



# **PHBA** **STRATEGIC** **PLAN**

**2024-2028**

# MESSAGE FROM THE CHAIR

Dear Members of the Perth-Huron Builders Association (PHBA),

As the Chair, I am excited to present our strategic priorities that will steer our association towards a prosperous and sustainable future. This strategic plan is a testament to our shared vision and commitment to the growth and success of our industry.

Our strategic priorities are as follows:

**Membership:** PHBA seeks to retain current members and increase membership by implementing strategies that focus on recognition, ongoing learning opportunities and tailored specific benefits for all PHBA members, in the Huron Perth region.

**Succession/Education:** PHBA would like to prioritize succession and education to ensure a skilled workforce in the trades, aligning historical direction with current needs.

**Collaboration:** PHBA is committed to growing partnerships to embrace and leverage diverse perspectives within the industry, to foster economic growth and efficiency.

These priorities reflect our dedication to not just meeting, but exceeding the expectations of our industry and our community. Your active participation is crucial in bringing this strategic plan to life, and I encourage each of you to engage with these priorities in meaningful ways.

Thank you for your unwavering support and commitment to the PHBA. Together, we will build a brighter future for our association and the communities we serve.

Warm regards,

**Montana Wilson**

Chair,  
Perth-Huron Builders Association





## VISION STATEMENT:

PHBA is a leader in the local, professional construction industry, setting the example for excellent standards and innovation.

## TAG LINE:

Building and Enriching our Community for Future Generations.

## MISSION STATEMENT:

PHBA is the professional voice of the local building and renovation industry, advocating for economic growth and community needs. PHBA bridges industry, government, and community, promoting education and innovation for a better future.

## VALUES STATEMENT:

PHBA: Excellence, Collaboration, Innovation.

**Excellence:** We commit to upholding the highest ethical standards characterized by transparency, integrity, fairness, and honesty.

**Collaboration:** We foster a spirit of collaboration among diverse industry partners to serve the needs in our community.

**Innovation:** We encourage creativity, adaptability, and a willingness to navigate change.

## STRATEGIC PRIORITIES

### Emerging Strategic Priorities:

- **Membership:** PHBA seeks to retain current members and increase membership by implementing strategies that focus on recognition, ongoing learning opportunities and tailored specific benefits for all PHBA members, in the Huron Perth region.
  - **Rationale:** As PHBA evolves, sustaining and expanding its membership is crucial to cultivate a supportive environment that champions growth and fosters active engagement among current and prospective members
  - **Anticipated Outcomes:** By prioritizing membership retention and growth, PHBA anticipates building a stronger community with increased member engagement, higher event attendance by both current and new members, and improved communication of PHBA's value, to ensure PHBA's long-term sustainability and relevance
- **Succession/Education:** PHBA would like to prioritize succession and education to ensure a skilled workforce in the trades, aligning historical direction with current needs.
  - **Rationale:** As PHBA evolves, PHBA must continue to think of ways to best support the growing demand for updated information and resources to address members' pain points and be a trusted advisor in the industry.
  - **Anticipated Outcomes:** By emphasizing succession and education, PHBA anticipates a skilled workforce of new tradespersons to carry on the legacy of PHBA and more robust information/resources to offer members and keep members informed.
- **Collaboration:** PHBA is committed to growing partnerships to embrace and leverage diverse perspectives within the industry, to foster economic growth and efficiency.
  - **Rationale:** As PHBA evolves, collaborations with municipalities and schools allows PHBA to effectively enhance community engagement initiatives, showcase social responsibility, and facilitate industry relations.
  - **Anticipated Outcomes:** By committing to collaboration, PHBA anticipates stronger relationships with municipalities, leading to favorable and smoother regulations for stakeholders. Additionally, investing in members and partners will contribute to industry success.

## APPENDIX A: INTERIM REPORT

### BACKGROUND

In October 2023, Melissa Schenk, Executive Officer, Perth Huron Builders Association (PHBA) invited Credence & Co (Credence) to lead a strategic planning process for PHBA.

In January 2024, Credence provided a survey to stakeholders with an invitation to reflect on PHBA's mission and purpose and to provide insights regarding PHBA's strategic direction for the next five years. The survey was live from January 23 – February 6, 2024. To complement the insights gathered from the survey responses, Credence conducted three group interviews with the Board.

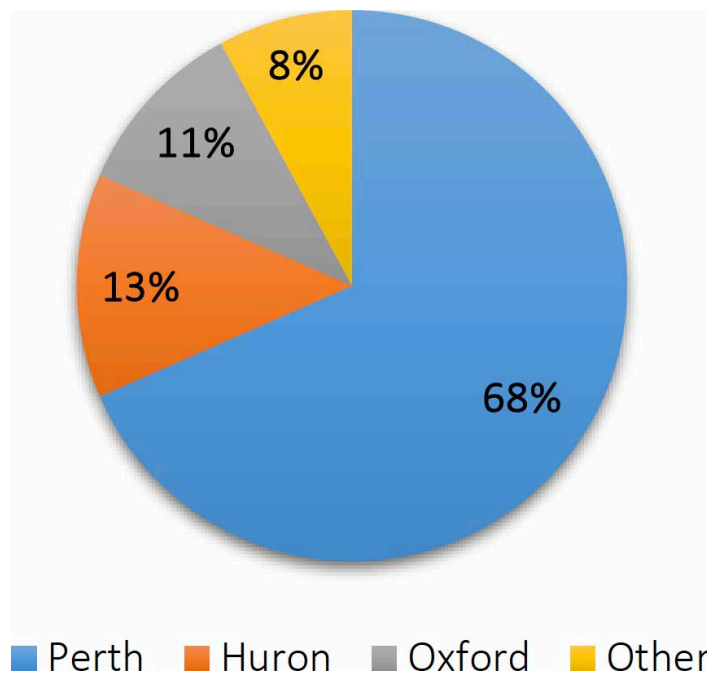
This document is an Interim Report, based on the feedback collected from the surveys and interviews. The Report will be used to support the upcoming Strategic Planning sessions on February 26 and March 5, 2024.

