

## COMMITTEE ASSESSMENT

**Answer each statement by circling how you agree on a scale from 1 (Strongly Agree) to 5 (Strongly Disagree).**

<b>Goals or Purpose of Committee</b>	1 2 3 4 5
1) All committee members understand the goals and purpose of our committee.	
2) The committee members agree on the goals and purpose of the committee.	1 2 3 4 5
3) There is alignment between our goals and purpose and the actions taken and/or the decisions made by the committee.	1 2 3 4 5
<b>Support for the Committee</b>	1 2 3 4 5
4) Our committee has adequate resources (ex: budget, people) to support its function.	
5) Our committee has the respect and support of key stakeholders within our organization.	1 2 3 4 5
<b>Time and Location of Meetings</b>	1 2 3 4 5
6) Our meetings are held regularly and with appropriate frequency.	
7) Our meetings begin and end as scheduled.	1 2 3 4 5
8) The length of our meetings is appropriate and respectful of the agenda.	1 2 3 4 5
9) We receive the meeting agenda and materials in advance of the meeting to allow for appropriate review and preparation.	1 2 3 4 5
10) We consistently use our meeting time well. Issues get the time and attention proportionate to their importance.	1 2 3 4 5
11) The location where our meetings are held is conducive to positive group interaction and discussion.	1 2 3 4 5
<b>Attendance</b>	1 2 3 4 5
12) Attendance at our meetings is consistent and members arrive on time.	
13) Attendance at our meetings is evaluated as a criterion for continued membership on the committee.	
<b>Recording/Minutes</b>	1 2 3 4 5
14) The minutes of our meetings are accurate and reflect the decisions and next steps and/or action items articulated by the members.	
<b>Members</b>	1 2 3 4 5
15) Our membership represents the talent and skill set required to fulfill the goals and purpose of the committee.	
16) Our members treat each other with respect and courtesy.	1 2 3 4 5
17) Our members come to meetings prepared and ready to contribute.	1 2 3 4 5
18) As a general rule, when I speak, I feel listened to and that my comments are valued.	1 2 3 4 5

### General Comments:

19) What I like the most about our meetings is:

20) What I would like to see improve at our meetings is:

21) The areas I think the committee should focus on in the future are:

## HBA Culture of Recruitment: 4 Square

Let's brainstorm about your HBA's culture!

*Culture is not something you can actually see, yet it permeates the environment your association creates for its members. In other words, it is the values, beliefs, assumptions, experiences and habits that create your association's behavior and ways of working together.<sup>1</sup>*

<p><b>HBA core values</b></p> <p>Core values are essential and enduring tenets of the organization. Examples of core values are honesty, integrity, appreciation and hard work.</p>	<p><b>Purpose of recruitment</b></p> <p>Why are new members important to your HBA?</p>
<p><b>Frequency of recruitment</b></p> <p>Is recruitment a once or twice a year event for your HBA or does it permeate the board, staff, committees and membership? How?</p>	<p><b>Activities that demonstrate your values</b></p> <p>Leaders need to live the HBAs values so that others can learn about its culture. How does your HBA demonstrate its core values?</p>

***"People don't join organizations. People join people."***

<sup>1</sup>[XYZ University Blog](#) "Is Your Association's Culture Helping or Hurting Member Recruitment and Retention?"

## **The Chocolate Personality Test**

Ask everyone to take their favorite type of chocolate bar and then have them go to the four corners of the room. Have them re-introduce themselves to one another and find something else they have in common besides their chocolate preferences. All the Milk Chocolates, Krackels, Special Dark, Mr. Goodbar's are now all together. Before they eat them, read the following explanations for each choice. Point of the exercise-everyone is different, but you can always find something in common if you just strike up a conversation. Don't be afraid to find the common denominator and make an ask to get involved.

### **Special Dark**

Patient, thoughtful, individualist, problem solver. Likes to see a project through from start to finish. Good grant writers, works well with difficult people, insightful, reflective. Little patience with incompetence or liars. Sets high standards for self and others. Dependable, resourceful and loyal.

### **Mr. Goodbar**

You are analytical, logical. You gather data first before giving an opinion, play the devil's advocate at meetings, tend to see all the possibilities and drive people crazy by sharing all the "what ifs". Hate deadlines, put off starting things, procrastinator. Likes to be the expert but in your own period. Can analyze things to death. Like there to be rules that everyone follows. Likes a lot of structure and hates surprises..

### **Krackel**

Creative, optimistic, always see the cup 1/2 full, messy (messy desk) but organized (eventually find missing item). Likes to be a hands-on person; a little off-beat, ditzy, funny, friendly and outgoing, always willing to help. Like the surprising things in life, the "crackle". Like situations that follow flexibility, change and growth.

