broadband providers and serve as the “gateway” to connecting residential consumers to affordable broadband.
- SHLB promotes both wired and wireless broadband connectivity. SHLB is technology-neutral but is not technology-blind. In some cases, fiber will be preferred over wireless, and in other cases wireless services will be more cost-effective.
- Participants also suggested adding to SHLB’s mission statement to clarify the importance of connectivity for people, not just the institutions.

## VI. The Plan

The 2023-2025 Strategic Plan builds on our previous strategic plan and reflects the feedback from the member survey, one-on-interviews and the task force. The 2018-2021 Strategic Plan identified three pillars of work:

1. National Leader for Community Anchor Institutions
2. Capacity and Sustainability
3. Membership Engagement

The Task Force recommended retaining and updating these three pillars and adding the following fourth pillar:<sup>5</sup>

4. Visibility: SHLB will expand its communications and public relations efforts to tell stories and publicize successful anchor institution programs.

Each pillar establishes an overarching goal for a particular area of focus and includes key objectives that support the larger goal. The listed tactics are the methods that the SHLB staff *may* choose to use to pursue these objectives, drawing upon their expertise and the policy environment.

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<sup>5</sup> The Task Force initially recommended a fifth pillar focused on creating a resource hub to include materials (such as toolkits, how-to guides, research reports and information on new technologies, etc.) to help anchor institutions serve the broadband needs of their communities. Upon further reflection, some SHLB Board members and SHLB staff raised questions about the feasibility of the resource hub. Other organizations already provide toolkits to promote digital equity (such as NDIA and the National Broadband Resource Hub), and this work may depart from our advocacy mission. Instead, we plan to increase our efforts to engage our members in our advocacy work, such as by inviting SHLB members to participate in our meetings with government policymakers and launching letter-writing campaigns by our members on important issues.

## **Pillar #1: National Leader for Anchor Institutions**

### **Maximize SHLB's influence as the national leader on anchor institution broadband policy and funding.**

SHLB has achieved several policy victories in the E-rate, Emergency Connectivity Fund (ECF) and Rural Health Care programs and had a positive influence on several broadband funding programs created by Congress. There are many more policy issues that impact the digital divide, and SHLB has expanded the number of issues that it covers (including broadband mapping, higher education, and spectrum) which will require additional work and resources.

The feedback received from the stakeholders and task force is that SHLB is having excellent results in its policy work, and they encouraged SHLB to do even more. The Coalition will continue to pursue a non-partisan, provider-neutral, mission and data-driven approach that develops realistic and forward-looking policy solutions and embraces the benefits of new technologies.

#### **Key objectives:**

- A. SHLB will seek to impact 3-5 federal policy proceedings per year.
- B. SHLB will build on its expertise on the various federal broadband funding programs and advise anchor institutions on how they can benefit from such funding, either as a direct recipient or working in partnership with other entities that will be the direct recipient.
- C. SHLB will build on its relationships with federal and key state lawmakers to ensure the organization has a seat at the table in discussions that impact anchor institutions.
- D. SHLB will leverage member expertise to advocate for the interests of anchor institutions as states develop their broadband plans and grant application processes.
- E. SHLB will publish at least one research report a year that provides essential information to support its key policy recommendations.
- F. SHLB will advocate for the continuation and reform of existing broadband programs that reflect the important role served by anchor institutions.
- G. SHLB will engage with its membership on a more regular basis to participate with SHLB staff in our advocacy efforts.
- H. SHLB will provide its membership with resources and tools to elevate SHLB's policy and advocacy work.

#### **Tactics *may* include:**

- Continuing to develop and publish an annual policy roadmap that highlights SHLB's focus and priorities for the year.
- Filing comments in Federal and state policy proceedings.
- Holding 30-40 meetings with policymakers per year.



