



## Washington Metropolitan Chapter Community Associations Institute

# 2015-2017 Strategic Plan



**Prepared In Conjunction With**



*Perpetual Movement to Results*

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## **Table of Contents**

<b>Purpose</b> .....	<b>2</b>
<b>Scope</b> .....	<b>2</b>
<b>Background</b> .....	<b>2</b>
<b>Strategy Framework</b> .....	<b>3</b>
Themes .....	4
<b>WMCCAI’s Strategic Structure</b> .....	<b>4</b>
<b>Core Competencies &amp; Objectives</b> .....	<b>5</b>
Advocacy .....	5
Education.....	6
Member Development .....	7
Member Services .....	8
<b>Taking the Next Steps</b> .....	<b>9</b>
Performance Measurement System .....	9
Comprehensive Set of Prioritized Initiatives.....	9
Communications Strategy .....	9
<b>Appendix A – The Advance</b> .....	<b>10</b>



## Purpose

This document sets out the Vision and Mission Statements of the Washington Metropolitan Chapter of the Community Associations Institute (WMCCAI). It also identifies the Chapter's core competency goals, objectives, action strategies, initial Key Action Steps, and success measures for implementation.

## Scope

This plan is focused primarily on 2015 through 2017 with the realization that some objectives and accompanying action strategies may extend beyond as necessitated by Board priorities and available resources. The Board's intent is to review and update this plan every 2 years.

## Background

WMCCAI serves the educational, business, and networking needs of the community association industry throughout parts of Maryland and Virginia and the entire District of Columbia. Members include professional managers and community association volunteer leaders from condominium, cooperative, and homeowners associations, as well as those who provide products and services to community associations.

As of January 2015, WMCCAI has nearly 2,900 members, including 300 businesses, 1,000 professional managers (from 95 management companies), and more than 1,500 community association volunteer leaders.

## The Process

WMCCAI is a large, growth-oriented chapter serving many constituencies—community association leaders, managers, management companies, and business partners. It became apparent in early 2014 that the Chapter would benefit from a targeted, innovative, and far-reaching strategic plan addressing its complex and challenging environment.

Because WMCCAI has so many dedicated volunteers, each with rich contributions to make, the Board employed C Parker Consulting, Inc., after a competitive bidding process, to assist the Chapter's Strategic Planning Committee ("SPC") with the development of a new Strategic Plan. Planning for the process commenced in summer 2014 with in-depth interviews with key actors and a general membership survey. These were intended to identify potential issues and plan for the larger conference—an "Advance"—to build participation and buy-in, as well as to identify tensions and invite ideas. The Advance, in which nearly 40 chapter leaders joined in a vibrant session to analyze the environment, identify challenges, consider stakeholders and ultimately, to draft Vision and Mission Statements with tentative goal areas. Additional intentions of the Advance were to allow members to coalesce around the value of WMCCAI, build unity rather than factions, and reinforce the commonality of our interests in WMCCAI's success. Using interactive group processes, including several round robin events, everyone was able to offer input and start the process moving. Results of the surveys and the Advance are included in Appendix A.



This background enabled the SPC, which met extensively in 2014 and early 2015, to formulate refined Vision and Mission Statements; develop goals by WMCCAI competency; and identify objectives, success measures, and action steps to make the goals a reality.

In the course of their work, the SPC re-examined WMCCAI’s core competency areas and developed more up-to-date, descriptive, and accurate names for the competencies. For example, Outreach was identified as being two-fold, Member Development and Member Services. Advocacy replaced Legislation to more accurately describe what we do. Finally, a truly foundational competency was identified that actually cuts across all the other competencies: Relationships. WMCCAI builds and maintains relationships in all its competency areas and the committee believes that this needed to be emphasized in our Strategy Map.

## Strategy Framework

As part of this process, a graphic was chosen to capture the spirit of WMCCAI its stakeholders and the components of the Strategic Plan. The graphic on the following page depicts our Vision, Mission, Who We Serve and What We Do (via our core competencies).

