

**COAST GUARD AUXILIARY ASSOCIATION, INC.
(CGAuxA)**



**STRATEGIC
BUSINESS & MARKETING PLAN**

2004 - 2006

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EXECUTIVE SUMMARY

VISION

The Coast Guard Auxiliary Association, Inc., strengthening its fiscal commitment to the U. S. Coast Guard Auxiliary and its members through innovative financial resources to meet all present and future financial needs.

MISSION

The overarching mission of the Coast Guard Auxiliary Association is to provide for the fiscal health of the U.S. Coast Guard Auxiliary. We will pursue creative long and short term policies to generate the income required to sustain all present and future program needs of the U.S. Coast Guard Auxiliary, by developing diverse income-producing sources and enhancing fundraising initiatives to make the Association a self-sustaining dynamic organization.

GENERAL PLAN

This Strategic Business & Marketing Plan seeks to create a long-range plan for the financial growth and expansion of the various businesses operating within the CGAuxA, as well as an entry into selected new businesses. It will define the CGAuxA structure, goals, and methods to meet the demands put upon the U. S. Coast Guard Auxiliary and the Association by the increasing capital requirements. This funding need is being generated by the normally increasing number of traditional missions and administrative costs associated with operating the Auxiliary. In addition, there will be major funding needs in support of the Maritime Homeland Security program (MHLS), such as Operations Patriot Readiness III, Waterway Watch program, etc.

The plan will look at the present five CGAuxA businesses:

- Educational Products
- Boating Courses
- Boating Products
- Fundraising
- Dues

And at the five general markets for the products generated by these businesses:

- Auxiliary Members
- Boaters
- Course Providers
- Re-Sellers
- Government

Sections of the plan will address the organization of the CGAuxA from the National organization through to the District and Flotilla distribution network. It will be important to assure that the organizational structure truly supports the purpose of the CGAuxA.

In addition, the plan will suggest that a business advisory group be formed. To be named the Executive Board of Trustees, the group will provide advice on the daily and long term business operations of the CGAuxA.

The American marketplace for marine products and services is huge. The CGAuxA needs to

- look at the entire marketplace,
- decide what products and services it can bring to the market/s,
- design and develop modern, efficient, and timely products,
- create an efficient production and distribution system, and
- move aggressively to change the present business into a dynamic, forward thinking and acting organization.

SCOPE

This strategic plan looks at the CGAuxA as a small business with 1) a headquarters (AuxCen) and 2) a distribution system (presently, members) selling products and services through individually managed Districts and Flotillas. Little market research has been done; product development and acquisition is slow; and the business/marketing management, while adequate in the past, is in need of progressive modernization if CGAuxA is to grow to the level and at the pace necessary for future success. For its work force, the CGAuxA depends on individuals within various Auxiliary departments whose attention and work focus is conflicted between traditional Auxiliary functions and marketing work needed to grow the CGAuxA support capabilities.

The scope of this plan will attempt to

- change the organization in such a way as to increase productivity and income from our present five business without undue dislocation to either the Auxiliary or CGAuxA;
- add new businesses, through start-ups or alliances;
- develop professional staff at all levels; and
- aggressively expand the name and mark of the Auxiliary to be a ‘tiger’ in the marketplace.

I. ENVIRONMENT

(This section strives to encapsulate the past and present positions of the CGAuxA.)

The Coast Guard Auxiliary Association was formed to provide capital and income for internal and external functions that are not financially supported by the Coast Guard. This includes the day-to-day expense of Association and Auxiliary operations, as well as much of the RBS activity.

The Association is a 501(c)(3) non-profit organization and operates as a small business in support of the Auxiliary. The membership of the Association mirrors Auxiliary membership, with the Board of Directors being composed of all District Commodores and the executive board members (essentially the same as NEXCOM).

The Coast Guard has minimal interest in the day-to-day operation of the Association; its oversight is limited to the legal issues pertaining to the relationship of the Auxiliary to the Association.

