



Washington Metropolitan Chapter Community Associations Institute

2015-2017 Strategic Plan

renewed for 2017-2202



Prepared In Conjunction With



Perpetual Movement to Results

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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

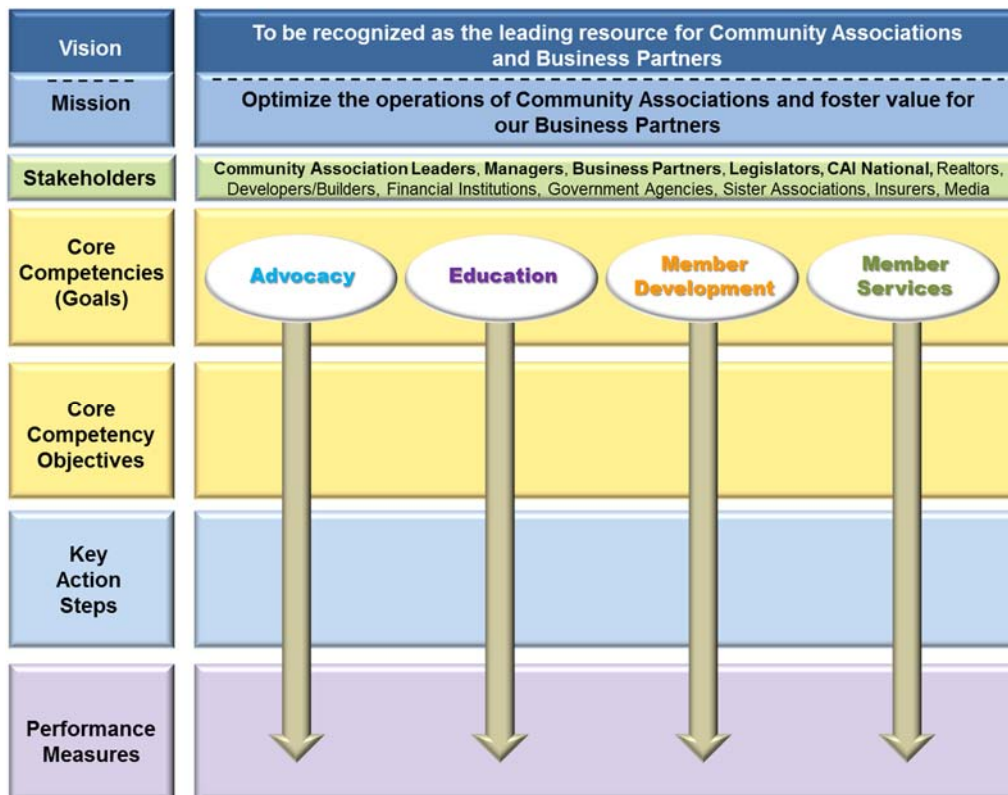
Central themes emerged from the Advance regarding how WMCCAI should go about its work on the strategic plan in the coming years. These were:

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



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

Objectives (2015-2017)

- Standardize/establish criteria for education programs
 - Curriculum /topics (Baseline or Core vs Electives)
 - Faculty (vet, train, evaluate)
 - Materials
 - # Offerings
 - Venue
 - Amenities
 - Advertising/attendance
- Identify Short-term structure and resources

Key Action Steps

- Identify responsibilities, and develop/recruit education coordinator position
- Reinforce the work of the Education Committee with the staff education coordinator

Performance Measures

- Develop metrics for the following general success measures:
 - Increased credibility as a resource on community associations
 - More attendees/readership
 - More partnerships with governments and related groups
 - Education learned is applied in practice



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



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

Objectives (2015-2017)

- Evaluate all events (2015) by the following areas:
 - Format
 - Yes/no for retention of event
 - Timing
 - Attendance distribution/target audience
 - Advertising
- Set event objectives, establish success criteria (2016)
 - Maximize interaction
 - Keep costs low
 - Maximize revenue
 - Recognition/awards (in person only)
 - Determine audience
- For potential events, evaluate communication strategies
 - Social media
 - Website
 - Quorum
 - Repository
 - Creation of an interactive platform

Key Action Steps

- Board will develop a structure, form a subcommittee, and identify deadlines for an event evaluation matrix.

Performance Measures

- Develop Metrics for:
 - Increased involvement in the committee
 - Increase in renewal rates



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



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

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

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.)



Appendix B – Communications Plan Guidelines

Purpose

The goal of the WMCCAI Strategic Planning Communication Plan is to promote effective communication in order to engage WMCCAI in a comprehensive, informed, organic Strategic Plan. To this end, the Plan outlines the strategy for internal and external communication and guidelines, associated methods, and tools that are designed to create interest, participation, and excitement in this process. It is expected that the Communications Committee will populate and update this plan.

