

3 Teams for the 2020 Vision Plan

Our Builders' 2020 Vision Plan is built around three teams for guiding implementation: Grow Membership, Be First-in-Class and Run Services Like a Business. We are now proceeding with direction from the board retreat and establishing some structure and focus for the teams.

For each team, a purpose is stated as a 'charter,' a team roster is set out, work product is described, and a timeline is provided. The intent is to provide the teams with a general objective and begin with some specific end products in mind and over what time horizons. If your team would like to modify the parameters, just say so and why.

For each team roster, a team coordinator is noted in **boldface**. They are: Robin Norris (1), Erica Jenkins (2) and me (3). The coordinators should each set an initial meeting over the next month, maintain notes and prepare periodic progress reports. I would anticipate the member leaders would provide research guidance, be a sounding board for implementation plans and be team liaisons to our board of directors.

1. "Grow Membership" Team

Charter: Blend current focus on membership count to qualitative bases of assessing The Builders' industry engagement and the strength of our communities of practice. Recruit a business development staff lead. Sell membership.

Team 'Owners' Roster:

- Staff: **Robin Norris**, Don Greenwell, Miles Boyer, Matt Trachsel, Becky Mitchell, Bill Wien and [new Business Development leader]
- Member Leadership: Shawn Burnum; Jerry Daugherty and Alex Gonzalez (Membership Recruitment and Diversity Team Co-Chairmen)
- Members-at-Large: The Builders' "Membership Recruitment & Inclusion Committee" serves to assist the core team listed above.

Milestones - Work Product (Deadlines – Schedule):

- 1) Implement the 2017 Marketing and Sales Blueprint Plan (Throughout 2018 w/reports of Performance)
- 2) Develop a Position Description and compensation structure for a Business Development Leader (5/31/18)
- 3) Recruit, select and on-board a Business Development Leader (8/30/18)
- 4) Continually develop list of top prospect targets and specific recruitment plans (Throughout 2018)
- 5) Initiate a new member onboarding program "Builders' Ambassadors" (10/31/2018)

2. “Be First-in-Class” Team

Charter: People are what make organizations excel. Focus on human resources management to energize staff culture and talent.

Team ‘Owners’ Roster:

- Staff: **Erica Jenkins**, Greg Davey and Kristy Peto
- Members Leadership: Shawn Burnum and Dirk Schafer

Milestones - Work Product (Deadlines – Schedule):

- 1) Gather benchmark sources of performance evaluation systems (4/30/18)
- 2) Overhaul Builders’ performance evaluation system (6/30/18)
- 3) Draft or redraft position descriptions (7/31/18)
- 4) Outline cross service collaboration opportunities (8/31/18)
- 5) Offer development programs – Promote at All-Staff Meeting (9/30/18)
- 6) Initiate team building activities (10/30/18)

3. “Run Services Like a Business” Team

Charter: Operate the six sets of services more like businesses needing to demonstrate a net measurable contribution.

Team ‘Owners’ Roster:

- Staff: **Don Greenwell**, Phil Shoemaker, Richard Bruce, Ryan Johnson and Tony Drees
- Member Leaders: Chris Stanton, Jerry Schafer and Angie McElhane

Milestones - Work Product (Deadlines – Schedule):

- 1) Develop a simple event and service evaluation process / Request members to evaluate their service experiences. (An overall Membership Satisfaction Survey will be conducted in 2019) (Throughout 2018)
- 2) Perform and report cost accounting (Accounting 2018 with financial reports to Executive Board 7/19/18 and Full Board 11/16/18)
- 3) Assess fair market pricing to modify pricing points and policies for member vs. non-member rates (6/30/18)
- 4) Develop marketing and promotional plans for service sets (7/31/18)
- 5) Identify service extension and new service development ideas (9/30/18)