Prior to 9-11-2001 the Association, while mainly successful in its role of producing income, was under severe market pressures to take action to prevent decreasing, or static, levels of income. These market-driven pressures were exacerbated by the events of 9-11 in that Auxiliary personnel who, as members of the Association, do the work that produces the income, were hard at work in the surge requirements necessary to support the Coast Guard. Operation Patriot Readiness III will continue to focus attention on MHLS issues.

Market pressures came from ever increasing state initiatives to provide boater safety education directly to students. States also use grants and tax monies to provide educational material, with delivery being essentially free to the student.

The advent and continuation of mandatory state education requirements have also had an impact on CGAuxA income and results. There is both an opportunity and a limitation with regard to this market change. The opportunity is self-evident – thousands of new students who MUST get educated if they want to boat. The limitation is lack of capacity. That is, the current delivery method of choice and experience, namely classroom, teacher-delivered courses, has not been able to keep up with the increase in students.

This numerical increase in potential students also has had the effect of bringing more competition into the market. As has been mentioned, this is reflected in the greater intrusion of state-delivered boating education. There has also been an increasing competitive push to use nonclassroom-delivered education.

Technology has made it possible for boaters to get the necessary basic (often mandatory) education on-line or via home study, take the state test, be issued a completion document - all without any personal interaction with a teacher or organization. *America's Boating Course* addresses this need. However, neither partner (CGAuxA or USPS) has yet learned how to properly utilize this product.

So, where does the CGAuxA stand today? The financial capital required to support today's expense demands is falling far short of expectations and needs. The market for CGAuxA products and services is huge and expanding. Competition is increasing. It is these situations and trends that push for a new strategic plan for the CGAuxA.

II. CGAuxA BUSINESSES

Looking at present activities, it is possible to identify five separate businesses that produce most of the CGAuxA income. Each has its own characteristics and must be managed in such a way as to maximize strong points and minimize the weaker ones.

Each business needs its own strategic and tactical business plan as well as a functioning organization that supports that particular business. For each business, financial information needs to be specific, accurate, and readily available for both planning and success measurement.

Likewise, each business needs to have its own business manager and support staff, with adequate authority and full accountability for that business. While there are some core functions (advertising, production, and warehousing) that are common to all businesses, there needs to be a “team”, headed by a business manager, for each of the five businesses.

The job of the team is to:

- Conduct market research
- Recommend products
- Submit a business/marketing plan to CGAuxA management, complete with financial information
- Execute the plans and report the results on a quarterly basis

As the general market research efforts of each business are developed, it is likely, indeed probable and desired, that the marketplace will suggest other new businesses that CGAuxA should enter. The constant evaluation of current businesses and the aggressive search for new business must be a continuous process.

Following is a brief look at each of the present five businesses.

A. EDUCATIONAL PRODUCTS

The purpose of this business is to produce educational products for direct sale to the public and for use in Auxiliary courses. For the past few years, emphasis has been placed on modernizing, de-bundling, and re-formatting these products.

In addition, several new products have been added to the inventory. These have been added by acquiring the product from a vendor, creating it internally, or forming joint ventures.

2.1 Internal Sales

These products have been ‘sold’ to Flotillas through the District distribution system. While pricing to the ultimate consumer must be flexible and responsive to market forces, pricing to the retail level (Flotillas) needs to change so that pricing to Flotillas is universal throughout the Auxiliary. Without such a change, it will continue to be difficult to respond to competitive pressures on a national scale and to convince Flotillas that they are part of a national marketing effort where wholesale prices are fair and uniform.

In addition, the organization now demands that the creative and production facilities, in this case the Department of Education, are also responsible for sales and distribution. These are two separate functions requiring different experience and talents.

2.2 External Sales

It would appear that there is a major demand from the boating public for access to boating information (witness the increasing success and number of providers). The market share of CGAuxA is probably not more than .5%. Due to the limited distribution capacity of classroom courses, educational products need to be aggressively marketed directly, or through re-sellers, to the boating public.

2.3 Product Development

Product development has mostly been dictated by top management in response to inputs from members or hunches based on personal experience. While this can be a reliable source of market research, it just as often reflects the views of a small group of members with little reference to market demand. This needs to change, not by bypassing member input, but by verifying such input with in-depth market research.

