

# **Magic Valley Builders Association November 2018**

**Mission Statement:**

**Vision Statement:**  
TBD

**Facilitated by:**

Anna Tilley  
Consultant, Advisory Services  
NAHB  
1201 15<sup>th</sup> St., NW  
Washington, DC 20005  
1 (800) 368-5242 x 8347  
Email: [atilly@nahb.org](mailto:atilly@nahb.org)

## GROW (MEMBERSHIP) SWOT ANALYSIS

STRENGTHS	AREAS OF IMPROVEMENT
<ul style="list-style-type: none"> <li>● <b>Competition</b></li> <li>● Parade &amp; golf tourney – continue for builder participation</li> <li>● Continue for builder</li> <li>● Year-end party</li> <li>● Fear of not being involved</li> <li>● Financial position</li> </ul>	<ul style="list-style-type: none"> <li>● Builder Participation</li> <li>● Subcontractor involvement</li> <li>● Members not educated on the benefits of their membership</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>● <b>More promotion for growth</b></li> <li>● Builder round table (PD)</li> <li>● Point system for engagement – maybe reduce parade fee?</li> <li>● Subcontractor value                             <ul style="list-style-type: none"> <li>○ Training, OSHA</li> </ul> </li> <li>● Additional relationship building events</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Down economy (interest rates, increased costs)</b></li> <li>● Lack of benefit knowledge                             <ul style="list-style-type: none"> <li>○ State &amp; National</li> </ul> </li> </ul>

## PROMOTE (COMMUNICATIONS / PUBLIC RELATIONS) SWOT ANALYSIS

STRENGTHS	AREAS OF IMPROVEMENT
<ul style="list-style-type: none"> <li>● <b>Parade of Homes</b></li> <li>● Scholarship</li> <li>● Visibility of logo</li> <li>● Newsletter</li> <li>● Year-end party</li> </ul>	<ul style="list-style-type: none"> <li>● <b>Promoting subs, suppliers &amp; associates</b></li> <li>● Community identity</li> <li>● Educating the community</li> <li>● Social media</li> <li>● Builders promotion</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>● <b>Additional Social Media</b></li> <li>● Promote the logo / swag</li> <li>● Focused social media</li> <li>● Shooting competition event (for charity)</li> <li>● Participation in community charity events (further exposure)                             <ul style="list-style-type: none"> <li>○ Sponsorships</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>● <b>Not being needed by the builders</b></li> <li>● Downturn in the economy</li> <li>● Lack of participating in promotions</li> </ul>

## SUPPORT (ADVOCACY, INDUSTRY ISSUES) SWOT ANALYSIS

STRENGTHS	AREAS OF IMPROVEMENT
<ul style="list-style-type: none"> <li>• <b>Legislative support – being informed</b></li> <li>• Parade of Homes</li> <li>• CSI Student Scholarship</li> <li>• Attending state meeting</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Only having one <i>primary</i> event that supports the industry</b></li> <li>• Not very active with legislative issues locally</li> <li>• Current advocacy efforts not unified / unfocused</li> <li>• Not promoting ourselves                             <ul style="list-style-type: none"> <li>○ Community, social media</li> </ul> </li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• <b>Having more events that support the industry beyond the parade – focus on subcontractors</b></li> <li>• <b>Contractor registry (directory)</b></li> <li>• Get membership educated &amp; involved on legislative issues</li> <li>• Code official round table – 2-4 times annually</li> <li>• Annual CSI combine / EXPO</li> <li>• Education for builders                             <ul style="list-style-type: none"> <li>○ OSHA, insurance, etc.</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• <b>Lose parade / attrition</b></li> <li>• <b>Restrictive codes / impact fees connection</b></li> <li>• Licensure state</li> <li>• Government tariffs – material costs</li> <li>• Lot costs</li> </ul>