Figure 1 – Strategy Framework





## Themes

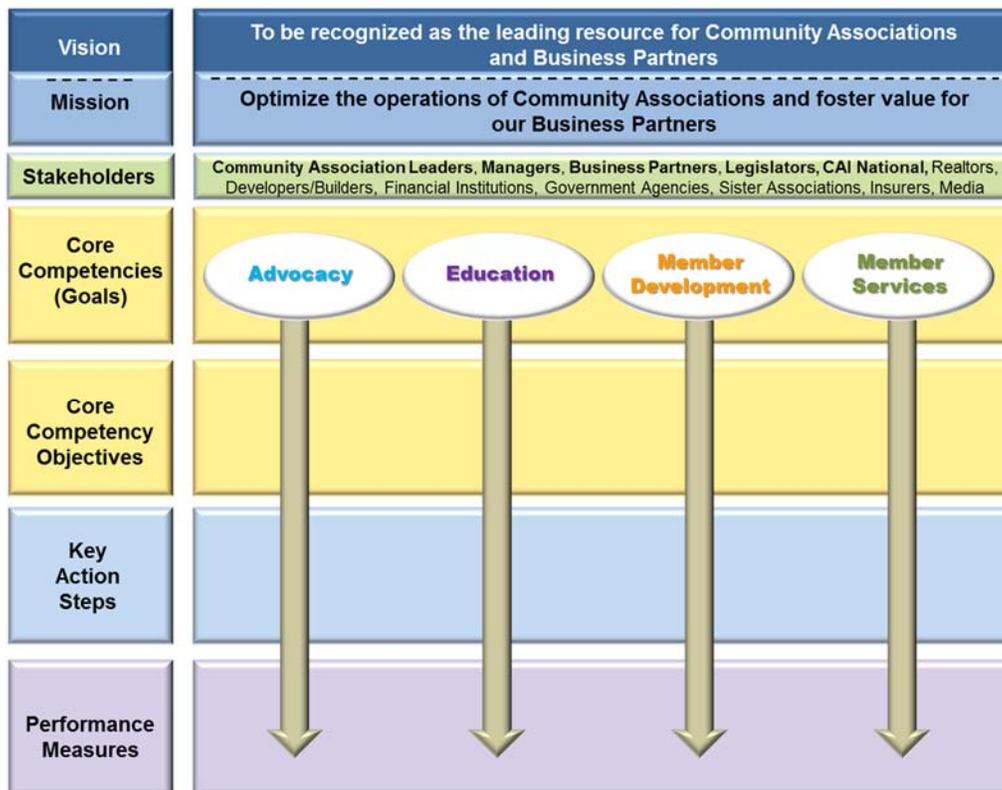
Central themes emerged from the Advance regarding how WMCCAI should go about its work on the strategic plan in the coming years. These were:

- Introduce *fresh approaches* to new and existing events and activities that are focused on and accessible by target groups;
- Be *proactive*, in both the short term and the long run; and
- Establish and practice *effective communication* among ourselves and with our stakeholders.

## WMCCAI’s Strategic Structure

The Framework below illustrates the format of WMCCAI’s Strategic Plan. The Vision and Mission Statements are overarching, the stakeholders are central, and our competencies represent what we do in four key arenas: Advocacy, Education, Member Development, and Member Services – all exercised within the Foundational competency of building and maintaining relationships.

Figure 2 – WMCCAI Strategic Overview – The Strategy Map





## Core Competencies & Objectives

Core Competencies are what WMCCAI does and must continue to do to succeed. They are the strategic goals and objectives for which the organization must identify key action items in order to accomplish the organization’s mission. Without these core competencies, WMCCAI would neither be viable nor a presence in the community associations’ world. Following are the goals, objectives, key action items, and performance measures established for each competency.

### Advocacy

The Advocacy Competency Goal is to establish and enhance/maintain relationships with legislators and government officials and to advocate on behalf of community associations.