Further, development or acquisition of new products needs to be timelier. A short development cycle will allow the CGAuxA to lead the market, better satisfying the market and its members.

2.4 Market Research

It is safe to say that market research in CGAuxA mostly comes from internal sources. While it may be advantageous to have a central market research facility (either created internally or outsourced), it is vital to commence that this effort be handled either centrally or within each business.

B. BOATING COURSES

This is a different business than product development and distribution. It has a market composed of boating students, in addition to Flotillas and members. Courses use products developed and manufactured by the Educational Products business. Often several products comprise a course. Thus, the two businesses, Education Products and Boating Courses, must work in harmony.

This business has the following individual sections.

2.5 Basic Courses

These courses have been the mainstay of Public Education for a long time. They are now subject to increasing competitive market pressures (mainly the states). CGAuxA needs to consider these alternatives:

- continuing on the present course (which is likely to see an already low market share further decrease);
- aggressively forging linkages with other organizations (such as USPS and the states); or
- electing to abandon the market of basic boating education.

Clearly, linkages seem the way to go in our pursuit of increased income. In any event, it is obvious that, while expansion of classroom courses should occur, alternative distribution channels also need to be developed. The boating public is overwhelmingly 'wired'. That is, computer literate. (The Coast Guard estimates that over 80% of boaters have computer access and the ability to use it.)

In addition, the modern American family is beset with demands on their time. Home study, using various media, must also be aggressively expanded.

2.6 Intermediate Courses

Market pressures directed at the basic courses, such as mandatory education, encourage or force boaters to undergo an educational experience. This basic education experience lends itself to the active creation and distribution of new intermediate courses and better exploitation of current ones as follow-on courses.

More such courses (often short and specifically directed to one subject) need to be developed for classroom delivery. Students attending these courses do so from a different perspective than most basic students. They come to class because they WANT to learn, not because they have to. In addition, it is this type of course that most Auxiliary instructors want to teach.

Alternate methods of distribution that foster home study is a market-delivery method almost devoid of competition. In-depth market research needs to be directed on this segment to ascertain just what the boating public wants, in both subject matter and delivery systems. Technology will play an important role in course design and delivery.

2.7 Advanced Courses

With the knowledge that the market for advanced courses is nowhere near the size of either basic or intermediate course markets, all that was said of intermediate courses holds true with advanced ones.

2.8 Traditional Delivery

Teacher-led, classroom-delivered courses, at all levels, need to be reinforced and expanded. The Maritime Homeland Security (MHLS) initiative provides the format to re-invigorate Flotillas and members to teach a large number of well-designed, short courses that combine boating safety education along with Homeland Security issues. These courses, many taught with the active assistance of Coast Guard personnel, need to be portable and otherwise easy to access. In other words, they must be offered when and where the students want them.

Pricing should be targeted to the particular student population being addressed. In addition, new methods of financing MHLS oriented courses need to be found. Such financial aid might come from government and/or corporate grants.

2.9 Non-Traditional Delivery

The Internet, commercial stores, road shows, and direct mail all offer ways to reach people who are not apt to attend formal, scheduled classes. In addition, small and large firms that are now teaching boating classes represent a distribution system for CGAuxA.

Almost all such course delivery systems need to be in support of home study. Once again, major research is required to capture exactly what the various student market segments want to learn and just how they want it delivered.

While these non-traditional delivery systems represent access to a huge market share, they are also expensive and represent major risk taking. In order to alleviate some of that risk, alliances, partnerships, and endorsements would seem to represent a viable avenue for CGAuxA.

C. BOATING PRODUCTS

These products run the entire gamut of what boaters purchase to support their boating activity or business. They offer the CGAuxA with an opportunity to be associated with, and market products produced by, existing businesses as well as forming product development and distribution channels for new products.

One of the major advantages to CGAuxA in such linkages is financial. Existing products require little or no further capital investment, and capital requirements for new product development, manufacture, and distribution can be shared.