### **Milk Chocolate**

You are an all American, loves baseball, Mom and apple pie. Cheerleader for your program, level headed, good PR person, great fundraiser, and also kind, thoughtful, always remember everyone's birthday, playful. Nurturing, kind, help others to "shine" dependable and loyal. Others often turn to you for help.

	Boomers (Born 1946 – 1964)	Generation X (Born 1965 – 1981)	Generation Y (Millennial) Born (1982-2001)
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% of our membership from this generation

Size	78 million	48 million	80 million
Characteristics	Hard-working, loyal, confident, competitive	Anti-authority, self-reliant, family focused	Digital thinker, feel entitled, needy
Why they are the way they are	Grew up in a time of affluence, reared to pursue the American dream	Children of workaholics and divorce, reared to be self-sufficient	Micro-managed by parents, technology, always rewarded for participation, reared to be high achievers
Communication Styles	Prefer detailed dialog in-person or via phone, believe no news is good news	Prefer clear, concise communication – not over explaining, prefer email	Prefer frequent feedback and problem solving via technology instead of phone calls or meetings
Volunteer styles	Want to lead, like to manage others, like to hold meetings and discuss strategies	Want autonomy, hate being micromanaged or anything that wastes their time	Want structure, expect immediate feedback and increasing responsibility
Flaws	Have a “been there done that” attitude, not always open to new ideas	Have difficulty committing, tend to have “a wait and see” approach	Have short attention spans and high demands and ask “what’s in it for me”
Why they Join	Opportunities to lead and leave a legacy	Opportunities to further their careers	Opportunities to learn from others

Associations that are successfully attracting the next generation are focusing on:

- Culture (How do you define your association's culture)
- Contribution (In what ways are we offering our members to contribute to the work of the association)
- Career (How can we assist members in their career goals through volunteering)
- Community (How does the association build community among the members)
- Coaching (Once members volunteer how are we ensuring their successful in the task)
- Communication (Is our tone and speech always respectful of different perspectives)
- Connection (In what ways do we offer connection to our cause)

### Key Benefits of HBA Membership

	Makes Money for Members	Saves Money for Members	Makes Things Happen for Members
Example	Home Show	Affinity Programs	Government Affairs
NAHB			
State HBA			
Local HBA			

- Pay particular attention to those benefits that you believe resonate with you and your local members
- Next, identify those benefits that are tangible vs. intangible by placing an asterisk next to those that are intangible.
- Finally, note which ones likely resonate more with your members, i.e. tangible or intangible. Why?

## Overcoming the 'No'

1. It's too much money.

Response: \_\_\_\_\_

2. I don't have time.

Response: \_\_\_\_\_

3. We're cutting back.

Response: \_\_\_\_\_

4. Maybe later.

Response: \_\_\_\_\_

5. I'm already a member of another association.

Response: \_\_\_\_\_

6. I just don't see the benefit for me.

Response: \_\_\_\_\_

7. I get the benefits whether I join or not.

Response: \_\_\_\_\_

8. Someone else here is already a member.

Response: \_\_\_\_\_

9. I was a member before and didn't get anything out of it.

Response: \_\_\_\_\_

10. I need to ask someone else.

Response: \_\_\_\_\_

## Checklist for Gauging the Health of Your Association

*Ideally you should check "yes" for each item on the list. If you respond "no," you may want to review current association policies and/or practices.*

<b>I. Planning</b>	<b>YES</b>	<b>NO</b>
Our association operates under a long-range strategic plan, which includes a mission statement, key issues, goals, objectives and strategies.		
Our strategic plan is regularly monitored and programs/services are developed in conjunction with the issues identified in the plan.		
Our annual budget and membership plans are tied to our strategic plan.		
An annual work plan is developed based on the strategic plan strategies.		
<b>II. Governance and Organization</b>		
We can locate our Articles of Incorporation.		
We can locate a copy of the bylaws for association.		
All members of the board of directors have a copy of the bylaws.		
Our bylaws are reviewed and updated on a regular basis.		
We have a copy of our current state association bylaws on file.		
We have a copy of the current NAHB bylaws on file.		
We have a board policy manual in which all policies of the board are recorded.		
We can locate our Proof of Tax Exemption Letter from the IRS.		
We have copies of all board meeting minutes on file, signed by the Secretary, which are maintained as a permanent record.		
Copies of our tax returns are maintained for at least seven years.		
We have original copies of our insurance policies on file.		
We have a records retention policy on file.		
A majority of the members of the Board are builder members.		
We conduct an annual board of directors/leadership orientation program.		
We have appointed one NAHB director and alternate director for every 50 builder members (or fraction thereof).		
We have appointed all the state directors to which we are entitled.		
Our board of directors meets as specified in our bylaws.		
Our association has association professional liability insurance that covers directors, officers and staff.		
Our general liability and directors and officers insurance coverage is adequate, current and reviewed annually.		
Officers, directors and committee chairs have written job descriptions.		
The path to leadership positions in our association is clear to the membership.		
The current leadership and staff seek out potential new leaders.		
Our committees meet regularly, have structured meetings and are productive.		



