

# **ST. CROIX VALLEY HOME BUILDERS ASSOCIATION**

## **Long-Range Plan**

**2008-2011**

*Plan meeting held on November 20, 2008  
Facilitated by Christine Shaefer, Turtle Bay Betterment*

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**The association’s Mission Statement is the guiding principle by which all leadership decisions should be measured. While elements may be liberally interpreted, overall, all association activities should relate to the mission.**

### Current Mission Statement

The St. Croix Valley Home Builders Association is a network of professional builders and associates that provides resources to our members to promote quality construction and positive relationships between members and the communities we serve.

*Following discussion, changes to the mission statement were suggested. This revised statement that SCVHBA will need to consider; otherwise, the existing statement continues as it stands...implemented by board approval December 2008.*

### Revised Mission Statement

“The St. Croix Valley Home Builders Association, a network of professional builders and associates, provides resources and opportunities to our members to promote quality construction and positive relationships between members and the communities we serve.”

## **Member Expectations**

Planning participants were asked to identify the expectations they had when they first joined St. Croix Valley Home Builders Association regarding what membership would provide them...

- Networking
- Information
- Exposure
- Resume
- Marketing
- Maintaining relationships
- Support the industry
- Combating issues
- Reputation/image
- Public events
- Getting business

The group discussed how well SCVHBA is meeting these expectations:

- For the most part, the consensus was that the expectations are being met
- Combating issues was singled out as an area in which SCVHBA is exceeding expectations
- Getting business was singled out as an area in which members likely perceive SCVHBA is not meeting expectations

## **Public Perceptions**

Participants were asked what they believe the general public would say today if asked, "What is St. Croix Valley Home Builders Association?"...

- Don't know
- Who?
- Tour of Homes
- Parade of Homes
- Home Show

Participants were asked would they *would like* the public to say if asked, "What is St. Croix Valley Home Builders Association?"...

- Know what the association does
- Professionals/reputable
- Involved in charitable endeavors/community involvement
- Advocate for homeowners
- Source of professional education
- That we survived
- Resource for information on housing

## **Perceptions of Non-Active Members**

Participants were asked to put themselves in the position of non-active SCVHBA members and comment on their perceptions, gleaned either from what participants have heard directly “on the street” or what the participants perceive non-active members are saying...

- Don't know what the association really does
- Cliques (though less so now)
- Tour of Homes/Home Show (these are positives)
- Association members looking to increase business, and they're not seeing that business being generated as a result of membership
- Associates joined because a builder with which they work encouraged them to, but often have very little activity after initially joining

## **Competition**

Participants were asked to reflect on the competition SCVHBA faces in regards to member retention and member involvement...

- Time
- Economy
- Money
- Chamber
- BATC
- The Builders Club
- Business Networking International
- Success Oriented Networking
- Fraternal organizations
- Family
- Civic groups

## **Strengths**

Employing the SHEL (strengths, hardships, expansions, log-jams) analysis of St. Croix Valley Home Builders Association, participants identified the following (internal) strengths of the association...

- Staff (Jill and also Bill)
- Events
- Members – involved/professionalism
- Volunteers
- Strong relationships among members
- Business development and contact opportunities
- Many opportunities if members take advantage of them
- BBW/PAC fundraising
- Strong leadership (board and committees)
- Discounts (member-to-member local offers, too)
- Advocacy/government affairs

## **Hardships**

Participants identified the following (internal) hardships of SCVHBA:

- Member retention
- Declining revenue
- Cost of membership – helping members understand purpose of dues; reason for state & national dues required at each local
- Not enough member involvement
- Staff level – could use more
- Lack of understanding of what the association does
- Amount of competition for members' time and money

## **Expansion**

Participants identified the following (external) expansion opportunities for SCVHBA...

- Education for contractors
- MN builders building in St. Croix's area
- Association as vehicle for business promotion
- Advertising on website/website in general
- Digital communications
- Continuing to improve events
- Increase buzz about the association/increase awareness
- Develop media relationships

## **Log-jams**

Participants identified the following (external) log-jams to SCVHBA...

- Impact fees
- Consumer confidence
- Credit availability/non-qualified purchasers
- Building codes
- Lot costs
- BATC/Builders Group
- Economy/stock market
- Local municipalities
- Environmental issues
- Public education about the building process
- WBA/NAHB dues – having to pay both at every local in which a company belongs
- Disaster/terrorism

## **Beginning the Play Book**

A long-range plan is, in many ways, like a playbook for a football team. Participants were asked to identify what will help the association win.

