STRATEGIC LONG-RANGE PLAN
Revised 2017

Being indispensable to achieving prosperity in our industry
OVERVIEW

Associations operate in ever-changing environments and are continually challenged to meet the needs of their members. This uncertain environment creates a strong temptation for associations to over-react to a perceived crisis. The result can be a hodge-podge of unrelated, existing and new, updated and outdated “member benefits,” with no unifying focus or relevance to the association’s mission.

In order for associations to remain focused, yet flexible to meet changing needs they must know their purpose, clearly define their mission and establish planning systems that achieve stability while allowing for flexibility.

Association governance exists to identify and achieve the organizational mission, goals and strategic outcomes. Associations are most successful when they are driven by strategic plans that clearly define expected end-results (outcomes), using a governance structure that is sufficiently plan-focused, flexible, and depoliticized to produce those results. Today, many leading associations are turning to strategic governance to run their organizations. The American Supply Association has implemented strategic governance since 2008 with great success.

A PARTNERSHIP WITH STAFF

A critical component in strategic governance is a reliance on skilled association management professionals who are integral partners in the association’s governance process. Their work is closely integrated with those of volunteer governing bodies. Sound strategic governance relies upon their expertise and consistency of position within all four primary functions. The association chief executive officer and the senior management team are incorporated into all aspects of scanning, planning, oversight and adjustment activities. In short, staff is heavily relied upon to develop information for the association’s leadership knowledge based decision making, provide advice and counsel in the areas of their expertise, coordinate the work of the governing body and are accountable for the results of the organization. They are an integral partner in the process.

Understanding this, at the American Supply Association Winter Board Meeting in 2008 in St. Petersburg, Florida, the association’s leadership made a departure from how it previously governed and planned the future of the association toward the new process of strategic governance including both staff and volunteer leaders in the process. Getting the process going, the officers of the association invited all board and committee members as well as its past Chairmen (nearly 70 people in total) to participate in a two-day long strategic planning effort. Each year since then, the association’s leadership conducts annual strategic planning retreats to look and map out plans to continue to drive ASA’s leadership and value far into the horizon. This is done with an eye toward how the association could impact the future of our industry to ensure that our members will remain relevant and thrive.

Very few associations have successfully pulled off bringing over seventy opinionated individuals into a planning session and walk away united in purpose and thought. Not only has the association pulled that off but it’s what’s driving ASA today!

Today, our winter board meetings are virtual long-range strategic planning sessions that set the direction our leadership wants to take the industry; evaluating our assumptions about the future and revising our plan to keep ASA focused on our long range goals all working together.
ASA’s strategic planning process and the results from it have enabled the association to come a very long way toward building the brand of ASA throughout the industry. Today, based on feedback from surveys, ASA is once again looked to as the leader of the industry; especially in the areas of advocacy, education, workforce recruitment and business intelligence. Refocusing association resources away from non-traditional roles back to what is important to our core programming while streamlining our operating budget has given ASA the ability to deliver quality in the areas that matter most. This is core to the association’s relevance moving forward.

It is through this strategic governance process that ASA has radically expanded its value proposition to include economic forecasting programs, full time recognized advocacy efforts in Washington, expanding our leadership into the codes & standards arena, robust and comprehensive educational programs delivered to employees in a relevant and cost effective way, peer networking programs that engage all segments of a members operation, employee recruitment solutions and building the association brand as well as the brand of our members with industry customer groups.

BUILDING OUR PLAN

The American Supply Association has developed the following strategic long-range plan, most recently revised in February 2017, that describes a desired vision and what will be essential to achieving that vision. It is grounded in core ideology and driven by an envisioned future that realizes the full potential of ASA’s ability to support its stakeholders. ASA’s commitments are articulated in goals that declare the outcomes or attributes the organization intends to achieve. Objectives represent key metrics affecting ASA’s ability to achieve the goal and articulate the direction in which these issues must be moved. Strategies will describe how ASA and its leadership plan to commit its limited resources to make its vision a reality meeting the needs of a constantly changing professional environment. Therefore, underlying this plan is the adoption of an ongoing process of planning and thinking strategically, designed to ensure relevance of direction and action over time.