2.10 Endorsements

A practically risk-free income stream can be realized by the endorsement of the products of others. The CGAuxA mark must become as important as the Underwriters mark or the Good Housekeeping Seal of Approval. Here again, the Auxiliary's role in MHLS will add greatly to stature and acceptance of our mark as an important product enhancement.

For our endorsement to become effective, the Auxiliary and CGAuxA must establish a widespread, positive image in the marketplace. There needs to be proof that our mark leads to further market share for those who use it as an endorsement. One way to do this would be to select those products (or businesses) we believe would benefit from the use of our mark, offer them the use of it at little or no cost for a test period, establish test parameters, and set out to build a reputation.

2.11 Flotillas as Sales Outlets

With 1,100 Flotillas and 37,000 members, it would appear that CGAuxA has an awesome sales potential - not only for sales of internally developed products, but as agents for the distribution of boating products from other vendors.

To realize the potential of CGAuxA as a market force, two events must occur. First, the membership must be convinced that the sale of boating products at the Flotilla level is a worthwhile and important function. Secondly, the income stream of these sales has to be sufficient enough to allow the Flotilla to perform many of its missions that are currently not funded or are under funded.

During the past several years, attempts have been made to enlist the membership in the sale of boating safety products to the public. While some success has been reached with the sale of educational material in conjunction with Public Education classes, it has become clear

that the membership has little interest or desire to actively sell boating products directly to the public.

Thus, while the market for boating product sales is huge and growing the Association should look at developing this market outside of Auxiliary member participation. To continue promoting sales through members at the Flotilla level will only serve as a distraction.

2.12 Internal Product Development

While there will probably be some areas where internal product development is necessary and productive, the overwhelming inventory of product should come from those currently available. Risk capital and developmental effort are better shared, or eliminated completely, than trying to self-fund for internal development.

Alliances and joint ventures would seem to be the preferred methods. Start a widely directed search for such products, augmented by individual contracts with the providers. This would result in a product inventory increase without undue risk capital and effort.

D. FUNDRAISING

The Fundraising business has already progressed past the strategic phase of planning. A specific strategic and tactical business plan has been developed and approved by the CGAuxA board and is in the process of becoming operational. A business manager has been appointed.

2.13 Present Plan Status

The mission statement of the Fundraising business is “To provide the financial resources required to support and enhance Auxiliary missions and authorized programs.” This statement fits quite well with the goal statement of this Strategic Business & Marketing Plan.

Two primary thrusts are envisioned. One is a permanent Endowment Fund and the other is an Annual Fund. Business plans, complete with goals, have been established and approved for action. A Fundraising Policy Manual has been created and serves as the major guidance tool for this business.

However, even with the well planned program, the results are minimal! Further attention and resources must be applied, with more emphasis on personal contacts in specifically targeted companies. Our efforts with two insurance companies, State Farm and Nationwide, have demonstrated that such contact development can work. Expand these two contacts and target the insurance industry as a whole.

Target marketing is the key and specific, tactical plans need to be developed, sooner rather than later!

E. DUES

2.14 Auxiliary Memberships

This business, the second largest in terms of revenue in the Auxiliary, has several ways to grow. First, it could, responsibly, raise the current dues. This move must be in tandem with a program to convince the membership of the value added of a dues increase. Secondly,

various member “classes” could be investigated. This might be a “pay for what you get/want” program. This could result in base dues, plus add-ons for higher qualifications or activities. Thirdly, starter dues for young members and/or free (or nearly free) trial memberships are other ideas.

In any event, conduct ongoing research into the practices of other, similar organizations and review the philosophical practice of having one dues structure for everyone.

2.15 Associate Memberships

Many individuals are in the membership market who, for a variety of reasons, are unwilling to join the Auxiliary as full time traditional Auxiliarists. However, they might welcome the opportunity to support the Auxiliary as Associate Members of CGAuxA. The Associate Membership Committee developed a plan and implemented it in 2004 by launching the CGAuxA Associate Membership program. The objective of this program is to facilitate financial and, potentially, other support to the Auxiliary and its programs by individuals who are not members of USCG Auxiliary. The financial support provided by Associate Members would be rewarded by various perks from the CGAuxA consistent with the level of the financial contribution. Should Associate Members subsequently wish to participate in Auxiliary activities, they could, if eligible, join the Auxiliary as active members.