Participants identified what a “touchdown” would look like for SCVHBA. Participants were then asked to select the top six items:

- Surplus budget (4 votes)
- Increase membership (5 votes)
- More member involvement (2 votes)
- Have positive impact on housing affordability (1 vote)
- Increase awareness (1 vote)
- Increase networking (0 votes)
- More connection to community groups & be recognized for it (2 votes)
- Increased event participation (both by members & public) (3 votes)
- Fundraising events for association (1 vote)
- Improve consumer education (5 votes)
- Promote positive attitude (1 vote)
- Formalize education program (6 votes)
- Pro-active in government affairs issues (including codes, development, etc) (0 votes)
- Increase staffing (7 votes)
- De-emphasize/provide alternatives to alcohol/gambling at GMMs (2 votes)
- Be more inclusive in political activities, across all parties; utilize policies to ensure fairness (1 vote)
- Education re: government affairs work (4 votes)
- Give members opportunity to host events at their locations (1 vote)
- Create open forum; opportunities to speak freely (2 votes)

*Careful review of the perceived touchdowns revealed that many could serve as strategies under more broad goals.*

## **Objectives & Strategies**

Based on discussion throughout the day, with emphasis on the ranked priorities just identified above, the participants agreed upon six major objectives for the association for the next three years. Potential strategies to implement each objective were also enumerated. (An outline of a work plan to lead to the accomplishment of these strategies and objectives follows at the end of this plan document.)

### ***Objective #1 – Annually achieve a net positive fiscal outcome.***

Potential strategies:

- Develop financial policies and adhere to them
- Develop investment policy
- Consider percentage to set aside to reserves each year
- Transparency to members regarding financial position

### ***Objective #2 – Formalize and implement a member (industry) education program***

Potential strategies:

- Establish Education Committee
- Work to cross-certify classes
- Look at all opportunities – internal, partners, University of Housing
- Safety education is required for many trades, perhaps provide this
- Create program to be a source of non-dues revenue
- Marketing/generate attendance

### ***Objective #3 – Improve consumer awareness and education***

Potential strategies:

- Hold seminars for consumers re: industry issues
- Expand consumer resources on web site
- Establish marketing plan to drive consumers to the web site
- Encourage member use of logo
- Create & distribute member certificates
- Sponsor existing events/classes
- Work with media to get earned media placements

#### ***Objective #4 – Generate 20% net increase in membership***

Potential strategies:

- Increase member involvement
- Deepen member understanding of what the association does
- Education about and expand member benefit discount program
- Member spotlight (chargeable) in newsletter...spotlights with online directory
- Promote Members in the News section of web site
- Improve benefits of Tour of Homes and Home Show
- Enhance recognition
- Develop SPIKE program

#### ***Objective #5 – Generate among members greater understanding of and involvement in the housing advocacy arena (government affairs)***

Potential strategies:

- Develop plan for addressing housing advocacy issues
- Define association's role in housing advocacy
- Solicit broad input
- Explain financial impact of proposed changes & call for action
- Establish positions on issues where appropriate
- Encourage municipal officials to see association as a resource

#### ***Objective #6 – Right-size staffing***

Potential strategies:

- Match staff level to member benefits desired
- Evaluate resources to end result – look for alternate ways to accomplish tasks
- Consider securing intern(s) from local schools
- Evaluate what tasks can be delegated and qualifications of person to whom they could be delegated

## **Work Plan**

This plan is a working document that must be used as a tool, not read and put away until 2011. All work of St. Croix Valley Home Builders Association for the next three years should relate to reaching the objectives outlined in this plan – both those enumerated above and, if appropriate, those identified through the process. (The plan must be flexible to respond to currently unforeseen changes in the market, government, etc.)

Primarily, the planning process identified six main objectives for SCVHBA and potential strategies to implement toward achieving those objectives. Next steps for the association include:

- 1) Announce to all members that their association went through a long-range planning process and identified six main objectives to guide SCVHBA over the next three years
- 2) At every opportunity, remind leaders of the objectives and provide regular updates to the entire membership
- 3) Begin filling in the work plan sheets, first with the potential strategies and then with additional, appropriate strategies to keep the association moving toward successful achievement of each objective
- 4) Be sure the work plan clearly identifies target completion dates and individual or group responsible for overseeing each strategy
- 5) The Board of Directors should receive periodic (not less than quarterly) reports on the progress made toward each objective and determine if action at that time is sufficient or if changes need to be made to a strategy, priority, assignment, etc.
- 6) The Board of Directors should consider the elements of this plan when making decisions regarding association activities (priority should be given nearly exclusively to decisions that make positive progress toward achieving plan objectives)
- 7) Time should be allocated throughout the next three years to create contingency plans in case of natural disaster, terrorism, sudden loss of an event or staff, etc