This report provides a high-level overview of the themes identified in the surveys and interviews. To protect the confidentiality of those surveyed and interviewed, this report identifies the feedback shared with Credence in an aggregate fashion. In this document, "a few" refers to 10 - 24% of survey and interview respondents, "some" refers to 25–49% of respondents, "many" refers to 50 -74% of respondents, and "most" refers to 75%+ of respondents. In general, comments heard only once are not included in the report unless they are uniquely instructive to PHBA.

### DEMOGRAPHICS

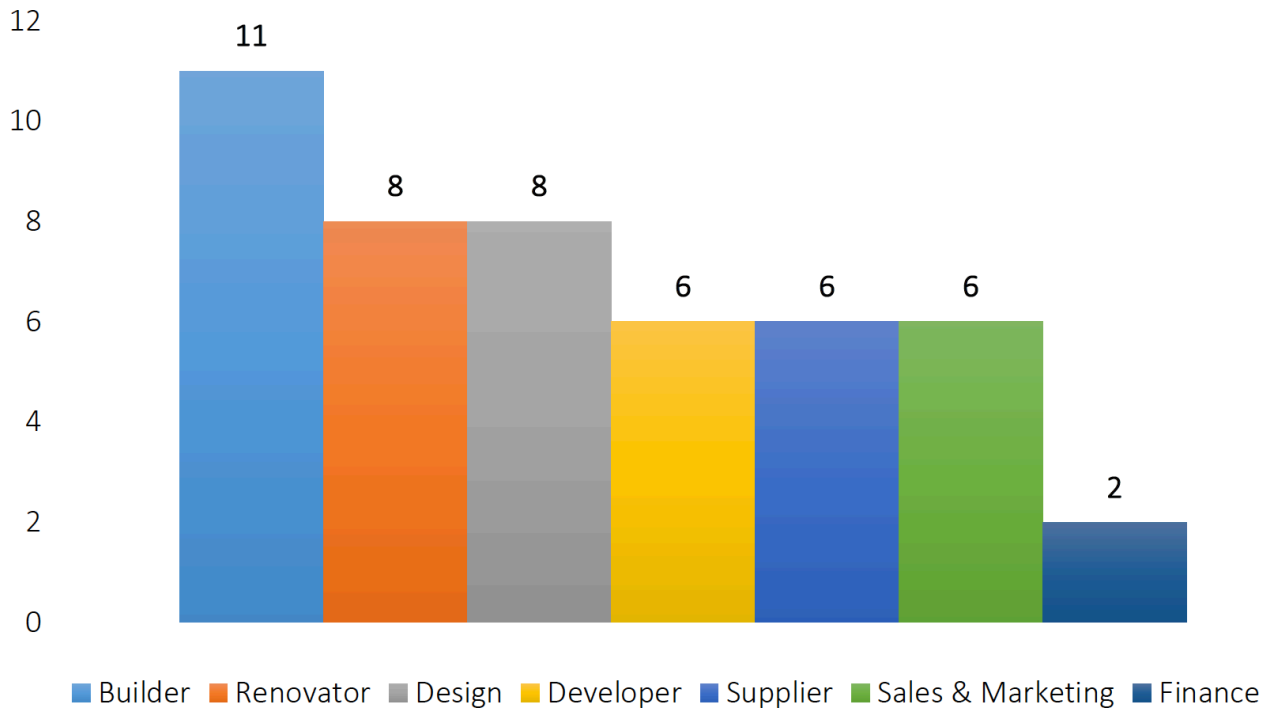
The demographic information is based upon 34 respondents. The demographic distribution is displayed below:

#### Company Location



*Note: Companies may work in a number of locations.*

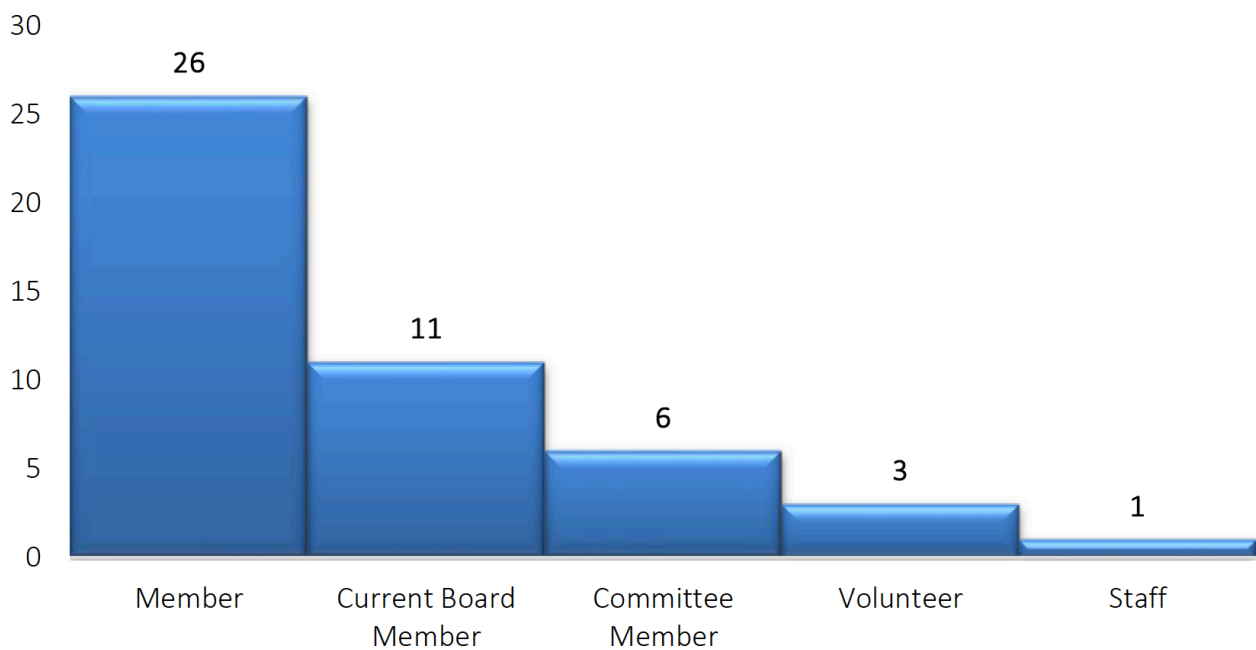
### Designation/Occupation of PHBA Members



**Observations:** While the majority of PHBA members are builders, PHBA also represents various other occupations in the construction industry.

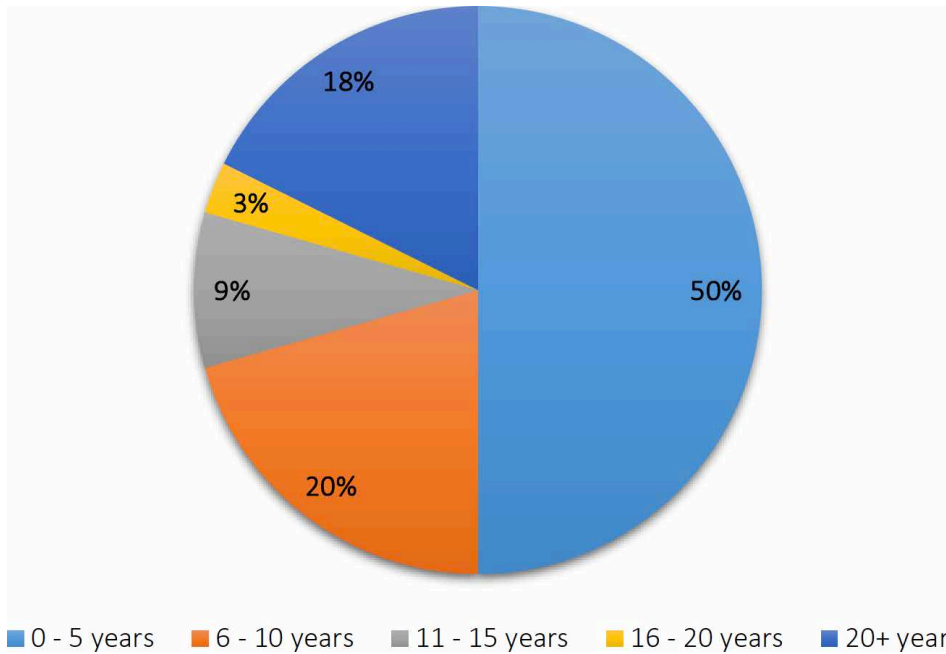
**Note** that survey respondents were able to select multiple responses to this question.