Many citizens wanting to assist in combating terrorism could see the MHLS effort as their opportunity. In addition to potential financial help, these members could provide CGAuxA with specific talent in such areas as sales, marketing, law or research.

To date, this program has shown limited success, with only a dozen or so new members (and some of these were regular members who opted for Associate Membership). Thus, this program need to be reinvigorated by providing the management and resources necessary to assure success. Barring the necessary changes, this program will become, simply, another distraction.

III. MARKETS

In tandem with the five businesses, we will review the five broad markets for these businesses. As tactics in support of this strategic plan are developed, it is likely that evolving market segmentation will show us where to sell our products and services.

A. AUXILIARY MEMBERS

The 37,000 Auxiliary members represent a sizable internal market for CGAuxA products and services. To expand sales through this market requires classic internal promotion measures. These measures are well known in the business community and could easily be directed at the Auxiliary membership.

Of equal importance, is the ease of viewing, selecting, ordering, paying for, and getting delivery of the products. The present Internet concept of product management could be used in designing a system that mirrors what consumers already use.

The District outlet stores, while popular and reasonably efficient, should be looked at from a cost/benefit standpoint. Also, the question of differential District pricing of products to members does not readily lend itself to broadly based market promotion, competitive response, and fairness to the membership.

This market will respond well to a system that allows members to purchase boating supplies through CGAuxA rather than outside vendors. An aggressive approach to increasing product lines should harvest admirable results.

3.1 New Members

In relation to CGAuxA products and services, the perception of new members, in many cases, is established the first time the sales system is used. If the products are worthwhile, attractively displayed, easy to order and fairly priced, new members are likely to become satisfied, long-term customers. CGAuxA, including the District outlets, must see to it that the first experience is a good one.

Immediately upon joining the Auxiliary, new members should be guided as to what to purchase, and encouraged to do so. An almost-automatic system might be of value.

3.2 Established Members

Even more so than with new members, established members react positively to well-conceived and executed sales efforts within the Auxiliary family. The key with this group is to constantly remind and encourage members as to what is available in the store and how to get the items.

B. BOATERS

This huge (in the millions!) market is dominated by a number of large, boating-specific outlets (West Marine, Boater's World, etc.), thousands of independent boating outlets (marinas, locally owned boat stores, yacht clubs) and a large, rapidly growing Internet distribution system. It is a mature market with a steady growth rate. New distribution systems or new players, such as CGAuxA, will find the competition daunting and market entry slow and expensive.

This situation lends itself to alliances, joint ventures, and distribution contracts for CGAuxA to gain market success. As alluded to earlier in this plan, as CGAuxA earns a reputation as a reseller and endorser of products, so will these alliances become more valuable and contribute an excellent income stream.

The market is so large that market segmentation needs to be a prime consideration. Establish target markets prior to consideration of alliance partners.

3.3 Students

One such segment will surely be boating students, produced either from mandatory requirements or a thirst for knowledge. The Auxiliary is no novice here, and aggressive expansion of what is presently being done will have a positive effect on the bottom line.

Much of what needs to be done was addressed earlier in the section on Educational Products.

3.4 Other Boaters

In order to get a handle on this large market segment, a great deal of differentiation is required. The business manager for Boating Products must do considerable work prior to market entry.

C. COURSE PROVIDERS

Care must be exercised if this market is to be addressed. Some sensitivity to our own market activity is needed so as not to disenfranchise our members. Currently the market is composed of a number of independent providers (Chapman, mom & pops, etc.), BoatEd (which has a large market share), and the individual states.

At the present time, the large majority of these distribution sources provide learning only for beginning boaters. CGAuxA has made a new product entry into this market with ABC. Further product and administrative work needs to be done, as well as renewed marketing activity.

Research to ascertain whether or not there is a viable market for intermediate and advanced educational material is needed. Would states look favorably on our more advanced courses being promoted and delivered through the state approach now used for basic education?

