

# Strategic Planning Workshop

Friday, May 16, 2008

Meadowbrook Country Club

Moderator

**Dale Eilerman**, Conflict Resolution

Participants

**Ray Bell, CR**, Greater Dayton Building & Remodeling

**Gary Porter, CR, CKBR**, G.A. Porter Construction, Inc.

**Billy Brinck**, Ferguson Enterprises

**Erich Eggers, CKBR, CGR**, Remodeling Designs

**Chris Elrod**, RAVE-Reliable Audio, Video & Electronics

**Rich Fullam**, Supply One

**Tim Garrison, CR, CKD**, Home Towne Construction

**Kim Haverstick, CR, CGR**, Haverstick Builders

**Mike Kline**, Accuclose

**Rick Miller, CPCU**, Miller Insurance & Financial Services LLC

**Bill Montgomery, CIC, OPHP**, Insurance Works LLC

**Alan Pippenger**, Requarth Lumber Company

**Kim Fantaci**, Miami Valley NARI Executive Director





# Mission Statement

As the authority in the remodeling industry, Miami Valley NARI develops and sustains programs that foster ethical conduct, sound business practices, and professionalism by bringing together contractors and suppliers in the remodeling industry and by serving as a resource for the home and business owner.

# 2004 SWOT Analysis

MV-NARI	Internal	External
Positive	<p style="text-align: center;"><b><u>Strengths</u></b></p> <ul style="list-style-type: none"> <li>• Staff</li> <li>• Core membership</li> <li>• Certification program</li> <li>• Networking</li> <li>• Home Show</li> <li>• Complaint review/ethics</li> <li>• Community involvement</li> <li>• Financial stability</li> </ul>	<p style="text-align: center;"><b><u>Opportunities</u></b></p> <ul style="list-style-type: none"> <li>• Improve member education</li> <li>• Provide new and improved member benefits</li> <li>• Build member participation in meetings, activities</li> <li>• Raise consumer awareness</li> <li>• Collaborate with other organizations</li> <li>• Increase racial diversity</li> <li>• Expand impact on legislation and regulation</li> </ul>
Negative	<p style="text-align: center;"><b><u>Weaknesses</u></b></p> <ul style="list-style-type: none"> <li>• Inadequate recruitment of new members</li> <li>• Poor membership retention</li> <li>• Shallow core membership, lack of involvement by many members</li> <li>• Lack of involvement by past-presidents</li> <li>• Failure to adequately involve associate/supplier members in the organization</li> <li>• Lack of associate/supplier participation in the organization</li> <li>• Lack of small business management training for members</li> <li>• Lack of a cooperative relationship with the BBB and other associations</li> <li>• Organizational complacency, stagnation</li> <li>• Lack of a formal mentoring process, structured peer program</li> <li>• Lack of a local chapter mission/vision</li> <li>• Lack of racial diversity in membership</li> <li>• Lack of community service involvement</li> <li>• Poor consumer awareness</li> <li>• Lack of a marketing plan</li> <li>• Limited opportunities for networking</li> <li>• Limited ability of staff and volunteers to take on new projects/added work</li> </ul>	<p style="text-align: center;"><b><u>Threats</u></b></p> <ul style="list-style-type: none"> <li>• Lack of professionalism in the remodeling industry</li> <li>• "Lone Ranger" mentality in the remodeling industry that resisting joining an organization</li> <li>• Poor local economy</li> <li>• Lack of time for remodelers to become involved in MV NARI</li> <li>• Competition for membership from BBB, HBA, Chamber of Commerce, etc.</li> <li>• Fewer locally owned and operated suppliers who are most likely to provide volunteer time</li> <li>• Threats to members indirectly have an impact on the organization               <ul style="list-style-type: none"> <li>○ Poor local economy</li> <li>○ Restrictive legislation and regulation</li> <li>○ Inadequate labor pool</li> <li>○ "Fly-by-night" companies</li> <li>○ Increasing costs and complexity of business</li> </ul> </li> </ul>

# Current Reality

## What has changed in the past 4 years?

Economy has worsened.

Competition has become more fierce.

Time available by members for the association has lessened.

More remodelers see membership as important to establish credibility.

Where employees for our members are coming from.

Fixed resources have changed.

The Association is looked to as a resource by members of the local industry.

The relationships Miami Valley NARI has developed with the local vocational schools.

Many local builders and their employees are now shifting to remodeling providing educational opportunities for Miami Valley NARI.

Technology with the addition of new products and emerging trends.

The ability to stay ahead of the curve when it comes to technology.

## What are your competitors doing that impacts Miami Valley NARI?

Pushing forward with "Green" and other trends aggressively.

Installed sales programs and "big boxes" are marketing heavily.