Objectives

This Communication Plan provides both a basic framework and guidelines to convey information and generate interest and excitement related to the WMCCAI Strategic Planning Process in a proactive, structured and timely manner. The objectives of the Communication Plan are to:

- Provide awareness of the purpose and value of the Strategic Plan and its intended actions.
- Generate excitement, participation and commitment to the process.
- Disseminate timely and relevant information about the plan.

This Communication Plan will be considered a living document to be updated as required to record information changes and evolving requirements.

Communication Strategy

The fundamental communication strategy is to proactively emphasize the primary purpose and value of the WMCCAI Strategic Plan and convey their innovative strategic solutions.

Good communication is essential to any organization. It is clear and honest, and designed to maximize the impact of messages. Without good communication, the message becomes muddled, reaches the wrong people, and fails to achieve objectives. This strategy is intended to facilitate effective communication with internal and external stakeholders and improve communication across the organization. The following sections outline our communication strategy in the broadest form. *A Communications Subteam will populate this plan.*

Internal Communication between WMCCAI and the Board

Possibilities: Briefings; Meetings, Other communiques

Table 1 below provides a sample of a communication matrix.

Table 1: Internal Communication Matrix.

Communication	Messenger	Audience	Timing/ Trigger	Mechanism/Tool
Internal	Board Chair or Members	Staff, Executive	TBD	Telephone, email, face-to-face



		Director		

External Communication for WMCCAI

External Communication includes communication to external organizations, agencies, and Services outside of WMCCAI.

External Communication Flow. **Communication and coordination with external organizations are paramount to increase organizational advocacy, integration and collaboration, delineate roles and responsibilities, and facilitate the progress of the strategic plan. All external communication should be routed through, or confirmed by the Board Chair, the Executive Director, Communications Committee and others as determined by the Board.**

Table 2 below provides the External Communication Matrix that outlines the basic set of communication activities that have been identified. It is anticipated that ad hoc communications in the form of meetings, e-mail, and presentations will take place between all stakeholders. This should be populated with one form for each stakeholder.

Table 2: External Communication Matrix.

Communication	Messenger	Audience	Message	Timing/ Trigger	Mechanism/Tool
Goal Area	Executive Director, Board Chair, Other	Stakeholder Name		TBD	
Objective					

Strategic Plan Communication and Publicity

WMCCAI maintains numerous relationships with internal and external audiences that require we speak with one voice and deliver in a coordinated image in all forms of communication. It is imperative that WMCCAI Strategic Planning Team’s communications be focused and uniformly consistent. The following provides various



methods in which we communicate publicly. Additionally, the following materials provide general guidelines and tools to improve communication skills and effectiveness.

Branding

One of the ways the WMCCAI Strategic Planning Team promotes speaking with one voice is through the use of branding. For the strategic planning process teams, it is the Organizational Logo which is on the front cover of this plan and on various display items at conferences and other events.

Strategic Plan Organizational Briefing

A brief should be developed for use as both an internal and external communication tool. The brief provides WMCCAI's Strategic Plan Vision, Mission, organizational structure, products and services, tools and resources, and current and future initiatives. The brief may be tailored to the audience as appropriate.

WMCCAI Strategic Planning Section on the WMCCAI Website

The WMCCAI Website provides a public facing website for general command information to include areas for Professional Staff, Board, and Other. A staff member should be designated to maintain this site.

Print Materials

WMCCAI has various informational print materials that provide a method to communicate both internally and externally to stakeholders. These materials communicate an overview of the mission, vision, products, services, points of contact (POCs), initiatives and accomplishments. They need to be reviewed regularly for consistency with current Vision, Mission, Goals, Objectives, Success Measures and Action Steps.

Public Communications

In addition to all external communication being routed through, or confirmed by, the Executive Director or Board Chair to ensure that the messages and information are correct, current, and cohesive. Briefs must be approved by the Executive Director and reviewed by The Communications Committee prior to external presentation and distribution.

It is important for WMCCAI Strategic Planning Team to coordinate with The Communications Committee regarding messaging and to ensure the team is following communications policies and procedures.

Communication Guidelines

Plan for Success

Successful communication is planned. The key to success is for the sender to control the elements of communication whenever and however possible. Planned communication starts with an objective. If you know what you are trying to accomplish, you can exercise more control and achieve more success. Whatever the objective, a communications strategy planning session should be the first step you take before deciding how best to communicate.



Understand your Audience

It is critical to know your audience before you communicate. You should establish a positive relationship and identify what the audience needs to know. Be aware of perceptions, and be prepared to address concerns. The receiver is the most important element in communication—if the receiver misunderstands or fails to receive the message, communication has not occurred.

Usually some fact finding or brainstorming may be required to better understand your audience's needs and expectations. Think beyond yourself—what matters to you may not matter to the audience. Ask yourself what impact your message will have on the audience. The more direct the impact is to the audience, the more they will have a need for detailed information. Ask:

- What concerns and questions will it generate?
- What preconceptions should be addressed?
- What false preconceptions should be corrected?
- What assurances would your audience want?
- How can you motivate the audience?
- How can you get buy-in from the audience?

