



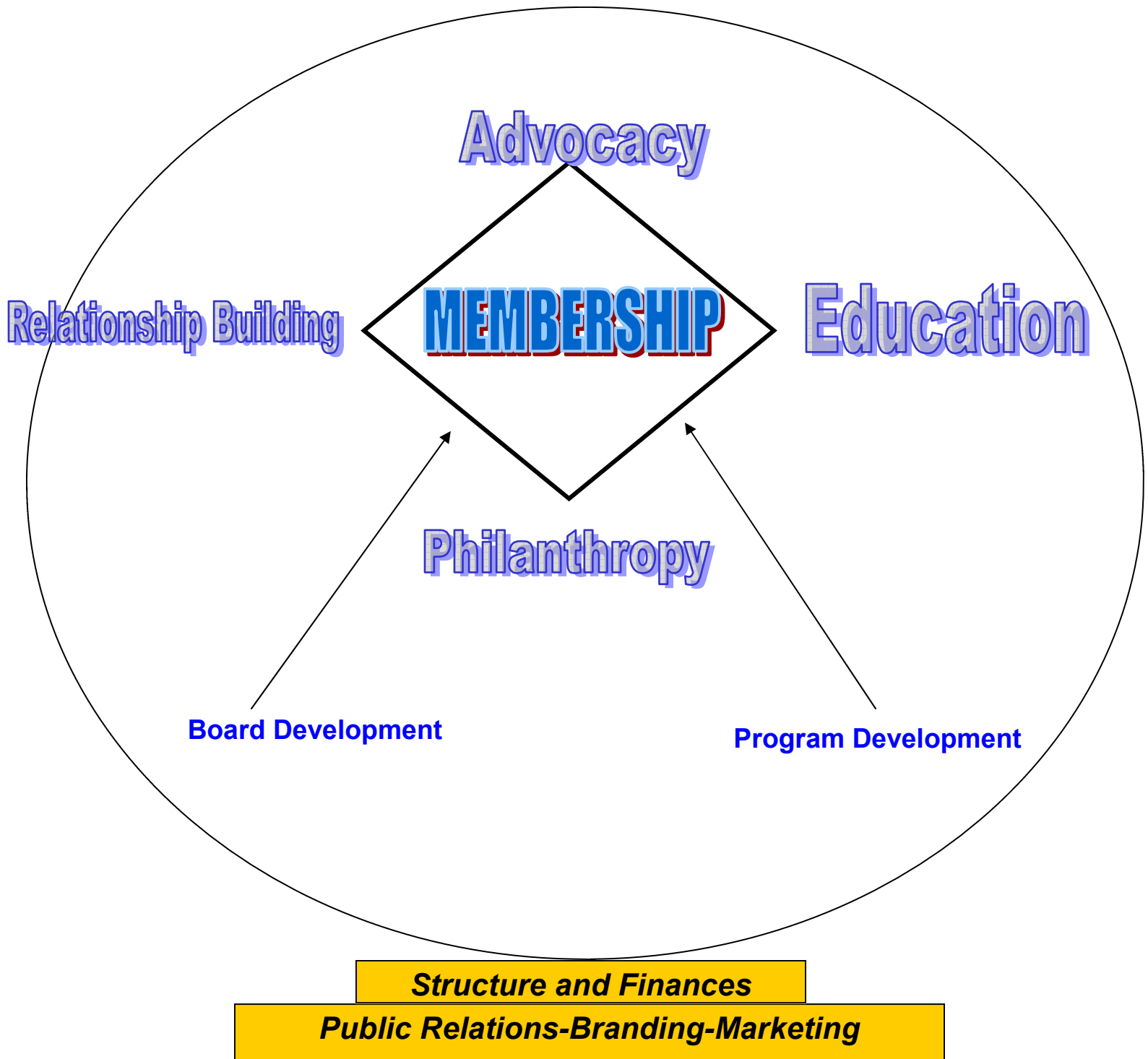
CBIA

2011-2013

Strategic Plan

Committee Draft Presented: June 2010
BOD Task Force Input and Review: August 2010
BOD Acceptance: August 17, 2010

The Field of Play for CBIA



CBIA
Officers and Board of Directors
2010

President

David Aldrich

Associate Vice President

Stacey Herring

Secretary

Kerry Weber

Treasurer

Tom Wegwert

Past President

Thomas Lykos, CGR, CAPS

Presidential Appointee

Bob Imig

Executive Vice President

Kathy Curatolo

DIRECTORS

1st Year Builder

Travis Smith

Jay Waltbiling

Steven Cambria

2nd Year Builder

Alex Parker III

Ray Allain

1st Year Trade Associate

Stephanie Gray

Kaleigh Grover

2nd Year Trade Associate

Alan Foy

Jack McKelvey

1st Year Professional Associate

Pierre Bruno

2nd Year Professional Associate

Brian Fleming

Dave Arter

Presidential Board Appointee

Barbie Rogers

Council Chairs

Mike Rosen, Developers Council

Shelley Kienzle, Ambassador Retention Membership Committee

Laura Johnston, Communications & PR

Jim Butler, Golf Committee

Melissa Ahern, Governmental Affairs Committee

Steve Lawson, SPIKE

Patty Wedge-Ludwig, Business Builder Council

Brian Connell, CGR, CAPS, CGP, Remodelers Council

Cheryl Deering, Sales & Marketing Council

This plan has been developed around our four cornerstones:
Advocacy, Education, Relationship Building and **Philanthropy**.