### Connection to PHBA: Position



**Note** that survey respondents were able to select multiple responses to this question.

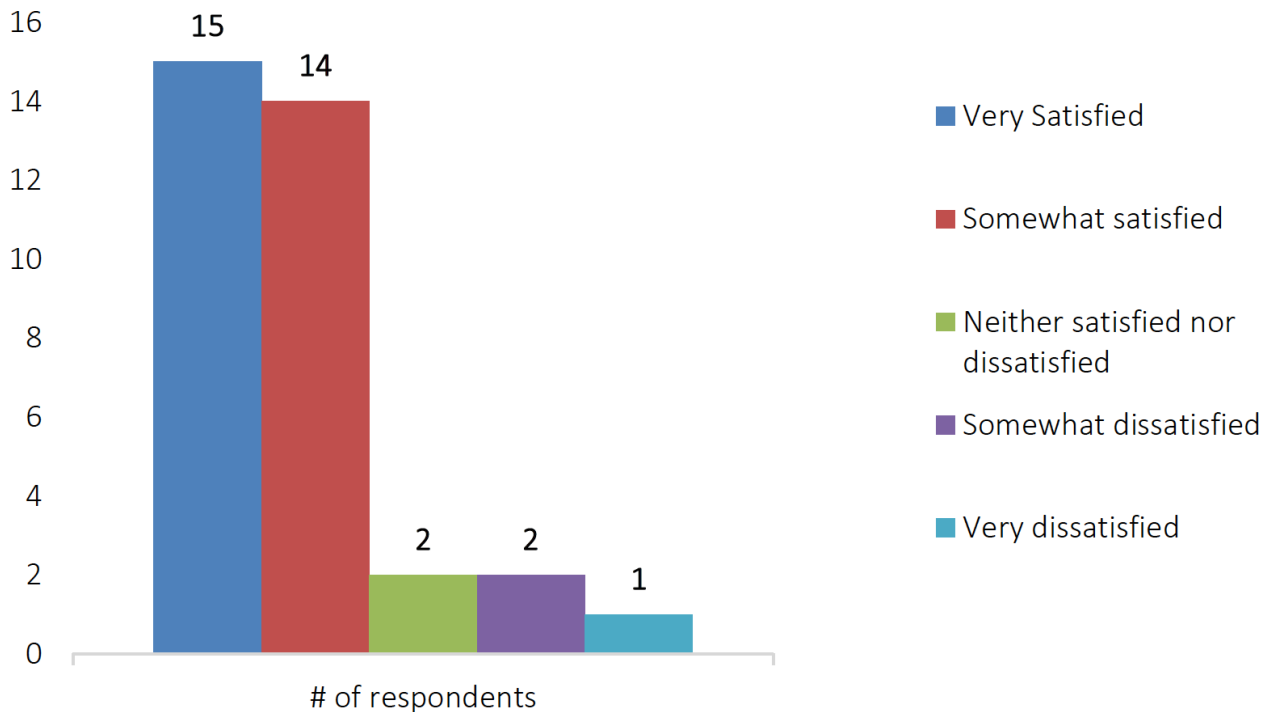
## Years Connected to PHBA



**Observations:** 18% of those who completed the survey have been affiliated with PHBA for 20+ years. This indicates that PHBA has been successful in retaining some long-term members while attracting new members.