- Hosting regular complementary webinars that explore policy issues or explain the process for obtaining broadband funding.
- Conducting Congressional briefings and other educational sessions as necessary to educate Congressional staff on policy issues of importance to anchor institutions.
- Providing recommendations to state leaders about how to include anchors in their mapping efforts and deployment and digital equity plans.
- Seeking opportunities to testify in Federal and state proceedings.
- Continuing to defend the Universal Service Fund against constitutional challenges filed in the various federal courts of appeals.
- Inviting key policymakers to speak at our annual Conference and other events.
- Inviting SHLB members to participate in meetings with government policymakers.
- Inviting SHLB members to sign letters or file individual comments supporting SHLB's policy recommendations.
- Creating a place for digital tools and resources on SHLB's website to assist members to support SHLB's advocacy work.

## **Pillar #2: Capacity and Sustainability**

### **Solidify SHLB's capacity and sustainability to enhance the organization's long-term impact.**

SHLB survived the end of Gates Foundation support in 2018 and generated modest surpluses each year since then. SHLB's staff has grown from 3 to 6 personnel in the past three years. The Coalition placed approximately two months of operating revenue in its Dedicated Operating Reserves, moving closer toward its goal of having six months of operating reserves.

As discussed below, SHLB's membership participation and growth have been steady but may grow more slowly in future years, and its Annual Conference revenue is expected to increase somewhat. SHLB plans to seek additional revenue to expand its operations, add staff, and strengthen its reserves to ensure its long-term viability.

#### **Key objectives:**

- A. SHLB will increase the diversity of its staff, Board, and membership, strengthen the inclusivity of its organizational culture, and advance equity in its social practices.
- B. SHLB will pursue additional revenue opportunities.
- C. SHLB will follow strict accounting, financial affairs, and record-keeping guidelines.
- D. SHLB will strengthen its organizational operations and procedures, including its code of ethics.
- E. SHLB will increase staff capacity and expertise, as funding allows.
- F. SHLB will seek to have four months of funding in its Dedicated Operating Reserves by the end of 2025.

**Tactics *may* include:**

- Reviewing SHLB’s Board matrix to determine opportunities to increase diversity.
- Developing a fundraising plan.
- Devoting more of the executive director and COO’s time to fundraising.
- Exploring foundation funding.
- Increasing membership dues while remaining attentive to price sensitivity and perceptions of value.
- Creating a high-level Advisory Council.
- Developing connections with the financial (Wall Street) community to find potential donors.
- Expanding SHLB’s annual spring event or holding other regional events.
- Recruiting additional corporate sponsors, with the goal of adding three more corporate sponsors by 2025.
- Establishing a workflow for maintenance of SHLB’s internal documentation.
- Approving a more detailed executive director succession plan.
- Exploring whether to change from a 501(c)(3) organization to a 501(c)(4) or 501(c)(6).
- Conducting an outside salary review of SHLB employees compared to equivalent organizations.
- Implementing an unlimited paid time off (PTO) strategy.
- Reviewing employees’ job descriptions each year and making updates as needed.
- Performing regular reviews of the organization’s employee benefits package, including health care insurance and retirement plans.
- Providing training opportunities for staff.
- Hiring additional staff as resources allow, such as a policy advocate who can leverage SHLB’s partnerships on key state issues, a research assistant, a financial affairs director, a Congressional advocate, a fundraiser, and a public relations firm to highlight anchor institutions and SHLB’s work.

### **Pillar #3: Membership Engagement**

**Increase SHLB’s membership growth and engagement.**

SHLB’s focus on recruiting and retaining its members is one of the principal reasons for SHLB’s growth. We are pleased that we reached the goal of acquiring 300-350 members as set forth in our previous strategic plan. SHLB succeeded by implementing a variety of membership recruitment strategies, especially with hiring a director of membership, tracking and following up with webinar attendees, instituting a “member-get-a-member” campaign, and asking Board members to recruit new members. Word-of-mouth referrals were found to be most successful in recruiting new members, while cold calls/emails to participants in the E-rate and Rural Health care programs were not as successful. A significant number of new members joined SHLB because the pandemic revealed the need for greater broadband connectivity.

SHLB also put into place a number of steps to retain existing members, such as by scheduling regular check-in calls with members, reviewing metrics demonstrating their participation in SHLB events, and simplifying the new member onboarding process.