## LEAD (GOVERNANCE / OPERATIONS) ANALYSIS

STRENGTHS	AREAS OF IMPROVEMENT
<ul style="list-style-type: none"> <li>• <b>Diverse board</b></li> <li>• Involved membership committee</li> <li>• E.O. (Sari) is <u>AWESOME!</u></li> <li>• Experienced board members</li> <li>• More involvement at state</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Updated bylaws that are easy to understand</b></li> <li>• Board Orientation</li> <li>• Not being an involved board member</li> <li>• Leadership training</li> <li>• Board attendance / GMM's</li> <li>• Meeting benefits / irrelevance, boring</li> <li>• Commit to &amp; follow by-laws</li> </ul>
OPPORTUNITIES	THREATS
<ul style="list-style-type: none"> <li>• <b>Leadership Training</b></li> <li>• New members coming</li> <li>• More builder focus on events</li> <li>• Take advantage of state meetings</li> <li>• Tapping into available resources</li> </ul>	<ul style="list-style-type: none"> <li>• <b>Time commitment</b></li> <li>• Board not recruiting</li> <li>• Need of being involved</li> <li>• Non committed board members – no investment</li> <li>• Not benefiting our board members</li> <li>• Recruiting focus – unclear</li> </ul>

# Magic Valley Builders Association Discussion Vision Exercise

Members were asked to select a Visual Explorer Card that they felt like represents their picture of an idea future for MVBA. Below are the responses from the group to be used as inspiration in crafting a final Vision Statement for the association:

- Continue to be a leader in the community.
- Gain new members & grow our association, while the older members guide us.
- Wishes: the American dream: affordable and achievable by everyone.
- Build upon a solid foundation. Keep expanding over the years on the foundation we have laid.
- A nice setting for a place to live
- Hard work that pays off. Basics not forgotten during innovation
- A group coming together working for a common goal to improve for the future.
- Focus on younger generations. Collegiate-wise. Different views from different aspect thoughts of what to be.

# Magic Valley Builders Association Strategic Direction

**Mission:** We represent the building industry and related businesses by striving to promote quality building practices, standards and ethics. Our goal is to benefit the community and the industry through involvement, education and promotion of economic growth.

**Vision: TBD** (*Sample: MVBA is a strong, united voice in the Magic Valley, where the american dream is affordable and achievable by all.*)

**Grow**

- Goal 1:** Achieve a total membership of 125 by 12/31/2019.
- Goal 2:** Maintain retention rate of 92% by 12/31/19.
- Goal 3:** Develop 1 additional revenue generation event each year.

**Promote**

- Goal 1:** Increase public recognition of MVBA mission.
- Goal 2:** Increase promotion of the association through social media and other outlets.

**Support**

- Goal 1:** Maintain current efforts and establish a succession plan for government affairs activities.
- Goal 2:** Increase member awareness of the impact of the association on local, state and national issues.
- Goal 3:** Increase MVBA contribution to workforce development initiatives.

**Lead**

- Goal 1:** Accomplish update of bylaws, policies and procedures by June 1, 2019.
- Goal 2:** Establish plan for board orientation and training / onboarding for the executive committee
- Goal 3:** Increase builder participation in leadership by 2 per year.

# GROW

Goal 1: Achieve a total membership of 125 by 12/31/2019 (Note: Goals will need to be updated for 2020 and 2021).					
STRATEGIES TO ACHIEVE OUR GOALS	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Sponsorship					Include membership(s) in sponsor packages to increase both.
Magazine advertisement opportunities					Discuss further: is this a member benefit or a way to attract new members?
Update prospect lists through members, NAHB and local lists					<a href="#">Spike Rolodex</a> , permits/registration lists, chamber, and <a href="#">non-members attending IBS</a> .
Offer member recruitment training					Host a <a href="#">Membership Back to Basics presentation by your NAHB Field Rep</a>
Incentivize new members to recruit new members					Host a competition with prizes for teams and/or individual recruiters. Make it fun!
Conduct a membership drive focused on a specific category of membership					See <a href="#">NAHB Membership Drive Resources</a>
Increase member participation in recruitment by making recruitment and retention fun.					See <a href="#">Spokane Battleship Game</a> .
Goal 2: Maintain retention rate of 92% by 12/31/19 (Note: Goals will need to be updated for 2020 and 2021).					
STRATEGIES TO ACHIEVE OUR GOALS	Year	Assigned to	Due Date	Status	Notes/Resources Needed
POH Vendor display					Explore additional ways to increase retention with POH Vendors.
New member recognition / retention events					Look through <a href="#">past AEA winners</a> for ideas and inspiration
Pay it forward pop-by's					Use a google doc to track outreach and visits to member's offices.
Member feature in newsletter – quarterly					See example from <a href="#">Southern Utah</a> that uses NAHB's newsletter <a href="#">template</a> .