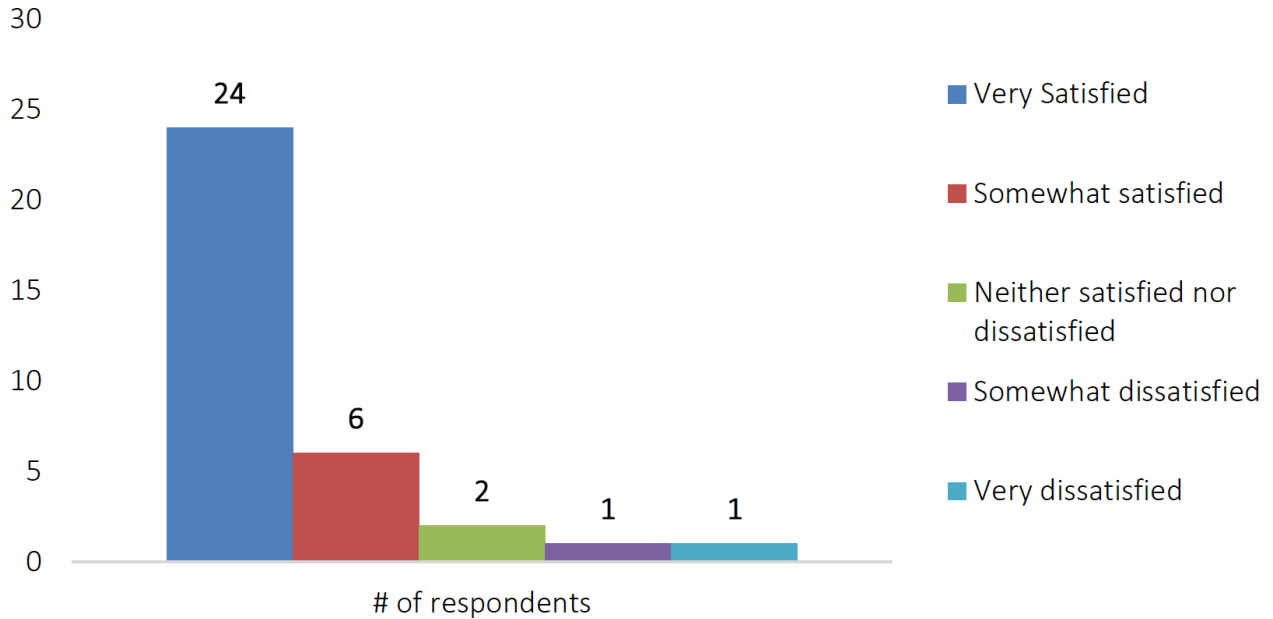
## MEMBERSHIP SATISFACTION

### Satisfaction Levels of PHBA Membership Benefits



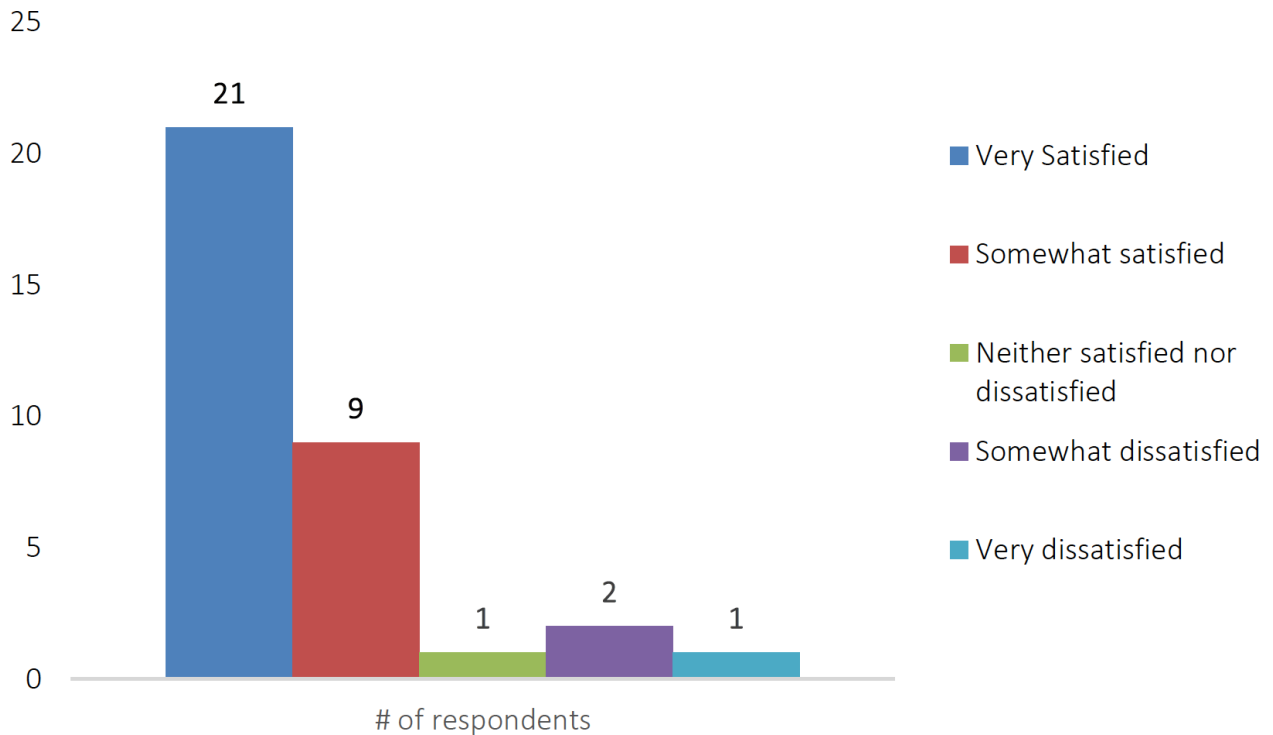
**Observations:** Generally, PHBA members are satisfied with their membership benefits.

### Likely to Renew Membership



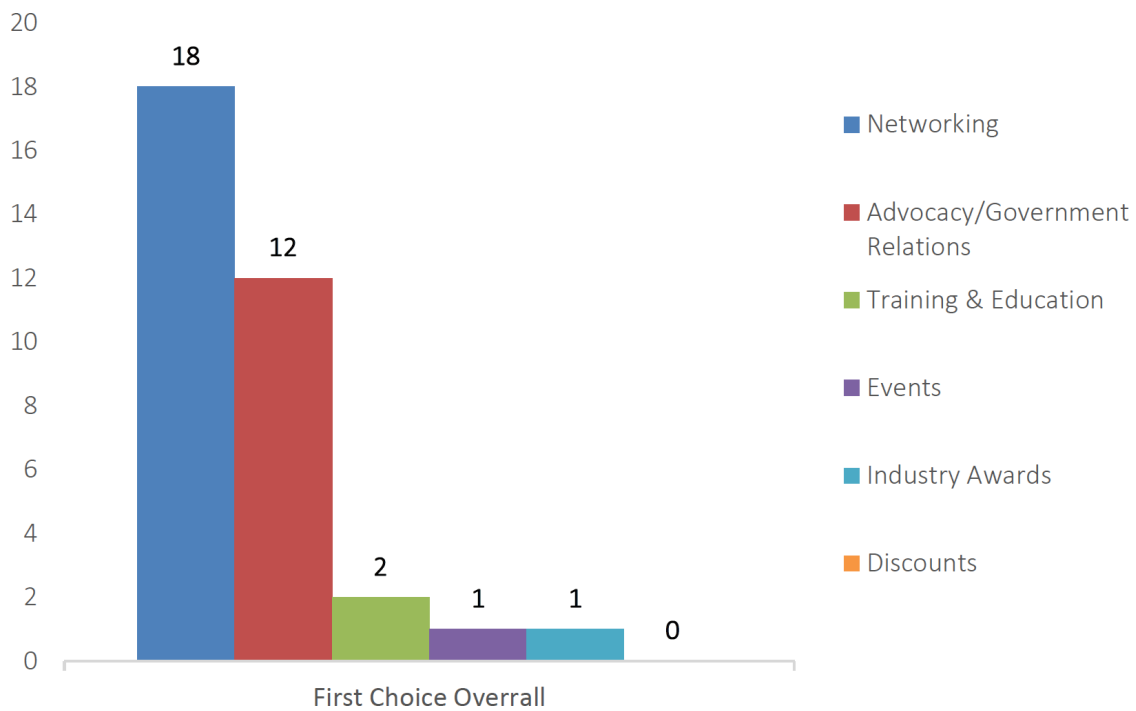
**Observations:** 71% of respondents are likely to renew their membership.