In developing this strategic plan, a framework for planning was utilized, based on a model that organizes conversations about the future into four distinct planning “horizons;” prioritizing and executing outcomes as well as ensuring relevance of an organization’s long-range direction over time.

Envisioned future. The “four planning horizons” framework consists of crafting a comprehensive strategic direction based on the balance of what doesn’t change – the timeless principles of the organization’s core purpose and core values (core ideology) – and what the organization seeks to become within a 10 to 30 year horizon – what would be possible beyond the constraints of the current environment. The 10 to 30 year horizon is characterized by the articulation of an envisioned future – a BAG (big audacious goal) – and a vivid description – what it will be like to achieve the goal.

Critical factors. The articulation of the envisioned future guides the organization as it considers the factors that will affect its ability to achieve its goals. Building foresight about the 5 to 10 year horizons – assumptions, opportunities, and critical uncertainties in the likely relevant future as well as emerging strategic mega-issues—suggests critical choices about the potential barriers the organization will face. This foresight also suggests the responses the organization will need to consider in navigating its way toward achievement of its 10 to 30 year goal, or BAG.
**Strategic plan and operational planning.** The linkage continues into the 3 to 5 year horizon through the development of a formal long-range strategic plan, in which the organization articulates the outcomes it seeks to achieve for its stakeholders. How will the world be different as a result of what the organization does? Who will benefit and what will the likely results be? Further, the articulation of strategies will bring focus to ASA’s annual operational allocation of discretionary resources. Action plans, checkpoints, and milestones will be developed through a process of operational planning meetings and committee meetings, indicating ASA’s progress toward each goal in every planning year.

A strategic long-range plan is not intended as a substitute for an annual program or operating plan. It does not detail all the initiatives, programs, and activities the organization will undertake in the course of serving its membership and the industry, nor can it foresee changes to the underlying assumptions on which key strategic choices were based. Instead, the strategic plan identifies what the Association is not doing today, but must be doing in the future to be successful. Consequently, the strategic plan implies change – doing new things or doing more or less of current activities to ensure successful outcomes.

**Ongoing Re-evaluation.** Strategic planning for the association should become the methodology for the organization’s operations. If it is successful, this process will not have yielded a plan to be placed on the shelf, but will have served as a catalyst for the “process of planning strategically,” at all times and at all levels throughout the organization. In order to achieve its vision, the association must not look at strategic long-range planning as a one-time project that produces a milestone document of its best thinking at the moment. Instead, the association must adopt strategic planning as an operational philosophy of ongoing re-evaluation of the critical knowledge bases that form the framework of its world, including:

- Sensitivity to member needs, insight into the future environment of the industry,
- Understanding of the capacity and strategic position of the organization, and
- Effective analysis of the ethical implications of policy and program choices.

ASA’s strategic long-range plan represents a compass the organization will use to guide its work over the short and long term. Each year of its life, the plan will be updated based on experience or new circumstances or as new opportunities or challenges emerge.
10-30 YEAR PLANNING HORIZON
CORE IDEOLOGY & ENVISIONED FUTURE

Core ideology describes an organization’s consistent identity that transcends all changes related to its relevant environment. Core ideology consists of two notions: core purpose – the organization’s reason for being – and core values – essential and enduring principles that guide an organization.

Envisioned future conveys a concrete, but yet unrealized, vision for the organization. It consists of a big audacious goal – a clear and compelling catalyst that serves as a focal point for effort – and a vivid description – vibrant and engaging descriptions of what it will be like to achieve the big audacious goal.

CORE PURPOSE OF ASA

To advance the success of the PHCP and PVF supply chain industry.

CORE VALUES OF ASA

**Integrity:** Evidenced by ethical, proper and responsible representation of the values, interests, and expectations of our member companies.

**Relevance:** Evidenced by policies, products, and services that are in step with our members’ needs and result in added value relevant to our customers and beneficial to our industry.