The local BBB is aggressive and can affect Miami Valley NARI as far as referrals.

Angie's List and other "non-face" (Internet) entities are becoming a part of our culture.

## What are your collaborators doing that impacts Miami Valley NARI?

Relationship with BBB is in infancy stage – changed during the past four years.

Somehow we need to work with HBA – their new leadership may help.

Outreach committee will pay dividends in the future

Potential collaboration and integration of light commercial remodeling

## WIIFM for current/potential members?

Welcomed feeling is appreciated with quality work and referrals.

Light commercial remodelers – how do we attract and interest?

Training and educational offerings to enhance skill sets.

Financial benefits from supplier members – opportunity to market better.

The Association is not as diverse as it could be which affects where and how business is developed.

Which elements of the current SWOT need to remain, be modified or be eliminated?

What needs to be added to a new SWOT?



# Development of Strengths

What does Miami Valley NARI do exceptionally well?

What advantages does Miami Valley NARI have over its competitors?

What valuable assets and resources does Miami Valley NARI have?

What do members of Miami Valley NARI identify as the Association's Strengths?



# Strengths

## Organizational Structure

Volunteer Leadership / Core Members

Committee Leaders and Members / Board of Directors

Paid Staff

Culture being Supportive and Inclusive

## Education

Certification

Training and Educational Offerings

Consumer Education

Consumer Remodeling Guide

Outreach Program

Website

## Networking

Executive Level Involvement (Key Personnel) from Member Firms

Informal Mentoring

## Financial Stability

Revenues from Home Show

Return on Investment is Substantial for Members' Time and Money

## Focus on the Remodeling Industry

Largest Remodeling Organization in the Miami Valley

Active Remodeler and Supplier Participation



Development of

# Weaknesses

What could the Association do better?

What does Miami Valley NARI receive criticism or complaints about?

Where is Miami Valley NARI vulnerable?



# Weaknesses

## Core Membership

Continued Improvements and Efforts Are Being Made

Limited Ability of Staff and Volunteers to Take on New Projects or Added Work

Lack of a Cooperative Relationship with the BBB and Local Chambers

Poor Consumer Awareness

Lack of an Overall Marketing Plan

Lack of a Method to Participate, Monitor and Respond to State Legislative Issues

Code Issues on a Local Level



Development of

# Opportunities

What opportunities exist for the Association that have not yet been addressed?

Are there emerging trends on which Miami Valley NARI can capitalize?



# Opportunities

## Improve Member Education / Certification

Continued Improvements and Efforts Are Being Made  
Enhance and Improve Small Business Management Training  
Creation of a Formal Resource List  
Educate Members on Emerging Trends

## Provide New and Improved Member Benefits

Continued Improvements and Efforts Are Being Made  
Education Specifically for Suppliers to Develop Better Relationships with Remodelers

## Build Member Participation

Continued Growth of Participation Has Been Seen

## Raise Consumer Awareness

## Collaborate with Other Organizations

BBB / HBA / NKBA / MVBOC / Board of Realtors / DSID / Ohio Landscape Association / Region IV NARI Chapters / NARI National

## Increase Diversity

Collaboration With Other Organizations  
Recruit and Retain Sub-Contractors and Specialty Contractors  
Racial / Ethnic / Gender  
Recruit and Retain Contractors With Emphasis on Light Commercial

## Awareness of Emerging Trends

Green Remodeling  
Technological Opportunities



# Development of Threats

What threats make Miami Valley NARI vulnerable and keep the Association from achieving its plans?

What external roadblocks exist that block Miami Valley NARI's progress?

Are there changes in the Association's potential membership?

Are economic conditions affecting the organization's viability?



# Threats

## Poor Local Economy

Consolidation of the Industry

Representatives' Territory Expansions

Showroom Consolidation

Lack of Time On the Part of Industry Participants to Become Involved with NARI

Competition for Membership and Dues Dollars From Other Organizations and Networks

## Legislative Impact and Awareness

Code Issues



# Next Steps

Send report to the Strategic Planning Workshop participants for review and agreement.

Distribution date to participants is May 16, 2008.

Participants should respond by May 23, 2008 with any suggested changes.

Report sent to the Miami Valley NARI Board of Directors for ratification.

Report will be made at May 27, 2008 Board of Directors meeting.

Miami Valley NARI Strategic Planning Committee to develop 2009-2011 Strategic Plan based on report.

Committee will meet initially on June 24 from 12:00 p.m. – 2:00 p.m. with monthly meetings scheduled beginning in July and ending in December 2008.

Release 2009-2011 Strategic Plan to Miami Valley NARI membership.

Welcomed feeling is appreciated with quality work and referrals.

Light commercial remodelers – how do we attract and interest?