Develop and Tailor Your Message

The message should allow you to meet your objective with your target audience. Think about what needs to happen to reach your objective. Identify the gap between what your audience knows or believes and where you want them to be. Then turn that gap into information, motivation, and action. Tailor the message to the audience by using these guidelines:

- *Speak the language the audience speaks.*
- Find the common ground you share with the audience.
- Inform by speaking plainly and truthfully.
- Motivate by fitting the outcome you desire to the needs of the audience.

Use the Right Tools for the Job

It is essential to know what communication tools (mechanisms/channels) you have at your disposal, and what other tools you may need to establish to reach the right audience in the best way.

Inventory your tools and choose the best one for the requirement. One important element in knowing your audience is being aware of what they read, what they listen to, and the sources they respect and trust. Choose an existing newsletter that the receiver reads regularly. Exhibit at an event your audience attends. Speak through a trusted spokesperson or organization. If your message is detailed, you may want to use a print tool



such as a brochure or memo. The audience can read and re-read, and then refer back to print messages—allowing them time to understand and use the tool as a resource. If your objective is to motivate, a picture may be worth a thousand words. Sometimes you will need a variety of tools to make the point.

Email: The advent of email has had a deleterious and beneficial effect on the way we communicate. Emails should not be treated as a casual conversation. What you say is one thing but what you write can have serious repercussions. Consider what you write, especially the tone and approach you take. Your emails represent the team, so the use of proper grammar is important.

- Turn your spelling and grammar check on.
- Re-read your email before you hit the send button.
- Always include your name, phone number, Job Title, sub-organization name, and WMCCAI at the bottom of your email (preferably in that order).
- Never hide your name in the “From” line—accountability is essential.

Social Media: Remember and abide by commonly accepted practices for using social media.

Listening is important. Plan for and seek some type of feedback from your audience. Feedback helps us recognize when the audience is confused, agitated, overloaded with information, etc. If we pay attention and remain flexible, we can quickly adjust the key messages, communication methods, etc.

Feedback is essential to identifying needs and measuring success. Feedback and listening go hand-in-hand when communication occurs one-on-one. Practice active listening by following these guidelines:

- *Pay Attention:* Show that you are listening; Provide feedback; Defer judgment
- *Respond Appropriately:* Focus your attention; Avoid distractions
- *Set aside your own opinions:* Be involved; Wait

Feedback is much more difficult when communication is implemented through print, electronic, or audiovisual tools. In these cases, we must rely on comprehensive audience analysis to anticipate needs, and it becomes critical to build in a feedback method or tool into your plan. This could be the only way to know if you have met the audience’s needs and your objective.

Communicating with Each Other

Good communication begins within our organization. Achieving success as an organization relies in part on communication.

Share Information. Our organization needs to encourage a culture of information sharing. If information is power, then we need to get in the habit of sharing it with each other to empower our workforce. Keys to sharing information are:



- ***Begin with the BLUF:*** Here are three simple things to remember: What do you know? Who needs to know it? Have you told them?
- Share “corporate knowledge.” You have to ***give*** information if you ever expect to ***receive*** information. People are much more likely to pass info to you if you occasionally pass info to them! In this case - it is truly better to give ***AND*** receive!
- Discourage withholding information. Do not sit on information that would benefit somebody else.
- Evaluate information received to determine who also may benefit and share the information with them.
- Communicate information quickly and systematically rather than only to selected individuals
- Avoid the “trickle down” chain of command method to communicate information.
- Communicate with all levels of the organization at the same time whenever possible. Share with the same information.
- Communicate the reasons behind decisions.
- ***Read*** any attachments you send out before you send them.

Open the Door. Create a climate where everyone’s opinion is sought and valued—and where stakeholders have the opportunity to raise concerns and to contribute to success.

Count our Meetings, Make Our Meetings Count. Meetings often consume too much time, especially if they are unproductive. But meetings can and should play an important role in communication. Time spent in meetings can be reduced by preparing and adhering to agendas to keep meetings productive.

Be a WMCCAI Strategic Plan Spokesperson. There are many opportunities to tell our story—both officially and unofficially.

Say what you mean. What’s in a word? It depends on the word and how you use it. For the purposes of this document and other communications, please keep in mind the following guidelines, especially when writing contracts and other official documents:

- “Shall” indicates the application of a procedure is mandatory.
- “Should” indicates the application of a procedure is recommended.
- “May” and “need not” indicates the application of a procedure is option.
- “Will” indicates future time. It never indicates any degree of requirement for application of a procedure.

Whenever you are asked to represent WMCCAI in an official capacity you are serving as a spokesperson. It is easy to be coerced into speaking on issues outside your area of expertise or to be persuaded into expressing opinions that may be contrary to official policies. Instead, refer people to someone in the organization, or tell them you’ll get back to them with an answer.



Tool	Description	Audience	Message Format	Lead Time	Feedback