Figure 3 – Advocacy Objectives, Key Action Steps and Performance Measures

<p><i>Local Objectives (2015-2017)</i></p> <ul style="list-style-type: none"><li>▪ Identify target audiences</li><li>▪ Identify key gatekeepers and decision makers</li><li>▪ Develop materials for key contacts (stakeholders)</li><li>▪ Establish a plan for personal relationships and “contact” plan/presence with 2-3 individuals within each county serving our membership</li><li>▪ Empower (recruit and develop) homeowner advocates (constituents) (6 in each jurisdiction)</li></ul>
<p><i>State Objectives (2015-2017)</i></p> <ul style="list-style-type: none"><li>▪ ID target audiences, key players (delegation for each county at state level)</li><li>▪ Establish relationships with one representative from each group</li><li>▪ ID and distribute relevant materials</li><li>▪ Actively draft at least 2 bills each year that benefit common interest communities</li></ul>
<p><i>Key Action Steps</i></p> <ul style="list-style-type: none"><li>▪ Review and Examine Committee Structure and Membership</li></ul>
<p><i>Performance Measures</i></p> <ul style="list-style-type: none"><li>▪ Legislators take the call from WMCCAI when contacted and are aware of what we do</li><li>▪ Favorable bills are advanced and unfavorable bills are defeated or revised</li><li>▪ Legislators attend WMCCAI events and/or participate</li><li>▪ WMCCAI is regarded as a Legislative Action Committee (LAC) resource</li></ul>



## Education

The Education Competency Goal is to provide a World-Class Education Curriculum for Stakeholders.

Figure 4 – Education Objectives, Key Action Steps and Performance Measures

<p><i>Objectives (2015-2017)</i></p> <ul style="list-style-type: none"><li>▪ Standardize/establish criteria for education programs<ul style="list-style-type: none"><li>▪ Curriculum /topics (Baseline or Core vs Electives)</li><li>▪ Faculty (vet, train, evaluate)</li><li>▪ Materials</li><li>▪ # Offerings</li><li>▪ Venue</li><li>▪ Amenities</li><li>▪ Advertising/attendance</li></ul></li><li>▪ Identify Short-term structure and resources</li></ul>
<p><i>Key Action Steps</i></p> <ul style="list-style-type: none"><li>▪ Identify responsibilities, and develop/recruit education coordinator position</li><li>▪ Reinforce the work of the Education Committee with the staff education coordinator</li></ul>
<p><i>Performance Measures</i></p> <ul style="list-style-type: none"><li>▪ Develop metrics for the following general success measures:<ul style="list-style-type: none"><li>▪ Increased credibility as a resource on community associations</li><li>▪ More attendees/readership</li><li>▪ More partnerships with governments and related groups</li><li>▪ Education learned is applied in practice</li></ul></li></ul>



## Member Development

The Member Development Competency Goal is to boost membership and participation through enhanced outreach.

Figure 5 – Member Development Objectives, Key Action Steps and Performance Measures

<p><i>Objectives (2015-2017)</i></p> <ul style="list-style-type: none"><li>▪ Establish baseline populations and membership numbers</li><li>▪ Develop annual Growth Targets for:<ul style="list-style-type: none"><li>▪ Homeowner memberships</li><li>▪ Manager memberships</li><li>▪ Business Partners</li></ul></li><li>▪ Evaluate Quorum advertising</li><li>▪ Sell out exhibit booths by December 31</li><li>▪ Increase booth participation at the annual Conference and Expo by 10 booths (2016)</li><li>▪ Increase annual education participation to 2000 registrants</li><li>▪ Analyze subject matter and timing</li></ul>
<p><i>Key Action Steps</i></p> <ul style="list-style-type: none"><li>▪ Conduct regular updates on net membership numbers for each member group</li><li>▪ Review and examine membership committees and goals</li></ul>
<p><i>Performance Measures</i></p> <ul style="list-style-type: none"><li>▪ Net membership growth: Evaluate 4000 by 40</li><li>▪ All scheduled educational or networking program meet enrollment quotas</li><li>▪ Events held are successful with regard to attendance and content offered</li></ul>



## Member Services

The Member Services Competency Goal is to maximize value provided to our current members, including Business Partners (Events, Conferences, Materials, etc.)