<i>Host an orientation for new members to learn what they're looking for and to explain how to get the most of their membership</i>					See <a href="#">Tulsa HBA</a> and connect with Director of Membership <a href="#">Gabby Bridenbaugh</a> .
<i>Create a quick sheet on how to maximize your membership to give new members</i>					Create a checklist for new members. Use <a href="#">NAHB Customizable Checklist Template</a> .
<i>Create a communications plan for the first two years of membership (highest risk)</i>					Use NAHB <a href="#">Touch</a> and <a href="#">NPS</a> and align this with the new member checklist.
<i>Create smaller micro volunteer opportunities to get more members involved.</i>					See <a href="#">Mariner Management</a> presentations on volunteering, specifically micro-volunteering.

**Goal 3: Develop 1 additional revenue generation event each year.**

<b>STRATEGIES TO ACHIEVE OUR GOALS</b>	<b>Year</b>	<b>Assigned to</b>	<b>Due Date</b>	<b>Status</b>	<b>Notes/Resources Needed</b>
POH vendor display fee					See examples from other HBAs: <a href="#">St George</a> , <a href="#">Cincinnati</a> , and <a href="#">Baton Rouge</a> .
Fall event created (like golf, shooting, etc.)					See <a href="#">Clay Shoot</a> and <a href="#">Golf event</a> information sheets.
Explore other events like bowling and corn hole					Visit <a href="#">nahb.org/IdeaBank</a> and <a href="#">AEA Winners</a> for examples like the <a href="#">Cornhole Tournament</a> .
<i>Explore mixed sponsorship /membership model (event only and some annual options)</i>					See <a href="#">FABA Cornerstone Sponsorship</a> program and CSHBA's more complex <a href="#">Marketing Guide</a> .
<i>Identify opportunities to increase existing event revenue.</i>					See <a href="#">Non-dues revenue / sponsorship presentation</a> and <a href="#">5 ways to make extra money from your event</a> .

# PROMOTE

Goal 1: Increase public recognition of MVBA mission and use MVBA to find industry professionals.					
STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Drive consumers to MVBA as a resource for finding industry professionals					Encourage customers to call the HBA or visit the website for qualified industry referrals.
Participate in additional events in the community					Find charities to partner with at <a href="http://Charities.org">Charities.org</a>
Directory of qualified and bonded professionals <ul style="list-style-type: none"> <li>• Include links to license, bonding and legal</li> </ul>					See AEA winner Shenandoah Valley BA's new <a href="#">Website and Directory</a> .
Public access (Angie's list)					Include <a href="#">NAHB Home Maintenance Tips</a>
<i>Send out regular press releases for the association and its members</i>					See <a href="#">examples</a> at HBA of Greater Austin
Goal 2: Increase promotion of the association through social media and other outlets.					
STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Increase use of Facebook / LinkedIn					See NAHB's <a href="#">Social Media 101</a>
Parade presents (shirts with logos) / MVBA swag to public					See IABA's <a href="#">Alaska Built</a> Swag and Association's Now <a href="#">Article on the brand</a> .
Create hashtags for people to follow events					Contact <a href="#">Olympia Master Builders</a> about their Facebook and Instagram ad campaign
<i>Expand our connections with local media outlets</i>					Contact <a href="#">Liz Thompson</a> for custom local media list
<i>Rely on NAHB for timely economic impact data (local focus) and share with the association and other organizations (Chamber, etc.)</i>					See <a href="#">NAHB Housings Economic Impact</a>