### Likely to recommend membership to others

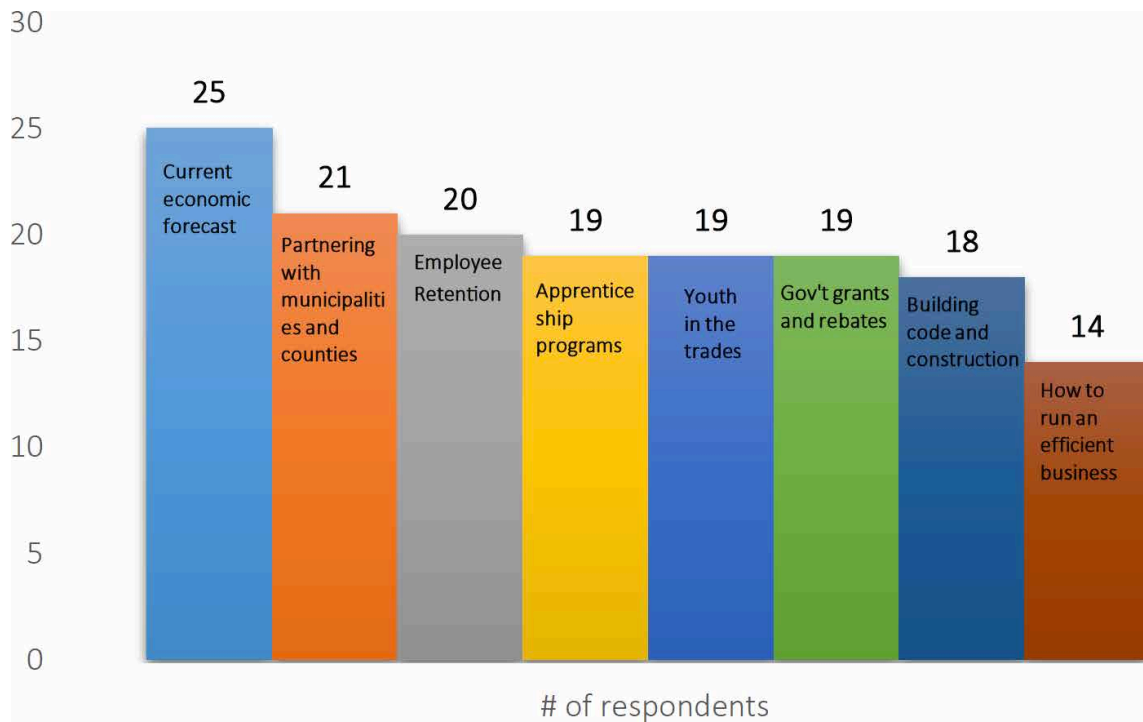


**Observations:** 62% of respondents are likely to recommend PHBA to others and are very satisfied with their membership. A question for reflection: In what ways can PHBA improve their membership to ensure that those who are somewhat satisfied AND those who are somewhat or very dissatisfied can have a better experience?

### PHBA Benefits by Importance



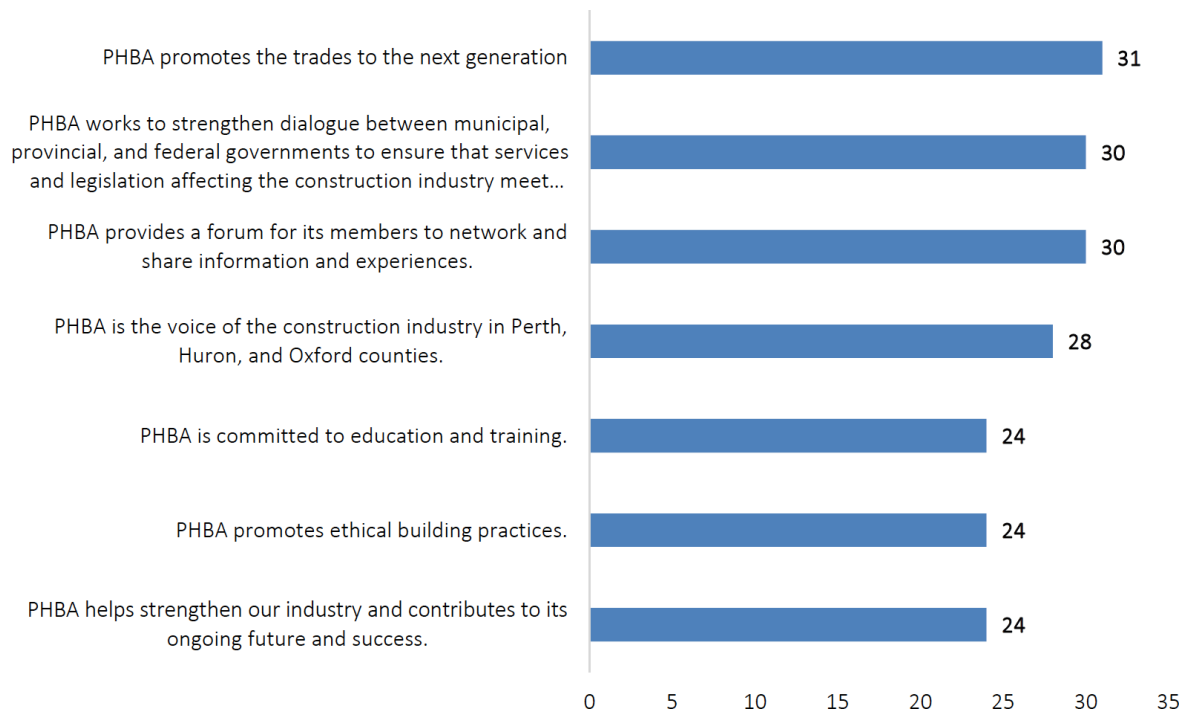
### Lunch and Learn: Ranking of Topics of Interest for PHBA Members



**Note** that respondents were asked to choose the top 6 topics of interest out of 10 options provided for this question. 8 options appear in the graph above because youth in the trades, apprenticeship programs and government grants and rebates all had the same number of respondents (fourth overall).



## What strategic priorities are still relevant for PHBA today?



## STRENGTHS AND CHALLENGES

Members express appreciation for PHBA and the excellent work that is accomplished by working together. The following section explores themes gathered from the surveys and interviews.