D. RE-SELLERS

It would appear (to be confirmed with research) that herein lies an excellent market for CGAuxA. Products that we solely or jointly manufacture, acquire by alliance, or act as distributor for require distribution channels. Re-sellers, which are usually very market or product specific, have the expertise to become our end distributor.

Through its business managers, CGAuxA needs to create a larger product inventory and a sales strategy to methodically make sales calls on a selected list of re-sellers. The tactics to accomplish this should be well organized and ongoing. The sales effort that often gets the business is one that persists over a long time period.

Some research is also needed to help determine just what products or services re-sellers want and how they want them packaged. A targeted approach will probably lead to better results than one where we simply take a bundle of generic products to a large number of differently oriented re-sellers.

There are several re-seller groups that have a natural focus:

3.5 Marine Industry

A broad group to be segmented - such as marinas, manufacturers, boat stores, etc.

3.6 Book Distributors

Some are marine specific and others, such as Barnes & Noble, are generalists. Approaches specific to each are required.

3.7 Boat Builders

This is a larger market than is usually visualized. While there are a relatively small number of large volume builders, there are many small manufacturers. These are somewhat harder to identify but are usually much easier to contact and motivate to take action.

Another segment is the foreign builder who builds for the American market.

E. GOVERNMENT

At all levels, government is active in providing marine products and services to the end users. These users may be internal to the government (employees) or external (the public). We stand an excellent chance of being heard in this market due to the Auxiliary's quasi-military position with the Coast Guard. In any event, it is a multi-layered market that merits our attention. The market could be broadly segmented as follows:

3.8 Military

Coast Guard, Army, Navy, Marine Corp, Air Force, and the Corp of Engineers are the large elements. They can be further segmented. It requires a special kinship between the marketer and the market to make sales inroads. Individuals who are retired from these services could be target recruited to make the marketing approach. While high-ranking officers might turn out to be the answer, how much influence the marketer has with the purchasing/user side of the service may be more beneficial.

3.9 Law Enforcement

Federal, state, and local law enforcement agencies form a valuable re-seller resource. Each must be approached differently and, in the case of local law enforcement, a local, influential person may need to be involved in the sales process.

3.10 NASBLA

There is a real possibility of convincing states to sanction, or even directly deliver, our products to students. Both new and experienced boaters are prospects. The CGAuxA, with the Auxiliary and the Coast Guard, needs a coordinated plan to take to the states. The approach can be initiated through NASBLA, or directly with the individual states. The approach must show the states how it would benefit taxpaying boaters, while relieving states of some of the tasks and saving them money.

IV. ORGANIZATION

Without being organized in a way that supports critical and recognized marketing practices, this marketing plan will be more difficult to execute and, in many areas, impossible to accomplish.

CGAuxA was organized to raise money internally during a time when technology and the market place were far different than is the case today. At all levels, a business needs to know what is taking place. In addition, businesses, large and small, need to have the same policies and practices in place and operating in generally the same manner throughout the organization. (The cliché that "Every McDonalds is different, and every McDonalds is the same." applies here.) This is not currently the situation in the CGAuxA. There is a fracture between the CGAuxA at the

national level and the marketing/sales efforts in the Districts. This situation needs to be addressed, with minds open to change, as soon as possible.

Of vital importance is how to motivate and utilize the workforce in the Auxiliary to carry out a strategic marketing plan with all of its attendant tactics. Often in a market-oriented business, it is how the business is organized and structured that is of paramount importance to getting acceptance and cooperation at all levels. Members and leaders, at all levels, must feel ownership of the plan and have faith and confidence that the organization supports them.

Currently the same management that manages the Auxiliary manages the Association. Thought needs to be given to having a small dedicated group of individuals, with business backgrounds, serve as 'advisors' in the day-to-day and long term activities of the Association. This group might be named and function as an Executive Board of Trustees

V. TIMELINES

This strategic plan, once approved, needs to have the organizational changes and supporting tactics ready for implementation by 1Q 2005 or earlier, if possible. If an implementation team approach is taken, the team must include leadership at all levels and be constituted so that all, or certainly the overwhelming majority, of the various constituencies involved accept the finding and welcome any recommended changes.