**Fairness:** Evidenced by representation of all industry segments, accessibility, constructive dialogue, communication without fear of reprisal, and an open and enjoyable environment characteristic of an industry united by common interests.

**Leadership:** Evidenced by commitment to excellence, adaptability, and continuous improvement that advances and enhances the industry and ASA members.
ENVISIONED FUTURE

ASA’S BIG AUDACIOUS GOAL:

“Be indispensable to achieving prosperity in our industry.”

VIVID DESCRIPTIONS

» ASA will provide value and relevance across the broad spectrum of members. Success for the association will mean increased membership, participation and involvement, and the most important, profitability.

» ASA will offer education and industry input that every distributor will consider essential to running a successful business in the industry. ASA will be recognized as the single/indisputable resource for industry education. Every industry participant and every employee at every industry partner company will recognize ASA education programs.

» ASA will be respected as the leader in representing and organizing the industry under a national arm. Every industry participant will support and participate in ASA advocacy efforts, and ASA will be seen as a leader in promoting the interests of the industry in legislative and regulatory affairs nationally and regionally.

» Success will happen when ASA becomes a “must belong” association for wholesalers, vendors and reps. Every industry participant will actively participate in all ASA networking events. Every industry participant will view ASA membership and participation as a critical part of its future business strategy.

» Members will find value in ASA information and resources. They will view them as vital to the prosperity of their companies, and unique to ASA - not available from any other venue.

» Every industry participant will utilize and participate in ASA benchmarking. There will be relevant data and statistics on the PHCP industry.

» ASA members will be more profitable and sustainable as they deliver world-class supply chain efficiency in a changing marketplace.
3-5 YEAR PLANNING HORIZON
OUTCOME-ORIENTED GOALS

ASA’s Goals are outcome-oriented statements that represent what will constitute the association’s future success. The achievement of each goal will move ASA towards the realization of its mega vision. At its latest Winter Leadership meeting, the volunteer leaders and staff refocused its thinking to identify a more concise action plan with more clearly defined goals, strategies and tactics. Over the next few pages, the results of their strategic planning are laid out with the following four mega goals. They are:

OPERATIONAL EXCELLENCE GOAL
ASA members will be more profitable by exceeding our customer’s expectations with world class distribution and operational performance.

EMPLOYEE RECRUITMENT & EDUCATION GOAL
ASA members will attract, develop, and retain a labor force that will become the best educated, best trained and most professional in the industry.

ADVOCACY GOAL
ASA will be the unified and recognized leading voice of the stakeholders within the PHCP/PVF industry to the federal, state and local governments and regulatory agencies.

EMBRACING THE FUTURE GOAL
ASA’s members will recognize and understand the forces of change in the future.
MEGA GOAL #1
OPERATIONAL EXCELLENCE

ASA members will be more profitable by exceeding our customer’s expectations with world class distribution and operational performance.

OBJECTIVE 1

Provide ASA members with relevant business intelligence that drives innovation and operational performance excellence.

Strategy A: Identify/research industries that currently provide best in class distribution logistics/ intelligence for their industries and identify how best to expand value of ASA offerings.

Tactic 1: Observe/investigate best practices being used by other industries and share those practices with ASA members.

Tactic 2: Add to current offerings of business intelligence tools.

Tactic 3: Define/identify the most relevant key performance indicators to collect and build on the top 10 most requested.

Strategy B: Deploy the resources necessary to lead the efforts to study, drive participation and increase value of business intelligence.

OBJECTIVE 2

Provide ASA members with education on the trends in national, state and local codes that will impact their business.

Strategy A: Build ASA’s recognition as a leading voice in the codes and standards arena through engagement with allied organizations.

Tactic 1: Build a strong committee and support team to expand ASA’s code and standards operation.

Tactic 2: Join key code groups and liaise with allied organizations to advocate ASA issues.

Strategy B: Provide educational forums, articles and webinars on key code items through all ASA communication outlets.
OBJECTIVE 3

ASA members will help their customers be more prosperous.