# SUPPORT

Goal 1: Maintain current efforts and establish a succession plan for government affairs activities.					
STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Maintain relationships with local officials and inspectors					Get ahead of issues, get members elected to boards. We want them to call us to sit at the table. Also see <a href="#">NAHB Lobbying Tips Checklist</a> .
Host a code official round table					Swap ideas with <a href="#">Maria Moore</a> in Fredericksburg who grew their Builder - Inspector Breakfast
Current VP to be liaison to go meetings beginning in 2019					See <a href="#">NAHB Local Advocacy Guide</a>
Ask for those who would like to be involved					See Roll Call <a href="#">Increasing Advocacy Whitepaper</a>
<i>Formalize government affairs committee activities</i>					Contact <a href="#">Michael Bezruki</a> , Director of Grassroots at NAHB for grassroots strategies.
<i>Increase the attractiveness of serving on the government affairs committee</i>					Offer GA committee an extra incentive and change the pitch of the role.
Goal 2: Increase member awareness of the impact of the association on local, state and national issues.					
STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Invite government officials to GMM's and/or specific forums beginning in 2019.					Consider hosting joint events with the Realtor's Association
<i>Create lists of advocacy successes and distribute to entire membership</i>					Subscribe to <a href="#">NAHBNow blog</a> and <a href="#">Eye on Housing</a> to pull NAHB content.
<i>Distribute communications showcasing the <b>impact</b> of an issue on their businesses</i>					Consider creating "micro-volunteering" or intern opportunities for help writing.
<i>Educate entire membership on the value of government affairs and encourage their participation in the process</i>					Research <a href="#">NAHB Advocacy</a> including the <a href="#">NAHB Advocacy App</a>

<i>Integrate relevant information on government affairs into our existing communication channels</i>					See <a href="#">NAHB Housing Portal</a>
<b>Goal 3: Increase MVBA contribution to workforce development initiatives.</b>					
<b>STRATEGIES TO ACHIEVE OUR GOAL</b>	<b>Year</b>	<b>Assigned to</b>	<b>Due Date</b>	<b>Status</b>	<b>Notes/Resources Needed</b>
Create a committee within MVBA					Tap into <a href="http://nahb.org/SkilledLabor">nahb.org/SkilledLabor</a> for resources
Write a committee charge: to coordinate efforts with SEIDO, CSI, etc. & to be involved beginning 2019					Also see NAHB post about <a href="#">Iowa's program</a> and getting started. The group discussed bringing the tiny house project to other schools.
Seek appointment to or involvement in Local Workforce Development Boards or initiatives					See <a href="#">Workforce Development Council</a> and <a href="#">Local Employment Resource</a>
Develop an outreach plan to raise public awareness of the labor shortage issue					Contact <a href="#">Hill Country Builders</a> about their High School outreach program
Collect information on what is being done already and what is needed					See NAHB's List of <a href="#">High School CTE, 2 year, and 4 year programs</a> . Key contacts: <a href="#">Greg Zick</a> at NAHB and <a href="#">Tracy MacMaster</a> at HBI.
Encourage all sectors of the membership to offer internship or job shadow opportunities					See <a href="#">Job Shadow Day Resources</a>

## LEAD

Goal 1: Accomplish update of bylaws, policies and procedures by June 1, 2019.					
STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Create committee of 3-4 people by February 2019 meeting					<a href="#">Resource on bylaws development</a>
Clarify role and requirements voting rights of life directors					Find samples of policies and bylaws on NAHB HBA Resources page under <a href="#">Governance</a> .
Establish accountability for attendance and other expectations of directors					See sample <a href="#">Leadership Commitment Contract</a>
<i>Establish a Reserve Fund Policy and access guidelines.</i>					See <a href="#">Tools for Operating Reserves</a> for non-profits.
<i>Create checklist for updates to key policies, procedures and governing documents.</i>					See overview of <a href="#">Key Best Practices</a>
Goal 2: Establish plan for board orientation and training / onboarding for the executive committee					
STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
Schedule NAHB rep (Mary) to present to board in Feb / March					Be sure to also review of priorities and expectations. Contact <a href="#">Advisory Services</a> or see <a href="#">sample</a> .
Educate EO/ Training → deliver to board					Budget to send your EO to <a href="#">NAHB Meetings</a> and the <a href="#">AMC</a> for training and idea sharing.
Implement one-on-one training / mentoring between tenured and new board members					See <a href="#">Sample Mentoring Program</a> .
<i>Include an effective strategic plan update and report at each board meeting</i>					See <a href="#">Tactical Planning Resources</a>
<i>Schedule time for the EO to meet with new board members and new Exec members</i>					Provide incoming president with the <a href="#">Running Effective Meetings</a> handbook.