Figure 6 – Member Services Objectives, Key Action Steps and Performance Measures

<p><i>Objectives (2015-2017)</i></p> <ul style="list-style-type: none"><li>▪ Evaluate all events (2015) by the following areas:<ul style="list-style-type: none"><li>▪ Format</li><li>▪ Yes/no for retention of event</li><li>▪ Timing</li><li>▪ Attendance distribution/target audience</li><li>▪ Advertising</li></ul></li><li>▪ Set event objectives, establish success criteria (2016)<ul style="list-style-type: none"><li>▪ Maximize interaction</li><li>▪ Keep costs low</li><li>▪ Maximize revenue</li><li>▪ Recognition/awards (in person only)</li><li>▪ Determine audience</li></ul></li><li>▪ For potential events, evaluate communication strategies<ul style="list-style-type: none"><li>▪ Social media</li><li>▪ Website</li><li>▪ Quorum</li><li>▪ Repository</li><li>▪ Creation of an interactive platform</li></ul></li></ul>
<p><i>Key Action Steps</i></p> <ul style="list-style-type: none"><li>▪ Board will develop a structure, form a subcommittee, and identify deadlines for an event evaluation matrix.</li></ul>
<p><i>Performance Measures</i></p> <ul style="list-style-type: none"><li>▪ Develop Metrics for:<ul style="list-style-type: none"><li>▪ Increased involvement in the committee</li><li>▪ Increase in renewal rates</li></ul></li></ul>



- Increased participation by all member categories
- Increased investment in chapter by business partners

## **Taking the Next Steps**

The process used for the development of this strategic plan examined the desired end state, verified that the final strategy will move the organization towards that vision, and build on any existing strategic planning efforts (as appropriate). Moving forward, there are several steps that need to be taken to operationalize this plan. Each step will require input from the Board, our Executive Director and the staff.

### **Performance Measurement System**

Measurement drives both organizational and individual behavior. We will now work to develop a set of measures and targets for each component of the strategy map as the basis for the performance measurement system. Well-developed metrics will allow us to frame expectations internally (with personnel) and externally (with stakeholders), identify key success factors, identify gaps between performance and the expectation, and demonstrate return on investment by identifying efforts that yield positive results.

### **Comprehensive Set of Prioritized Initiatives**

We will continue to craft and prioritize a set of initiatives linked to each component of the strategy map. An initiative is an action plan to bring performance in a specific area up to desired level or to set new processes in place that are critical to mission accomplishment. This set of initiatives will map out the road ahead, defining the problem and a proposed solution. Measurement of the goals and objectives tells us what is not working and the initiative process requires we make a plan to fix the problem.

### **Communications Strategy**

We have developed a strategic communications plan that outlines steps to appropriately engage internal and external stakeholders, in support of the strategy map. Part of this plan will include efforts to build a strong culture of communication and collaboration within our organization, as this will support more effective external communication in future years. We must ensure our efforts stay focused on the right messages and goals, measuring the reach of our content to gauge the effectiveness of our efforts.



## Appendix A – The Advance

### Critical Findings from the Advance:

#### Forces and Trends

These stimulated much thinking and discussion and formed the foundation for the draft Vision and Mission developed later.

#### Inventory II: Forces (F) and Trends (T)

F	Unrealistic expectations—converging boundaries
F	Media perceptions—negative in CAs
F	Judicial perceptions
F	Legislative perceptions
F	FMA competitors for events and education
F	Demand for immediate communications (social media)
F/T	Requirements to develop in PUDs/CAs—growth
F/T	CA industry regulation—CCAC, CACB, etc.
T	Who can afford or qualify to buy a home
T	Greater threat of litigation—probably from recent cases
T	Paperless vs. Paper
F	Generational differences
F	Geography—size of chapter: VA, DC, MD
F	Where does the money come from?
T	Email overload
T	Demographics—economic, cultural
F	What is a meeting?
T	Less free time
F	CAI National Policies
T	Apathy
T	Agency infrastructure



## Stakeholders

This activity generated a substantial list of individuals and entities that we touch or touch us.

### Inventory IV: Stakeholders

- Business Partners
- CAVL
- MGR
- Homeowners—Prospective and current
- Developers/Builders
- Legislators/Judges
- Financial Institutions
- Government Agencies
- CAI National (Mother Ship)
- Sister Associations (PMA, BOMA)
- Realtors
- Insurers
- Media

## WMCCAI Values

These were generated for Products and Services, External Relationships, and Internal Relationships and also added to the formation of draft Vision and Mission Statements.