Strategy A: Build relationships with staff and volunteer leaders of key customer groups.
   Tactic 1: Build robust and consistent communications with key customer groups.

Strategy B: ASA will strive to build member brand with other industry associations.
   Tactic 1: Develop relationships with key customer groups using ASA University materials.
   Tactic 2: Promote regional meeting with participation of all key customer groups.

Strategy C: Implement programs that build partnerships with customer groups that enhance relationships.

OBJECTIVE 4

ASA members will be on the leading edge of leveraging and utilizing technology to get/stay closer to their customers.

Strategy A: ASA will provide members with the tools/ability/education to implement technology that will connect them to industry customers.
   Tactic 1: Research and analyze trends.
   Tactic 2: Determine the best practices that service members, providers and peer networking counsels on what people are doing and what is working best.
   Tactic 3: Educate members on trends in technology at annual events, Network and other forums.
MEGA GOAL #2
EMPLOYEE RECRUITMENT & EDUCATION

ASA members will attract, develop, and retain a labor force that will become the best educated, best trained, and most professional in the industry.

OBJECTIVE 1

Increase the number of talented workers taking advantage of attractive career opportunities in the PHCP/PVF Industry.

Strategy A: Implement an impactful national awareness campaign about our industry & member companies.

  Tactic 1: Conduct a comprehensive PR marketing campaign, including the use of email and social media, to high schools, colleges/ universities & military.

  Tactic 2: Create professional videos that highlight the exciting (unique) opportunities that exist in our industry and distribute via an aggressive PR campaign through social media outlets such as, YouTube.

  Tactic 3: Engage members to become advocates for career advocacy in their markets.

    Action 1: Aggressively ask our members to engage in their local high schools and colleges.

    Action 2: Study the feasibility of hiring a full time team member to expand our career outreach efforts.

Strategy B: Engage member participation with “ACE” (Architecture, Construction & Engineering) programs.

  Tactic 1: ASA to identify ACE programs that exist nationally and provide greater details to highlight the value that these programs offer as a source for recruitment.

  Tactic 2: Enlist member support/sponsorship in each ACE program.

  Tactic 3: Promote support of member engagement/success in ACE to our industry.

OBJECTIVE 2

Members’ workforce has the skills and knowledge to effectively perform their roles in all aspects of the business model.

Strategy A: Build recognition that ASA University is the standard by which employees are measured.

  Tactic 1: Define and promote Industry Standards through case studies and recognition of companies with employees completing the programs.

  Tactic 2: Drive higher levels of leadership by expanding completion of the MDM program.

  Tactic 3: Issue role-based certifications/badges.
Tactic 4: Revise ASA OPR to include training data points to evaluate correlation of training to financial performance and employee retention.

Strategy B: ASA University is the resource for learning management solutions.

Tactic 1: Engage in novel content delivery methods to ensure value and relevance over time.

Tactic 2: Develop high quality proprietary content with regular updates of content and expand product offerings to include manufacturer training, HR Practices, Product Knowledge on HVAC, Electrical, Water Works, Safety, etc.

Tactic 3: Offer members a portal for centralized reporting.

Tactic 4: Increase the marketing of ASA University and expand the audiences to include industry members not currently using the products.

OBJECTIVE 3

Support members in creating a culture of Talent Management.

Strategy A: Communicate the value of ongoing employee development to the membership.

Tactic 1: Provide resources and support to help members establish a Culture of Learning within their companies.

Tactic 2: Develop and provide a resource to assist members with their employee Succession Planning process.

Tactic 3: Provide best practices and resources for recruitment to enable movement of high potential individuals.

Tactic 4: Provide performance management support to the membership.

Tactic 5: Assist members in the use of available recourses; expand Advisory Service staff and capabilities

Strategy B: Assist members in becoming “Industry of Choice” for increased employee retention.

Tactic 1: Develop and provide a resource to assist members in measuring and improving employee engagement.

Tactic 2: Develop and provide resources to assist members with training recognition, incentives, and rewards.