Overarching factors addressed in the plan to ensure success included
Association Development (structure and funding) and
Public/Relations/Rebranding of the association.

The process began in April 2010. Special thanks must go to the initial planning group of Jim Hamilton, Tom Lykos, Fritz Sullivan, Tom Wegwert, Mont Williams, David Aldrich and Kathy Curatolo who worked over a period of two months beginning with a SWOT (strengths, weaknesses, opportunities, threats) and thorough analysis before drafting the goals.

The draft was presented to our Board of Directors, Committee and Council Chairs in June 2010. Subsequently, a BOD Task Force appointed by President Aldrich was convened to offer input and consensus for acceptance of the final Strategic Plan. Laura Johnston, Steve Lawson, Barbie Rogers, Mike Rosen Tom Wegwert and Kathy Curatolo met for two meetings in August.

The next step will be design of annual action plans. BOD, committees, councils and staff will all lend a hand in developing and implementing our action plans. Task Force volunteers will be sought on an as needed basis. Annual action plans will be brought to the Board of Directors for review at our yearly retreats.

Our strategic plan is intended to provide a blueprint for the work of CBIA over the next three years. In order to be effective : the following issues must be addressed in order to move forward.

CBIA Officers and BOD must agree to support the plan.

CBIA staff members must be on the same page as the plan reads and understand what is expected of them to move forward.

Awareness and input in the action plans from Councils, Committees and the respective Chairs and Co-chairs is essential.

Awareness among all members of CBIA.

Human and financial resources will be a challenge but if we can work as one team, the opportunity for strengthening our organization and improving the business climate for our members will certainly result.



Advocacy-Influence Elections

- 1. Develop a legislative platform conducive to member needs Year 1**
- 2. Develop a process and structure for vetting candidates Year 1**
- 3. Improve process for vetting candidates Year 2**
- 4. Endorse Candidates Year 2**
- 5. Grow/Support candidates for local office Year 4**

Action plans based on these goals will be developed annually by our Government Affairs Committee and Executive Officer. Part of the action steps must include dissecting each voter district in Collier County and polling our members in conjunction with other civic/professional organizations. This will provide the data on how many voters we have in each district and help us pinpoint future campaigning. We also need to develop structured candidate interviews and ensure participation by our members. CBIA should set-up a *political action group* that would hear issues from the various committees and other partner organizations like NABOR, Chamber and FAHB and focus on establishing the planks of our advocacy platform.

A basic voter registration campaign sponsored by CBIA should be implemented immediately to provide credibility within the community and let candidates know we are involved.

A working collaboration with local government agencies on county regulations as well as a working relationship with the Florida Home Builders Association relative to State issues and the National Home Builders Association relative to national issues affecting our industry must be in place.



■ Advocacy-Change/Eliminate/ Improve Industry Regulations

- 1. Define regulatory Issues Year 1**
- 2. Expedite review of LDC, change processes Year 1**
-communications issue
- 3. Develop working relationships with industry regulators Year 1**
-communications Issue
- 4. Encourage CBIA member representation on boards/committees Year 1**
- 5. Affect personnel selections on Gov. boards & committees Year 3**

Action plans based on these goals will be developed annually by our Government Affairs, Developer's Council, Commercial Council, Task Force members on an as needed basis and our Executive Officer with staff support.

They will require collaboration with local government agencies as well as a working relationship with other professional organizations within Collier County. An inventory of on-going open seats and current expirations on related Collier County and State boards and committees should to be developed and shared with CBIA members to encourage participation.

It should be noted the review and changes of the LDC is currently being led by our Developers Council. Communicating progress and changes to our members through various venues will be important.



■ Advocacy-Partner with Civic/ ■ Professional Organizations

- 1. Engage our members in active participation Year 1**
- 2. Actively support outcomes Year 1**
- 3. Define partner organizations/determine Year 3
common goals and interests**
- 4. Facilitate/lead collaboration Year 3**

Action plans for these goals will be developed by the President and Executive Officer with input from BOD, Council and Committee Chairs. In order to effectively engage in collective efforts cross-communication between and among BOD, Councils and Committees will be critical. Mechanisms will need to be put in place to more effectively recruit among our membership for representation on collective initiatives that serve to promote our mission.

Our Director of Member Services will assist to ensure cross-communication.
Our Director of Membership will share these opportunities in
soliciting new and renewing members.



■ Advocacy-Public

- 1. Promote/market our members to public Year 1**
- 2. Develop systemic P.R. plan relative to individual member Year 2 and organization recognition**

Action plans must incorporate marketing strategies which promote our members to the public. An interesting concept to this end is to create a piloted discount book to distribute throughout the community.

This must be reflected in our rebranding strategies as we explore "outside-the-box" ideas for promoting CBIA members to the public.