Products and Services				
Quality	Focused	Innovative	Inclusive	Credibility
<ul style="list-style-type: none"> <li>▪ Quality</li> <li>▪ Leading</li> <li>▪ Relevant +</li> <li>▪ Effective</li> <li>▪ Valuable</li> </ul>	<ul style="list-style-type: none"> <li>▪ Community Member focused</li> <li>▪ Needs focused</li> <li>▪ Essential</li> <li>▪ Desired</li> <li>▪ Timely +</li> <li>▪ Accessible +</li> </ul>	<ul style="list-style-type: none"> <li>▪ Innovative</li> <li>▪ Unique</li> <li>▪ Cutting edge</li> </ul>	<ul style="list-style-type: none"> <li>▪ Diverse</li> <li>▪ Inclusive</li> </ul>	<ul style="list-style-type: none"> <li>▪ Expertise</li> <li>▪ Certified recognition</li> <li>▪ We are the “go to”</li> </ul>



<b>Internal Relationships</b>				
<b>Empathy</b>	<b>Support</b>	<b>Team Work</b>	<b>Community</b>	<b>Invested</b>
<ul style="list-style-type: none"> <li>▪ Energizing</li> <li>▪ Growth</li> <li>▪ Open-minded</li> <li>▪ Mentoring</li> </ul>	<ul style="list-style-type: none"> <li>▪ Supportive</li> <li>▪ Cooperative Support</li> <li>▪ Response</li> </ul>	<ul style="list-style-type: none"> <li>▪ Collaborative ++</li> <li>▪ Cooperative +</li> <li>▪ Combined energy</li> <li>▪ Cohesive</li> <li>▪ Homogeneous</li> <li>▪ Team work</li> </ul>	<ul style="list-style-type: none"> <li>▪ Responsive</li> <li>▪ Members</li> </ul>	<ul style="list-style-type: none"> <li>▪ Hardworking</li> <li>▪ Measurable</li> <li>▪ Available</li> <li>▪ Motivated</li> </ul>

<b>External Relationships</b>			
<b>Cooperative</b>	<b>Audience-Focused</b>	<b>Reputable</b>	<b>Fulfilling</b>
<ul style="list-style-type: none"> <li>▪ Cooperative</li> <li>▪ Positive +</li> <li>▪ Useful</li> <li>▪ Collaborative</li> </ul>	<ul style="list-style-type: none"> <li>▪ Community Member focused</li> <li>▪ Targeted</li> <li>▪ Beneficial for members</li> <li>▪ Mutually beneficial +</li> <li>▪ Valuable +</li> </ul>	<ul style="list-style-type: none"> <li>▪ Respectful++</li> <li>▪ Mutual respect</li> <li>▪ Information Source</li> <li>▪ The Standard</li> <li>▪ Trusted/Influential</li> </ul>	<ul style="list-style-type: none"> <li>▪ Engaging</li> <li>▪ Involved</li> <li>▪ Trust</li> <li>▪ Far reaching</li> </ul>

### **Vision and Mission Statement Candidates**

These were drafted at the Advance with everyone providing input in a round robin approach. Subsequently refined by the Strategic Planning Committee (See below), these statements and the Bold Goals that follow, served as the foundation stones for the more refined plan that has emerged.

*Vision Statement Candidates:*

- To be recognized as the leading provider of information, education, and advocacy for community associations/common interest communities. (through a strong network)
  - (Latter phrase not widely liked)



- WMCCAI is the advocate for vibrant, active, well-managed and sustainable community associations (and the supporting industry).

*Mission Statement Candidates:*

- (From current MS) To advocate on behalf of community associations and support their volunteer leaders and professionals.
- (New, preferred by attendees) To promote the operation, management and governance of community associations through education, communication, and advocacy.

**Note: Several questions regarding whether we really advocate.**

### **Bold Goal Areas**

These became a jumping off point for the Strategic Planning Committee and additionally validated the sense that it was time for WMCCAI to move forward with vigor. These goals were eventually represented in more targeted goals for each competency area.

### **Products and Services**

- The premier source for advocacy, education/information for common interest communities.
- The recognized industry leader in the delivery of innovative programs and services for common-interest communities.

### **Internal Relationships**

- We will invest in, support, and empower our volunteers and staff to realize our vision.
- Create a culture that fosters and encourages innovation, collaboration, ownership and growth.

### **External Relationships**

- Create positive perceptions of community associations, industry, and other stakeholders
- Educate and foster collaborative relationships with legislators / all stakeholders /others related to the CA industry.
- Engage all stakeholders in a cooperative effort to fulfill our mission.