**Goal 3: Increase builder participation in leadership by 2 per year.**

STRATEGIES TO ACHIEVE OUR GOAL	Year	Assigned to	Due Date	Status	Notes/Resources Needed
President recruit 2 builder to reach out to other builders for leadership					See <a href="#">List of Engagement Tactics</a> from an ASAE presenter for ideas. Also see Board Source <a href="#">Guide to Building Your Board</a> .
Discount opportunities and incentives					Consider giving volunteer's "MVBA Bucks" to use as credit towards future events, etc.
Explore offering discount on parade fees for builders involvement using a points system					See article on <a href="#">Volunteer Gamification</a> to reward involvement.
<i>Start by increasing builder attendance at events to build relationships and show value</i>					<i>Rolling cash raffle: Draw one name but must be present to win. If winner isn't present, the pot grows for the next meeting.</i>
<i>Survey and compile feedback from builders</i>					<i>Why they do or do not get involved? What would motivate them to participate?</i>
<i>Ensure that board service is perceived as an honor and a desirable position.</i>					<i>Change the culture of board service. See <a href="#">Maximizing Effective Service</a> research.</i>

# The Strategic Plan Monitor: Life Directors (to elect one to be in charge)

## What duties does the plan monitor have?

The job of the plan monitor is simple. He or she reports regularly to the membership and Board of Directors on the overall progress of putting the strategic plan into action. This involves ensuring that the individual components of the work plan are organized and completed. In order to do this, the monitor works with the leadership and Executive Officer in assigning committees, task forces and members to develop the work plan and determine a timeline for completing each plan strategy. Lastly, the plan monitor communicates periodically with each committee or task force to ensure they are making adequate progress on their work plan.

## Job Description:

The *plan monitor* works with the leadership and Executive Officer in assigning committees, task forces and members to develop the more detailed work plan and determine a timeline for completing each plan strategy. The *plan monitor* oversees the execution of the association strategic plan. He/she is not charged with completing the individual tasks, rather it is a “big picture” position that requires leading all team members to ensure that the plan is a living document embedded in all activities of the association.

- Encourage all to be excited about the tasks and remind group of the end results that will be accomplished through completing all the steps along the way
- Report on the progress of the strategic plan at each board meeting
- Deliver updates at general membership meetings
- Guide web master to post the strategic plan on website
- Observe various timelines and remind individuals (board, staff and committee members) of key milestones and suggest adjustments as needed
- Monitor progress of committees and other working groups and alert board and EO of possible trouble spots and key successes
- Encourage celebrating interim successes
- Assist president and EO with annual status report and year in review column for the association newsletter

# The Work Plan

Goal: \_\_\_\_\_  
 Strategy: \_\_\_\_\_

Action Plan			Resource Requirements	
Key Events	Responsibility	Target Date	Line Item	\$

For committee & staff use

The work plan is the last step in developing the strategic plan. It is created by assigning strategies to committees, individuals or task forces who will be instrumental in implementing specific parts of the strategic plan. Developing a work plan provides an opportunity for participation by those who will be responsible for implementing the plan. The work plan should answer the following questions:

1. What needs to be done to accomplish each strategy?
2. Who should do it?
3. When should it be started and / or completed?
4. What are the financial and human resources required for each strategy?
5. How do we measure success?