**Key objectives:**

- A. SHLB will aim to double its membership to 600 members by the end of 2025.
- B. SHLB will work to limit its attrition rate of member non-renewals to less than 5% per year.
- C. SHLB will continue to increase members' access to policymakers.
- D. SHLB will give its members more of an opportunity to interact with and meet government leaders.
- E. SHLB will provide additional opportunities for member visibility.
- F. SHLB will enhance and articulate its value to current and prospective members within the dynamic digital inclusion ecosystem.

**Tactics *may* include:**

- Adding greater incentives to generate more “word-of-mouth” membership referrals.
- Enlisting former senior policymakers to provide testimonials about SHLB’s effectiveness.
- Continuing to work with SHLB Board members individually to identify potential recruits.
- Testing multi-year memberships and trial memberships.
- Reinstating a membership recruitment task force of existing SHLB members.
- Continuing to host educational webinars at no charge to the public and conducting outreach to non-member registrants.
- Attending and speaking at other conferences and events to spread the word about SHLB’s work.
- Increasing efforts to touch base with members each month.
- Calling upon existing members to reach out to members who are on the fence.
- Expanding opportunities for peer-to-peer connections.
- Enhancing policy groups to maximize opportunities for member engagement and connection.
- Transitioning to a new member database that will ease the burden of recordkeeping.
- Reinstating the monthly “Calls with Policymakers” series.
- Formalizing the SHLB Spotlight segment on biweekly member calls.

**Pillar #4: Visibility****Elevate the visibility of anchor institutions’ efforts to solve the digital divide with the general public.**

SHLB has emphasized the importance of a strong communications component from the beginning. SHLB’s second employee was a communications manager, and SHLB has often arranged interviews with reporters and generated quotes in broadband trade journals and occasionally in nationally known publications.

To date, SHLB's communications efforts have been designed to support its policy initiatives and advocacy. However, the feedback from survey respondents indicated that many SHLB members were unaware of SHLB's publicity and believe SHLB could be doing more to highlight the value of anchor institutions in the media outside the DC beltway. Survey respondents also gave SHLB lower marks on its social media presence and website.

While SHLB's communications work has always been integral to supporting its policy work and event marketing, the recommendation is to broaden SHLB's public relations and marketing efforts by creating a separate pillar focused on increasing the visibility of anchor institutions, not just SHLB. Having said this, SHLB will need to continue to market the SHLB brand to attract more members and conference attendees, which are the foundation of SHLB's financial growth and sustainability.

**Key objectives:**

- A. SHLB will develop and highlight examples of real-world anchor institution success stories.
- B. SHLB will increase its roster of spokespeople to promote SHLB's work.
- C. SHLB will build on the marketing and programming for its Annual Conference and other events.
- D. SHLB will strengthen its messaging about the impact of its work and the important role of anchor institutions in community connectivity.
- E. SHLB will continue to promote the SHLB brand with state policymakers and the general media.

**Tactics *may* include:**

- Surveying the communications and public relations work by other public interest groups and associations.
- Creating a work plan that will identify reports or other materials that SHLB could publish to demonstrate the value of anchor institutions in promoting broadband connectivity.
- Interviewing anchor institutions to obtain their stories and publish a report highlighting their work.
- Publishing blogs, podcasts or articles that highlight an anchor institution's success or challenges with a specific federal policy or legislation to demonstrate the impact of these policies and the importance of CAIs.
- Developing a portal on the SHLB website focused on anchor institution broadband issues and success stories.
- Identifying "social influencers" within the broadband and anchor institution space.
- Developing toolkits for anchor institutions to act as ambassadors of SHLB's work and the importance of anchor institutions.
- Expanding our event marketing efforts to attract more attendees.
- Adding a trade show component to the Annual Conference.
- Contracting with a public relations firm to generate greater visibility for SHLB's work.
- Implementing bolder launch strategies for new publications.

- Expanding SHLB's Wireless Policy Group (fka the Anchor Connectivity Group), which convenes members to discuss how anchor institutions are deploying wireless networks to provide affordable service to unserved and underserved homes.
- Building complementary partnerships with organizations within the digital access community to increase our capacity (especially for content generation) and amplify our impact.

The SHLB Coalition serves an important public mission to bring open, affordable, high-quality broadband to anchor institutions and their communities. By working together and by implementing this Strategic Plan, we intend to solve the digital divide one anchor institution at a time.