### 1. Strengths:

- **Community:** Most express their appreciation and gratitude for having a space where like-minded individuals can come together and support one another, especially in an industry that can be isolating and siloed. Most share that the networking opportunities PHBA provides are valuable and allow the diversity of members to come together as they face similar challenges, to develop a collective voice to tackle and approach larger issues, and goals. PHBA has created a unique environment where both seasoned and newer members feel comfortable to engage and interact with one another.
- **Resources:** Some welcome and appreciate the wealth of industry knowledge that PHBA offers, noting that members bring a wealth of resources and insights on current trends and upcoming changes that impact on the residential and non-residential construction industry.
- **Advocacy:** Some appreciate the effort PHBA has made to increase awareness of the residential and non-residential construction industry through championing the rights of members at the local, provincial (OHBA) and federal levels (CHBA). These respondents note that this type of advocacy allows members to thrive.
- **Diversity:** A few value the fact that PHBA cares for members and welcomes professionals from a variety of industries and backgrounds. Those offering this feedback highlight the value of diversity in the Board composition where individuals come from a cross-section of professions and perspectives.

## 2. Areas of Growth:

- **Membership:** Some respondents affirm that membership retention and engagement should be a key focus over the next five years. Some acknowledge the importance of a growing PHBA membership. However, some note that more can be done over the next five years to enhance membership that reflects all aspects of the industry. Those offering this feedback note that enhancing membership will help both retain current members and attract new members. These voices suggest enhancing membership by providing more events; ensuring that networking events are relevant to members; continuing to keep members informed of current news in the industry; and better communicating the value of PHBA to members.
  - **Value-add:** A few wonder how PHBA can help members and potential members better understand the value of joining PHBA given that membership is costly and subject to association fee changes. These respondents share that businesses are looking for savings due to the increase in the cost of living. They note that if members do not find value in the membership, PHBA could be faced with declining engagement.
  - **Expansion of PHBA Membership:** A few express a desire for PHBA to expand into different counties to better reflect the fact that local builders are expanding their own work into other municipalities. A few are curious about how PHBA can grow in areas like Huron County and Listowel and are curious about what expansion can look like.
- **Engagement:** Some PHBA volunteers are experiencing fatigue. A few respondents describe a need for a renewed volunteer base, expressing the importance of encouraging a more active membership and engaging and attracting new volunteers. A few express a desire for clearer role requirements for volunteers.
- **Government Regulations:** A few respondents express concern over regulation in zoning, planning, and development, saying that these government processes create hurdles and delays. These voices share that this can be limiting and burdensome especially for small developers/builders.
- **Next Generation of Tradespersons:** Some share and encourage PHBA to focus on recruiting the next generation of tradespersons by exploring and prioritizing a mentorship program where current tradespersons are paired with high school students to pique their interest in the trades. These voices describe a desire for PHBA to promote trades as a viable occupation to the next generation.

**3. Next Five Years:** Credence asked respondents to reflect on the following questions “Five years from now, what do you want to see PHBA doing? What opportunities should PHBA be pursuing? What are the key questions PHBA should be wrestling with as an association?”.

- **Membership (Engagement/Retention):** Some respondents would like to see PHBA continue to grow and flourish locally in order to be viable in the future. Some share the following examples as potential ways of increasing and retaining members: (a) continued training that focuses on current trends; (b) marketing; and (c) consistent events, possibly bi-weekly, with more speakers from across the sector.

Some wonder if there is a sustainable plan in place to support member retention and to continue to build a consistent and effective volunteer base. Some offer that a sustainable plan to support member retention and to continue to build a consistent and effective volunteer base needs to be included in the strategic plan and that a succession plan for volunteers (specifically those on the Board) needs to be part of PHBA's plan and policies. A few would like the pathway to become a Board Member to be more transparent.

- **Initiatives:** Some describe ways in which PHBA and the industry could pursue growth in the future. Some want PHBA to invest time and resources into promoting the trades to the next generation, along with inviting newcomers and women into the field. With increasing demands for skilled trade workers, there is significant concern that without targeted and focused recruitment, the industry will not be able to meet future demands. Those who see this as a priority say that activities that encourage youth and women to join the trades might include: (a) providing skills/up-skills training; (b) scholarships for women

entering the trades; (c) government subsidies to support hiring; and (d) a mentorship program.

• **Education:** Some respondents describe the importance of PHBA providing resources that educate members along with municipalities/counties. The following list represents specific topics and resources some would like to see addressed/offered:

- Seminars on affordable and sustainable home design along with continued education on the costs to develop housing.
- Workshops/Seminars specifically on the topics of the building code, Net Zero, EnergyStar, and R-2000 Courses (standard courses for energy efficiency and new construction builds).
- Technological advances that impact the industry.
- Knowledge of PHBA and its importance for the wider community.

• **Advocacy:** A few express gratitude for the role that PHBA plays in advocating for the rights of those in the residential and non-residential construction industry. A few hope that, in the next five years, PHBA will continue the good work of being “the voice” of the industry, being a bridge between tradespersons and the government, and supporting and promoting local trades and companies. Additionally, a few hope that PHBA will be united as one voice with OHBA and CHBA, to strengthen the industry, maintaining strong relationships for a positive environment.

- **Increase industry diversity:** In the next five years, a few want to see PHBA expand the industries currently supported, to allow space and focus on other professionals (e.g., renovation and supply professionals) to ensure an increase in membership.