■ Education - Members

- 1. Determine member needs re: licensing, certification, relevant topics Year 2**
- 2. Determine instructors, cost, profit Year 1 & 2**
- 3. Advertise and deliver programs Year 2**

Action plans for these goals will initially be developed by an Education Task Force made up of members representatives who will benefit from continuing education and training programs. It will require Executive Officer and Director of Member Services support.

We should expand the educational opportunities to all members, not just licensing issues for contractors but in other areas of interest as well...examples similar to the ULI programs on sustainable construction materials and techniques or efficient landscaping and irrigation via rain water harvesting etc all for a fee per session. Advertise and charge more for non-members.



■ Education-Awareness: Leadership

- 1. Drive value of CBIA at CEO level Year 1**
- 2. Re-engage past leadership on specific initiative(s) Year 1**
- 3. Increase Board development and engagement Year 2**

Action plans will be developed by the President and Executive Officer. Strategic Planning Teams noted the importance of re-engaging past leaders. Example models exist within the EDC and Chamber. We need to borrow from the models to build "exclusivity" and at the same time "support." When it comes time for sponsors and/or company participation at an event or through a council, task force or committee, CEO support will drive better participation.



■ Education-Awareness -Public

- 1. Determine how/what resources CBIA can provide to public Year 1**
- 2. Develop plan to inform/educate public on issues of construction industry and how they are affected negatively or positively Year 2**
- 3. Full Implementation of Plan Year 3**

Action plans will require input from BOD, all councils and committees. From programs that promote community participation to government affairs affecting home owners in general, we will need to determine means for financial and legislative support.

All staff will be required to lend a hand in affectively meeting this goal.



■ Networking- Relationship Building

- 1. Design a planned approach for integrating programming among groups, councils, committees Year 1**
- 2. Execute plan of integration and stand-alone programs Year 1**
- 3. Plan and implement better information flow among members Year 1**

Competition among council programming/participation, sponsorship development and limited staff coupled with the need to bring our members back under one umbrella was an issue of concern among all participating in the strategic planning process. However, what we learned from the initial sharing is that we must incorporate programming that meets the specific needs of each council.

Everyone agreed we should go back to general membership meetings at list for 6 of 12 months each year. It was strongly suggested that we hold our own **Pre and Post Session Legislative presentations** for two of our general membership meetings.

These events could be open to the public for an additional charge. At each GMM reports from all appropriate committee chairs if needed could be placed on the agenda inviting a guest speaker on a relevant topic and providing time for member- to- member relationship building and networking. Each of our councils and or committees could assist in developing applicable programming/sponsor/speakers for these meetings. We must take advantage of captive audience at events. Have an influential person delivery information about our accomplishments on behalf of members relative to cornerstones. We need to cut these programs during the summer months of July and August as too many members are on vacation.



■Philanthropy

- 1. Evaluate role of the Foundation Year 1**
- 2. Develop a pre-planned annual approach providing branding and name recognition in the community Year 3**
- 3. Implement Plan Year 4**

In our action plans we need to adopt a cause and stick to it !!
It needs to be a win-win for charity but also CBIA.



Association Development: Relative to Cornerstones

. Organizational Structure

- 1. Phase out member participation in management/operations
Year 1**
- 2. Personnel Evaluation and Development to support Strategic
Goals Year 1**
- 3. Increase member participation that is project specific Year 1**
- 4. Realign organizational chart to have Developers and Commercial
Builders Councils under Government Affairs Committee. Year 1**

Action plans will require an alignment of staff job descriptions, expectations and accountability measures to Strategic Plans and prioritizing needs. The Executive Officer will need to develop a strong team in order to build confidence, trust and cohesion among the staff. It should be noted that this plan is built upon at the very least, three staff members working full-time for CBIA.

We must expand our member volunteer base in project specific initiatives given the limited staff we have with no projections to grow staff over the three year period.



Association Development: Relative to Cornerstones

■Organizational Funding

- 1. Create and market value of membership Year 1**
- 2. Increase member retention Year 2**
- 3. Increase funding from outside sources Year 1**

We must re-examine and market the "value" of membership in CBIA to more effectively retain members. At the same time, programming must be developed through outside funding sources if we are to increase revenue. We must consider programs that would entice the public participation.
One such example is the "Parade of Home."



■Public Relations-Branding-Marketing Umbrella

- 1. Develop a comprehensive marketing approach Year 1 to re-brand CBIA**
- 2. Determine stages of implementation Year 1 & 2**

This strategic planning requires rebranding and better exposure of CBIA. Who we are, what we represent and why members should be involved needs to be examined to provide the basis for rebranding. The p.r. plan and rebranding must take into consideration individual member as well as organizational needs and recognition. This will affect all aspects of our planning and subsequent action from legislative affairs to programming and retaining members.

A rebranding effort must include an expert task force...perhaps from expert members of SMC...who can share their knowledge and expertise relative to branding.

Technology, specifically our website, should play a role in this goal. We need to ensure the website is placed high on search engines and develop a full range of member enhancements on our site. We also need a calendar with integration to registration at events.

Awareness of our role and activities must be broadened beyond "member—to—member" to the public.