A planning effort was undertaken by the Association for Applied Psychophysiology and Biofeedback (AAPB) for the purpose of developing a coherent, sustainable strategy to promote AAPB’s long-term organizational and fiscal health. This article emphasizes the importance of considering environmental change and client diversity in the strategic planning process and identifies the areas of Science, Education and Training, Professional Support, and Technology as themes that will define the Association. Recommendations for service delivery and continuous re-evaluation of strategy are offered.

Introduction

It only takes a glance at the professional literature to recognize that if we don’t keep up, we are destined to fall behind. A fascinating case in point is the report of a recent study in which a microelectrode array was implanted in the primary motor cortex of a tetraplegic man whose 3-year paralysis resulted from a high spinal cord transection. The research employed what Biofeedback readers will recognize as a classic biofeedback protocol to harness cortical spiking, enabling the subject to move the cursor on a computer, operate a television, and open and close a prosthetic hand (Hochberg et al., 2006).

So what, you might ask, does this compelling work have to do with the far less romantic subject of a strategic planning effort within a professional association? The answer is, simply, everything. The report of this study is the tip of the proverbial scientific iceberg and may well represent the emergence of a paradigm shift in the basics of what drives the field of applied psychophysiology and biofeedback. But more than that, it is evidence that change, whether it is the result of scientific discovery, the demographics of prospective members, world politics, or the economy, must be considered if we as professionals and the Association for Applied Psychophysiology and Biofeedback (AAPB) as an organization are to remain current and viable.

In the fall of 2005, the AAPB Board of Directors considered the state of the organization and faced the reality that AAPB is not immune to the trends affecting other professional associations. Scanning the websites and blogs of a sampling of national professional organizations reveals the common experience of stagnant growth, declining member retention rates, increasing operating expenses, and diminishing revenues. What distinguishes the organizations that survive from those that meet their demise is a strategic response that is sensitive to the changing environments in which they operate (Hamilton, 2006). With this in mind, the AAPB Board commissioned a Strategic Planning Task Force (see Appendix 1) with the charter to not only target specific problems, but establish a coherent, sustainable strategic process to promote AAPB’s long-term fiscal and organizational health. To follow is the report of the work of that task force.

The Process

In order to think strategically about AAPB’s future and address potential obstacles to its viability, it was necessary for the Task Force to first embrace the axiom that no matter how creative and visionary our ideas might be, they would be for naught if AAPB does not operate effectively as a business. To define AAPB as a business dependent on the effective delivery of a range of products to specific markets may not seem particularly profound, but Association members and leadership have traditionally shied away from this rather mundane depiction. It is, however, an important reality, and it was with this fundamental understanding that the Task Force convened at AAPB headquarters in March of 2006 for
the purpose of developing a framework on which to build the Association’s future.

The Task Force initially considered the questions: (1) what are our core products and markets, (2) who are our target customers/clients, (3) how can we create greater value through the expansion of products and markets, and (4) are there alternatives to the traditional membership model that would support this effort? Ideas were subsequently developed through consensus-based discussions, following a process that included environmental scanning, visioning, branding, and development of strategic initiatives.

**Environmental Scan**

The environmental scanning component of the strategic initiative was, in essence, an organizational health assessment. It served to clarify the current state of the organization and to identify strengths, weaknesses, opportunities, and threats. It also identified trends, both internal and external that would impact the development of strategy. For the purposes of strategic planning, a trend is a gradual, long-term change in the forces shaping the future of an organization. Understanding emerging trends in the operating environment facilitates a longer-term view of current systems and the identification of changes necessary for the health and longevity of an association (Dalton, Jarratt, & Mahaffie, 2003). The Task Force identified 7 key conditions or trends that served as a backdrop for its deliberations about strategy. They are as follows:

1. AAPB is currently solvent, but it cannot endure declining membership, low annual meeting attendance, and decreasing income for an indefinite period and remain solvent.
2. AAPB has endeavored to meet the increasingly varied needs of a diverse membership, straining its resources and blurring its identity and mission.
3. AAPB has an established infrastructure, valued traditions, an institutionalized culture, and effective processes that provide a basis for strength.
4. The Board has historically emphasized cost containment in its approach to the financial management of the association with limited focus on expanding markets and products to increase revenue.
5. Global economic factors, including a volatile economy, competition from other professional organizations, declining institutional support for professional association affiliation, the high cost of travel, and limited personal resources, impact AAPB revenues.
6. The emergence of other societies with missions similar to that of AAPB has fractionalized the biofeedback/applied psychophysiology community, created competition for the same members, and complicated efforts toward the shared goal of advancing the field.
7. AAPB exists in a competitive marketplace wherein its consumers have begun to evaluate the extent to which the organization is relevant and dollars spent are an “investment.”