• **Questions:** A few respondents offered the following questions in reflecting on key questions that PHBA should be wrestling with as an organization in the next 5 years:

- How can PHBA be a stronger advocate and have greater input into decisions made by municipalities?
- How will automation affect the trades?
- What is PHBA's identify in a post covid world?
- Is it time to pursue a stronger relationship with the seven local associations as opposed to putting so much energy into OHBA?
- How can PHBA continue to inform members around the changing industry trends related



## APPENDIX B: FEBRUARY 28, 2024 SESSION SUMMARY

### BACKGROUND

In October 2023, Melissa Schenk, Executive Officer, Perth Huron Builders Association (PHBA) invited Credence & Co (Credence) to lead a strategic planning process for PHBA.

From January to February 2024, Credence provided a survey to stakeholders with an invitation to reflect on PHBA's mission and purpose and to provide insights regarding PHBA's strategic direction for the next five years. To complement the insights gathered from the survey responses, Credence conducted three group interviews with the Board.

Upon completion of the stakeholder engagement process, Credence leveraged insights from the survey and interviews to design and plan the Strategic Planning Sessions on Wednesday, February 28 and Tuesday, March 5, 2024. This document reflects the conversations that came out of Session One on February 28, 2024, with a working document for potential Mission, Vision and Values that PHBA can wrestle with.

### STRATEGIC PLANNING SESSION ONE OVERVIEW

The Board received the Strategic Planning Session well, with participants engaging in lively conversations and asking insightful questions about what the Mission, Vision, and Values of PHBA could look like in the future.

To begin the session, Credence invited the Board into small groups to reflect on one experience that captured "PHBA at its best". The stories shared, captured instances of PHBA at its best with appreciation for the Home Show, the Golf Tournament and how PHBA has grown and continues to feel like a family. As an outcome of their sharing, the Board came up with the following words and themes that capture the organization at its best:



## INTERIM REPORT DEBRIEF OVERVIEW

Credence & Co. presented the Interim Report from the internal stakeholders' survey, which resonated with the Board, who shared the following thoughts:

- The Board found the high representation of Oxford members in the interim report interesting.
- The Board recognized the significant growth in members within the 0–5-year range, indicating ongoing interest in the association.
- Survey respondents reported pleasingly low dissatisfaction levels, suggesting overall satisfaction with PHBA. The Board acknowledged the value of having statistics on member satisfaction, providing new insight to reflect on.
- Networking emerged as the top benefit of PHBA membership, while the last three benefits were not surprising due to time constraints of the Board.
- The Board discussed transparency within the board structure, considering improvements in outreach and feedback loops for a more diverse organization.
- The Board noted differences between PHBA and OHBA in terms of advocacy focus, with a focus on regional voices and understanding member needs.

During the large group debrief, the Board shared their observations and reflections from the small group discussions, including points of pride, opportunities, and challenges. Thoughts from this conversation include:

- The Board highlighted Melissa's role as Executive Officer within PHBA, emphasizing her positive impact on the organization.
- The Board raised concerns regarding volunteer engagement and burnout, highlighting the need for strategic priorities to address these issues, and the potential for increasing paid staff hours.
- The Board offered general thoughts about the level of involvement and expectations for board members, the need for Board member spotlights, and enhancing creativity in AGM presentations.

## VISION, MISSION, VALUES GROUP DISCUSSION OVERVIEW

### Vision

The Board envisioned the future of PHBA, focusing on inclusivity, community involvement, and advocacy efforts and offered critical elements for an ideal vision statement for PHBA as follows:

- An emphasis on staying at the forefront of technology in building and automation.
- The desire to be a trusted advisor and first point of contact for the industry, with strong brand recognition.
- The need to continue adhering to ethical standards and advocacy for social consciousness in housing.
- The importance of building a multigenerational community and legacy-building.
- A need for fluidity, flexibility, and adaptability for the long-term success of PHBA.
- The need to address members' pain points, such as municipal approvals, labor shortages, and isolation.

- The value of peers collaborating to solve common problems and emphasizing non-members' differing perspectives.
- The recognition of PHBA's founding purpose as a collective voice for the industry.

### **Mission**

The Board reflected on PHBA's purpose, target audience, strategies, and desired outcomes of a mission statement stating the following:

- The importance of resolving issues with government organizations, advocating for the industry, and supporting members and the community.
- The target audiences of PHBA's mission are members and businesses within PHBA, as well as consumers and clients, emphasizing mutual accountability.
- Proposed strategies for achieving PHBA's mission include establishing liaison committees, hosting meetings and fundraising events, and fostering collaboration with all partners.
- The intended outcomes of fulfilling PHBA's mission are continuing learning and growth, creating a greater community to live in, fostering a unified voice, improving efficiency in government interactions, and leveraging social media for information sharing and event promotion.

### **Values**

The large group discussion included individual reflections on how to live out PHBA's values and feedback on the importance of PHBA's values. The following insights/words emerged as important to consider in developing a set of values for PHBA:

- Industry advocacy, partnership, succession planning, professionalism, leadership, accountability, adaptability, resourcefulness, and building community are integral to PHBA's mission and operations.
- PHBA's code of ethics are valuable and should be core to the foundation of developing a set of values for PHBA.
- The Board also highlighted the need for collaboration with other associations and the unique challenge of navigating partnerships with union-based organizations.

Throughout the session, the Board focused on community involvement, advocacy, and ensuring PHBA's continued relevance and effectiveness in serving its members and the broader community.