Tactic 3: Assist members in the use of available resources; expand Advisory Service staff and capabilities.

Tactic 4: Raise awareness of the importance of employee retention and recognition to members and promote continual training of the workforce as a tool for retention.

Tactic 5: Change management capabilities.
MEGA GOAL #3
ADVOCACY

ASA will be the unified and recognized leading voice of all the stakeholders within the PHCP/PVF industry to the federal, state, and local governments and regulatory agencies.

OBJECTIVE 1

ASA will expand its leadership voice and influence with government, industry and customer groups.

Strategy A: Engage buying groups and national wholesale members in the ASA advocacy process through formal meetings with elected officials.

Tactic 1: Facilitate buying group and national wholesaler (Hill visit) meetings in Washington.

Tactic 2: Provide editorial/educational materials for buying group and national distributor newsletters and magazines while expanding our messaging to include a more personal, one on one, experience.

Tactic 3: Increase awareness and exposure through social media.

Tactic 4: Encourage members to write letters to elected officials and participate in advocacy efforts.

Tactic 5: Encourage participation of Distributors on the Codes and Standards Committee.

Tactic 6: Align with PHCC, NKBA and other organizations to have a bigger voice.

Strategy B: Educate elected officials and candidates on the importance our industry plays in the nation’s infrastructure and health of residents.

Tactic 1: Promote educational events between members and elected officials/candidates through visits to member facilities.

Tactic 2: Conduct educational/advocacy visits between members and elected officials at the national/local level.

Tactic 3: Place articles/ads in publications widely viewed by elected leaders and their staff.

Tactic 4: Attend government conference/conventions (Subject matter sessions/booth).

Tactic 5: Communicate coalition membership opportunities and participation.

Tactic 6: Create a database with key contacts of executives that have relationships with elected officials.
OBJECTIVE 2

ASA will present consistent and meaningful communication of association positions, priorities and advantages to key audiences including members, potential members, government and customer groups.

**Strategy A:** Expand the distribution of Outlook publications to include government code groups/individuals, and other end users.

- **Tactic 1:** Add codes and standards content in Outlook issues on a consistent basis.
- **Tactic 2:** Submit editorial content to key targeted audience publications.
- **Tactic 3:** Issue press releases and op-ed content to customer publications on relevant issues.
- **Tactic 4:** Increase presence and exposure on social media.
- **Tactic 5:** Measure and report on the success of communication.

OBJECTIVE 3

ASA and its members will be leading voices for safe drinking water and for modernization of North America’s water, gas and sewage infrastructure.

OBJECTIVE 4

ASA will promote the most efficient environmentally prudent footprint (utilizing limited resources and recycling waste materials) generated by our industry.
MEGA GOAL #4
EMBRACING THE FUTURE

ASA’s members will recognize and understand the forces of change in the future.

OBJECTIVE 1

ASA will foster change management.

Strategy A: Help members lead change management programs with resources, tool kits and best practices.

  Tactic 1: Create tool kits based on member survey.
  Tactic 2: Provide editorials/articles on how to disrupt/change/innovate in an entrenched operation.
  Tactic 3: Offer seminars, panel discussions and other in-person educational sessions.

OBJECTIVE 2

ASA will assist members in technology.

Strategy A: Educate our members to embrace and utilize today’s technology as well as future technology to improve performance.

  Tactic 1: Break out sessions at network, as well as, webinars throughout the year.
  Tactic 2: ASA to provide editorial content in ASA media outlets (ASA News, Insights, etc.)

OBJECTIVE 3

ASA will understand changing needs and trends of customers.

Strategy A: Creating an industry to compete with the online landscape of non-traditional competitors.

  Tactic 1: Leverage all resources at ASA member’s disposal to include email, website, ASA University and regional and network meetings and divisions (Young Executives, Women in Industry, Industrial Piping and Plumbing) and councils.
  Tactic 2: Create tool kits for members to facilitate activities, such as change management, engaging technology, reaching and meeting customer needs.
  Tactic 3: Offer panel/workshops at ASA venues on technology, change management and customer trends.