**Visioning**

It is told of Albert Einstein that he thought in simple, physical pictures before he translated his visions into the theories of quantum physics that changed our understanding of the universe (Kaku, 2004). His theory of general relativity grew from his purposeful visioning of himself hurtling through the universe in a box traveling on a ray of light. This method of thinking enabled him to utilize both his imagination and analytical abilities to formulate constructs.

The process of visioning has become standard practice in strategic planning efforts. Visual techniques help to link possibility thinking, intuition, and current realities, all of which are critical to strategic thinking (Sanders, 1998). The AAPB Task Force employed a visioning process as an initial component of its work. A sample of some 30 AAPB Board members, past presidents, and active members of the Association were asked to write a “personal vision or scenario for AAPB in 10 years.” They were asked to imagine how they would like AAPB to look and, in their vision, attempt to strike a balance between desired possibilities and what is probable, using external trends and issues as they understood them as a filter. Nearly all of those sampled responded, and the provocative material received was synthesized into a statement that best reflected AAPB’s ultimate purposes. The vision statement adopted by the Task Force provided a conceptual beginning for the strategic thinking process and reads as follows:

AAPB is the trusted resource for information and support in the areas of mind-body science, applied psychophysiology, and biofeedback, serving its members, health care professionals, the media, and the public.

**Branding—Identification of Themes and Processes**

An organization’s brand is what distinguishes it from others and is the result of products, processes, and initiatives that serve to actualize its vision. Effective branding concentrates on which differentiating ideas will set an organization apart from the pack, and serve to establish an emotional connection between it and its clientele. Such distinguishing
characteristics as having a heritage, owning a discernible attribute, and becoming the preference of a particular consumer group can create a unique and saleable identity for an organization (Trout & Rivkin, 2000).

Task Force members agreed that an effective strategic plan for AAPB must be predicated on fundamental, easy-to-articulate themes that distinguish the organization and represent its vision and overall mission. These themes are essentially AAPB’s brand and are intended to define what the organization does or for what it is known. The themes were conceived to provide a basic template or map to guide all AAPB activities and represent a synthesis of ideas contained in the sample of visioning statements. The Task Force recommended that everything AAPB does going forward should support one of the following themes:

- Science
- Education and Training
- Professional Support
- Technology

The discussion of themes also led to the identification of a number of important processes or mechanisms that are essential to AAPB’s overall strategy. These processes represent the means by which the themes become translated into initiatives or action items and are as follows:

- Technological Optimization: utilizing state-of-the-art technology, i.e., the Internet and AAPB’s website
- Collaboration: exploring opportunities to work cooperatively with other organizations, interest groups, vendors, etc.
- Advocacy: action to support specific needs of the membership and AAPB’s general mission
- Communications: publications, correspondence, marketing/promotion
- Annual Meeting: optimizing the meeting as a source of revenue and support mechanism for the general themes
- Organization Development: continuous evaluation of AAPB structure, processes, procedures, and management towards optimal organization health and efficacy
- Services/Products: what AAPB sells or offers that adds value

Strategic Initiatives

With the strategic themes and processes in place, the Task Force developed a list of 86 initiatives from which 10 were identified as priorities. Many of these initiatives were inspired by the content of the visioning statements, which were rich with creative ideas for advancing the Association. The complete list of proposed initiatives is available from the author upon request.