**St. Croix Valley Home Builders Association**  
**Long Range Plan -- 2008-2011**  
*Work Plan: Objective #1*  
**Objective: Annually achieve a net positive fiscal outcome**

<b>Goals</b>	<b>Assigned To</b>	<b>Target Completion Date</b>
Develop financial policies and adhere to them	Jesse Smith	ASAP
Develop investment policy	Jesse Smith	2009
Consider percentage to set aside to reserves each year	Jesse Smith	2009
Transparency to members regarding financial position	Jesse Smith	2009

**St. Croix Valley Home Builders Association**  
**Long Range Plan -- 2008-2011**  
*Work Plan: Objective #2*  
**Objective: Formalize and implement a member (industry) education program**

<b>Goals</b>	<b>Assigned To</b>	<b>Target Completion Date</b>
Establish Education Committee/Task Form	Tera Snyder	Done
Work to cross-certify classes	Tera Snyder	Ongoing
Look at all opportunities - internal, partners, University of Housing	Tera Snyder	2009
Safety education is required for many trades, perhaps provide this	Tera Snyder	2009
Create program to be a source of non-dues revenue	Tera Snyder	2009
Marketing/generate attendance	Angie Bendt	2009

**St. Croix Valley Home Builders Association**  
**Long Range Plan -- 2008-2011**  
*Work Plan: Objective #3*  
**Objective: Improve consumer awareness and education**

<b>Goals</b>	<b>Assigned To</b>	<b>Target Completion Date</b>
Hold seminars for consumers re: industry issues	Tera Snyder	2010
Expand consumer resources on web site	Angie Bendt	Ongoing
Establish marketing plan to drive consumers to the web site	Angie Bendt	Ongoing
Encourage member use of logo	Angie Bendt	Existing
Create & distribute member certificates	Angie Bendt	???
Sponsor existing events/classes for education	Tera Snyder	2010
Work with media to get earned media placements	Angie Bendt	2009

**St. Croix Valley Home Builders Association**  
**Long Range Plan -- 2008-2011**  
*Work Plan: Objective #4*  
**Objective: Generate 20% net increase in membership**

<b>Goals</b>	<b>Assigned To</b>	<b>Target Completion Date</b>
Increase member involvement	Tera Snyder	2009
Deepen member & consumer understanding of what the association does	Angie Bendt	2009
Education about and expand member benefit discount program	Tera Snyder/Angie Bendt	Existing
Member spotlight (chargeable) on website	Angie Bendt	2009
Promote Members in the News section of web site & newsletter	Angie Bendt	2009
Improve benefits of Tour of Homes and Home Show	Mike Dockendorf & Cheryl Ross	Ongoing
Enhance recognition	Tera Snyder	Ongoing
Enhance SPIKE program	Tera Snyder	2010

**St. Croix Valley Home Builders Association  
Long Range Plan -- 2008-2011**

*Work Plan: Objective #5*

**Objective: Generate among members greater understanding of and involvement in the housing advocacy arena (government affairs)**

<b>Goals</b>	<b>Assigned To</b>	<b>Target Completion Date</b>
Develop plan for addressing housing advocacy issues	Public Policy Committee	2009
Define association's role in housing advocacy	Public Policy Committee	2009
Solicit broad membership input	Public Policy Committee	2009
Explain financial impact of proposed changes & call for action	Public Policy Committee	2009
Establish positions on issues where appropriate	Public Policy Committee	2009
Encourage municipal officials to see association as a resource	Public Policy Committee	2009

**St. Croix Valley Home Builders Association  
Long Range Plan -- 2008-2011**

*Work Plan: Objective #6*

**Objective: Right-size staffing**

<b>Goals</b>	<b>Assigned To</b>	<b>Target Completion Date</b>
Match staff level to member benefits desired	Executive Committee	Ongoing
Evaluate resources to end result – look for alternate ways to accomplish tasks	Executive Committee	2009
Consider securing intern(s) from local schools	Executive Committee	2011
Evaluate what tasks can be delegated and qualifications of person to whom they could be delegated	Executive Committee	Ongoing