<b>II. Governance and Organization (continued)</b>	<b>YES</b>	<b>NO</b>
The officers of the association provide oversight of committees.		
The officers and staff understand each other's roles in the operation of the association.		
The president and executive officer meet on a regularly scheduled basis.		
The spokesperson for the association has been identified and has received proper training for the role.		
The staff and board are aware of all the IRS Form 990 requirements and the association is in compliance.		
<b>III. Human Resources</b>		
All staff has written job descriptions.		
All staff receives annual written evaluations which are based on written goals and objectives for each staff person.		
Our association has an employee handbook.		
All staff receives the training necessary to complete their tasks.		
Staff receives compensation appropriate to the size of the association and market demands.		
Staff morale is satisfactory.		
<b>IV. Membership Development</b>		
We know our association's jurisdiction and are aware of our market penetration.		
We have an active membership committee.		
We have a process for identifying potential members.		
We set membership goals each year (recruitment and retention).		
We have an annual membership development plan.		
Membership requirements and the application process are followed at all times.		
We conduct recruiter-training programs.		
We recognize recruiters through the Spike Club and other methods.		
We have an Ambassadors Club or something similar to help assimilate new members.		
We conduct new member orientations on a regular basis (at least quarterly).		
We get new members involved immediately in association activities, programs and committees.		
We profile new members for their interests and target those interests for involvement.		
We periodically evaluate our association's services and benefits to keep in tune with member needs.		
We communicate association activities and accomplishments to the general membership on a regular basis.		
We follow-up with canceled members to determine their reasons for not renewing.		

<b>V. Member Services</b>	<b>YES</b>	<b>NO</b>
We have regular general membership meetings and they are well attended.		
We publish a regular newsletter, e-newsletter or magazine that includes a calendar of events.		
We publish a member directory and/or a guide for members and consumers.		
We have a government affairs program that at least monitors local government activities and we inform the membership about developments.		
We have developed relationships with local officials and communicate with them on a regular basis.		
We have identified those members that have relationships with local officials.		
We are on the mailing list to receive all agendas and minutes of the local government agencies and bodies in our jurisdiction.		
We review all newspapers and journals within our jurisdiction in order to follow new issues that could impact the industry.		
We are involved in the local political process encouraging the election of pro- industry candidates.		
We provide educational opportunities for the membership.		
We provide opportunities for associates to network with builders.		
We have a public relations program that communicates the association's message to the media.		
We have programs that promote the industry, such as a parade of homes, home products show, consumer education programs, etc.		
<b>VI. Finances</b>		
Dues represent less than 50% of our total income.		
Our dues are adequate to support association programs once state and national dues are subtracted.		
We have a written reserve policy and are striving toward an amount in liquid reserves equal to 50% or more of our operating budget.		
Our budget is well documented and is consistent with our strategic plan.		
We have a consistent and fiscally responsible budgeting process.		
Program budgets take into account staff time and resources.		
The board receives regular, clear and concise financial statements.		
We have an annual financial review or audit conducted by a reputable outside accounting firm knowledgeable in association tax law.		
We have a written, long-term investment strategy to ensure adequate future funding.		
Applicable state and federal tax returns are filed on an annual basis.		
We require two signatures on every check.		
The executive officer (or the treasurer in single-staff associations) receives unopened bank statements and canceled checks and reviews them prior to the association's bookkeeper.		
All members and staff who handle cash are bonded.		
The supply of unused checks is kept in a locked drawer or in another safe manner.		

<b>VI. Finances (continued)</b>	<b>YES</b>	<b>NO</b>
We require competitive bids for all major purchases.		
Contracts are reviewed and signed by authorized staff and an officer.		
Our dues billing system allows enough time to collect dues prior to renewal anniversary dates.		
<b>VII. Office Space &amp; Equipment</b>		
We have office space that presents a professional image for the association and provides adequate workspace for staff and small meetings.		
Staff has the necessary software to complete their tasks and have received the training to use it.		
The association has adequate office equipment (computers, copiers)		
All membership records are computerized and backed-up/saved on a regular basis.		
All accounting records are computerized and backed-up/saved on a regular basis.		
There is more than one exit from the association's office in case of an emergency.		
There are adequate storage facilities for supplies, equipment, etc.		

What are the top three issues that you would like your Board of Directors to focus in on next year?