The 10 prioritized initiatives were envisioned as the role-out elements of the desired coherent strategy to promote AAPB’s long-term fiscal and organizational health. They are listed below with a notation of the theme(s) they support:

1. Restructure the AAPB committees to function as theme-focused work groups [all themes].
2. Develop a Clinician’s Tool Kit with information to assist clinicians in acquiring insurance coverage, assistance with coding, and practice management information [Professional Support theme].
3. Promote the university curriculum development initiative and assume responsibility for accreditation [Education, Professional Support themes].
4. Develop new educational programs that can be offered using new technology, such as web cast seminars, online education, and establishing of an online “Biopedia,” an encyclopedia of terms specific to psychophysiology and biofeedback [Education, Technology themes].
5. Restructure the Annual Meeting to simplify the delivery of continuing education recognition, the cost of attendance, meeting locations [all themes].
6. Add sessions and/or keynote presentations at the Annual Meeting on topics related to technology [Technology, Education themes].
7. Partner with pharmaceutical companies for funding of biofeedback research to showcase the efficacy of biofeedback as part of an overall treatment regimen [Professional Support, Science themes].
8. Reach out to members and potential members to provide more information about existing member services and to create a member-friendly culture, with new member welcoming, posting new member photos by way of introduction, etc. [Professional Support theme].
9. Advocate for support of biofeedback research and advances in biofeedback technology [Science, Technology themes].
10. Acquire and disseminate information on innovations in biofeedback technology [Education, Technology themes].

Table 1 illustrates how AAPB’s strategic themes function as objectives supported by the processes or mechanisms that translate them into action. Each cell contains strategic initiatives that serve one or more objectives and that may be supported by a particular process/mechanism. Ultimately, the objectives, processes, and strategic initiatives promote AAPB as the “trusted source for information and support in...
the areas of mind-body science, applied psychophysiology, and biofeedback.”

**Implementation**

At the April 2006 AAPB Board of Directors meeting, the Strategic Planning Task Force recommended, and the Board approved, the adoption of the theme-driven strategy proposed herein. The Board directed that all current and future AAPB activities be driven by and relate to the themes of Science, Education and Training, Professional Support, and Technology. The Board also endorsed the implementation of the 10 strategic initiatives prioritized by the Task Force and assigned responsibility for carrying them forward.

The influence of AAPB’s strategic themes is already evident in a number of key processes and initiatives. The 38th Annual Meeting is entitled *Biofeedback: Challenging the Boundaries of Technology* and will utilize as well as highlight new technologies in its continuing education delivery and content. Curriculum models for university-based training programs in applied psychophysiology and biofeedback have been adopted by the Board, and a committee is working on the next step of developing an accreditation process. In addition, the Clinician’s Tool Kit project is off the drawing board and should go to press before the end of the year. And for evidence of the promotion of a member-friendly culture, outreach, and professional support, look no further than www.aapb.org.

**Conclusions and Recommendations**

This report has emphasized the importance of vigilance and adaptation in a volatile and changing environment. The implication is that if we develop and implement a strategy that is sensitive and responsive to change that the health of the organization is somehow assured. But in fact, strategy-focused organizations must recognize that articulating and implementing a strategy is only the beginning, and that continuous re-evaluation of that strategy is critically important (Kaplan & Norton, 2001). Only time will tell whether the 86 critical initiatives recommended by the Strategic Planning Task Force will translate into a healthy, financially strong AAPB that becomes the one described in

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Consideration of Change and Diversity

the new vision statement. What is certain is that a continuous taking of the pulse of the Association—asking the question “are our processes efficient, effective, in concert with our themes, and sensitive to a dynamic environment”—is necessary for AAPB’s long-term health to be ensured.

This Strategic Planning Initiative was considered the beginning of a process intended to guide future efforts to refine AAPB’s strategy and related initiatives. The Task Force recommends a continuous, strategic organization development effort that draws on the expertise and resources of the professional association management team now in place. It also endorses the further exploration of methods through which AAPB can add value by expanding beyond the traditional membership model in the way it grows its products, services, and markets. The diversity of AAPB’s clientele—its membership, potential members, and those that may purchase products a la carte—suggests the need for a marketing strategy that enables the Association to effectively address the varied and specific needs and interests of these individuals. A “long tail” marketing approach that unbundles products and services and takes advantage of the power in the distribution under the curve of people in the market place who have narrow and diverse needs may well be the answer (De Cagna & Notter, 2006). Such an approach capitalizes on the power of the Internet, which AAPB is well-positioned to utilize.

Ultimately, AAPB must strive to be a lean, hypervigilant, environmentally responsive, technology-driven entity with visionary leadership that can adapt in a rapidly changing world.

Appendix 1

The AAPB Strategic Planning Task Force composition:
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