Adopted by the SHLB Coalition Board of Directors. July 12, 2023.

# Appendix

## Strategic Planning Process

The strategic planning process was led by SHLB Chair Rachelle Chong and chief operating officer Emily Olson, with assistance from executive director John Windhausen and operations coordinator/director of operations Meghan Lasswell. Ms. Chong, Ms. Olson, and Mr. Windhausen assembled a strategic plan task force of 11 people consisting of SHLB members and non-SHLB members with an array of expertise to provide input on the organization’s future. SHLB hired Dr. Elizabeth Scott with Brighter Strategies in early 2022 to facilitate the strategic planning discussions. Dr. Scott led three video conference calls with task force members in advance of the in-person retreat:

- A. February 2022: Kickoff conversation & introductions
- B. March 2022: Summary and analysis of SHLB stakeholder feedback
- C. April 2022: Discussion of SHLB’s mission and vision

The kick-off conversation on February 22, 2022 included task force member introductions and an overview of SHLB’s progress since the last strategic plan. A presentation highlighted areas where SHLB intends to maintain its success, including membership recruitment, coalition-building, and information gathering and exchange. It also suggested building off this success by increasing SHLB’s visibility, enhancing relationships with policymakers and expanding the Annual Conference. SHLB shared some lessons learned about challenges with staff capacity, the value of policy work in driving membership, and past objectives that did not yield the desired results.

The second task force call on March 23, 2022 began with a summary of the stakeholder feedback that Dr. Scott and her team had collected through several methods of outreach. Brighter Strategies hosted a 90-minute virtual focus group with the SHLB Board, conducted 10 one-on-one interviews with members of the broadband and anchor institution community, and developed a survey that collected feedback from over 300 stakeholders.

SHLB staff and task force members analyzed this stakeholder feedback using the SOAR framework (Strengths, Opportunities, Aspirations, and Results).

<p><b>Strengths:</b></p> <p>Policy</p> <ul style="list-style-type: none"><li>● Very smart and technically savvy (the “geeks in the room”); knowledgeable on policy; seen as experts by members</li><li>● Effective in policy work</li><li>● Building relationships with policy makers, moving the conversation forward</li></ul>	<p><b>Opportunities:</b></p> <p>Policy</p> <ul style="list-style-type: none"><li>● Moving into new spaces if desired (e.g., green energy, smart city, agriculture, energy efficiency, public housing, public health)</li><li>● Consider including wireless in solutions to be explored, rather than focus on wired</li><li>● Increase visibility at the state and local</li></ul>
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<p>Coalition-Building</p> <ul style="list-style-type: none"> <li>● Executive Director is very skilled at facilitating and convening diverse groups – his presence makes a difference</li> <li>● Getting a diverse group of people together, who can disagree but still work together for common goals</li> <li>● Unique group – works with “embedded” institutions in communities, not just individuals or individual issues (e.g., e-rate). “Should be seen as the standard.”</li> <li>● The coalition is closely aligned with their constituencies (member only response data from survey)</li> </ul>	<p>level</p> <ul style="list-style-type: none"> <li>● Develop resources focused on anchor connectivity projects for members</li> </ul> <p>Organization/Mission</p> <ul style="list-style-type: none"> <li>● With quick growth, need increased clarity about who they are and what they are doing – what are the issues they are focused on (e.g., (tele)health is not a clear focus, but could be a great opportunity)</li> </ul> <p>Membership</p> <ul style="list-style-type: none"> <li>● Continuing to expand coalition members</li> <li>● Expanding with non-traditional providers (e.g., rural electric co-ops)</li> <li>● Expand membership to nonmember referrals</li> <li>● Evaluate the value and cost of membership dues</li> </ul> <p>Visibility</p> <ul style="list-style-type: none"> <li>● Could be more present in media (e.g., publishing with Common Sense/collaborating more with Benton on white papers and/or reports, more of a social media presence)</li> <li>● Could increase sharing of stories, successes – also this would clarify their work, mission, constituencies, etc.</li> </ul>
<p><b>Aspirations:</b></p> <ul style="list-style-type: none"> <li>● Increase staff to allow more growth (specifically policy and advocacy staff)</li> <li>● Clarify mission, vision, and strategies to promote better understanding within and without the organization</li> <li>● Build on and expand relationships at</li> </ul>	<p><b>Results:</b></p> <ul style="list-style-type: none"> <li>● Increase partnerships with state and local organizations (metrics to be developed) <ul style="list-style-type: none"> <li>○ Discuss expansion vs. focus on few areas</li> </ul> </li> <li>● Choose and focus on some DEI outcomes</li> </ul>

<p>different levels – federal, state and local</p> <ul style="list-style-type: none"> <li>● Potentially clarify a few areas of focus and stay with those</li> <li>● Increase diversity among constituents, members, and internally</li> <li>● Increase internal and external diversity, equity, and inclusion (DEI) efforts in a variety of ways</li> <li>● Increase financial stability and resources (could be tied to expanding initiatives at state and local levels; expand sources of revenue)</li> <li>● Provide more “onboarding” material for new members (one-pager)</li> <li>● Investigate where data already exist to analyze in efforts or where data could be gathered to learn more and demonstrate impact</li> </ul>	<p>(metrics TBD)</p> <ul style="list-style-type: none"> <li>● Improve financial resources and stability (metrics TBD)</li> <li>● Assess staff growth needs and increase staff (metrics TBD)</li> <li>● Increase media presence (metrics TBD)</li> </ul>
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On April 4, Brighter Strategies led a discussion of SHLB’s mission and vision to determine if it needed any revisions. The task force members did not propose changing the mission statement but did suggest certain clarifications, such as:

- While SHLB promotes building broadband networks “to and through” the anchor institutions, the “through” component is underdeveloped. Promoting “through” does not necessarily mean that the anchors become Internet Service Providers (ISPs); anchor institutions can partner with broadband providers and serve as the “gateway” to connecting residential consumers to affordable broadband.
- SHLB promotes both wired and wireless broadband connectivity. SHLB is technology-neutral but is not technology-blind. In some cases, fiber will be preferred over wireless, and in other cases wireless services will be more cost-effective.
- Participants also suggested adding to SHLB’s mission statement to clarify the importance of broadband for people, not just the institutions. For instance, “SHLB’s mission is to support policies and practices that enable anchor institutions in their communities to have open, affordable, high-quality broadband so that all people can access modern digital services. (new language in bold)

On April 19 and 20, SHLB staff, the task force members, and Dr. Scott convened in Washington D.C. for an in-person planning retreat. During this time, participants engaged in various collaborative exercises



to envision SHLB's future, develop bold steps to achieve it, and create strategies to support implementation.

Following the in-person planning retreat, SHLB presented drafts of the strategic plan to the task force and SHLB Board for their input. After several rounds of revisions, the plan was presented to the SHLB membership at the 2022 Annual AnchorNets Conference in October. SHLB staff incorporated member feedback into the final version before submitting it for Board approval in December 2022.

**SHLB owes an enormous debt of gratitude to the eleven task force members who volunteered their time and knowledge to help chart the course for SHLB's future:**

- Cindy Aden, University of Washington, iSchool
- Chip Byers, MOREnet
- Rachelle Chong, Law Firm of Rachelle Chong
- Elwood Downing, ELAE Enterprises
- Earnie Holtrey, Indiana Broadband Office
- Dan Kettwich, ADS Advanced Data Services
- Carol Matthey, Matthey Consulting
- Philip Neufeld, Fresno Unified School District
- Kitty O'Connor, ENA
- Jeff Sharp, Manitou Media
- Kathleen Sullivan, Washington State Library

At the SHLB AnchorNets Conference in October 2022, SHLB staff and Task Force members presented a draft of the Strategic Plan to the full Board. Some Board members raised questions about the feasibility of the Broadband Resource Hub articulated in Pillar 4. Questions were also raised about the vision and mission statement, and the Board also discussed the need for a shorter, pithy tagline to summarize our work. The Board decided to authorize Lauren Moore to chair a small group (to include Phil Neufeld and Cindy Aden) to review the Strategic Plan and suggest modifications.