



# Strategic Outlook

A high-level overview of key insights and strategic direction based on May 2026 executive survey and subsequent board strategy review.

# The AEC Mission

Members of the Association Executives Council (AEC) represent contractor members of local and state Plumbing Heating Cooling Contractor Associations (PHCC). We champion excellence and innovation in the HVAC & Plumbing Industries. We are dedicated to serving our members by fostering collaboration, advancing industry standards, and advocating for sustainable and high-quality solutions. Our commitment to professional development, ethical business practices, and environmental stewardship drives us to elevate the industry, benefiting our members, their customers, and the communities we serve."

# Survey Key Themes



## Member Burnout and Isolation are Real Concerns

Survey feedback and discussion reflected that many executives feel stretched, isolated, or unsure where to turn for help.



## AEC Needs a Centralized Resource Hub

Members want easier access to templates, playbooks, education recordings, member benefit examples, partner programs, and successful state initiatives.



## Peer-to-Peer Connection May be AEC's Strongest Value

The importance of executives learning from one another was evident, repeated throughout multiple survey areas.



## Education Should Be More Accessible and Practical

Members may not always attend live education sessions, but there is still a need for meaningful, issue-based learning.



## New Member Onboarding Needs Improvement

There was concern that new executives may not always feel welcomed or may not understand what resources are available to help them in their new role.

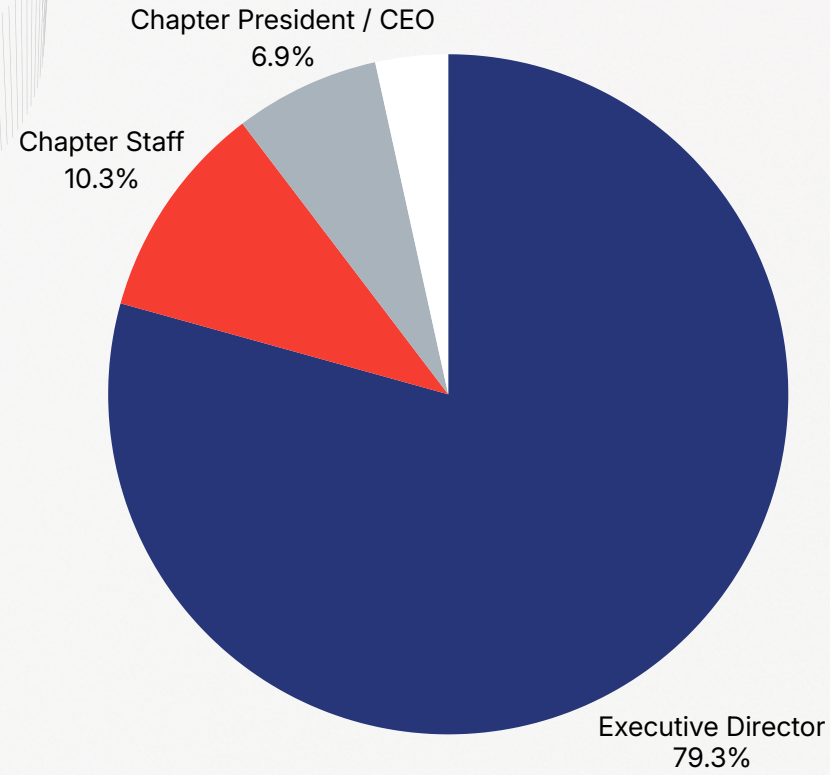


## AEC's Role with National Should Be More Clearly Defined

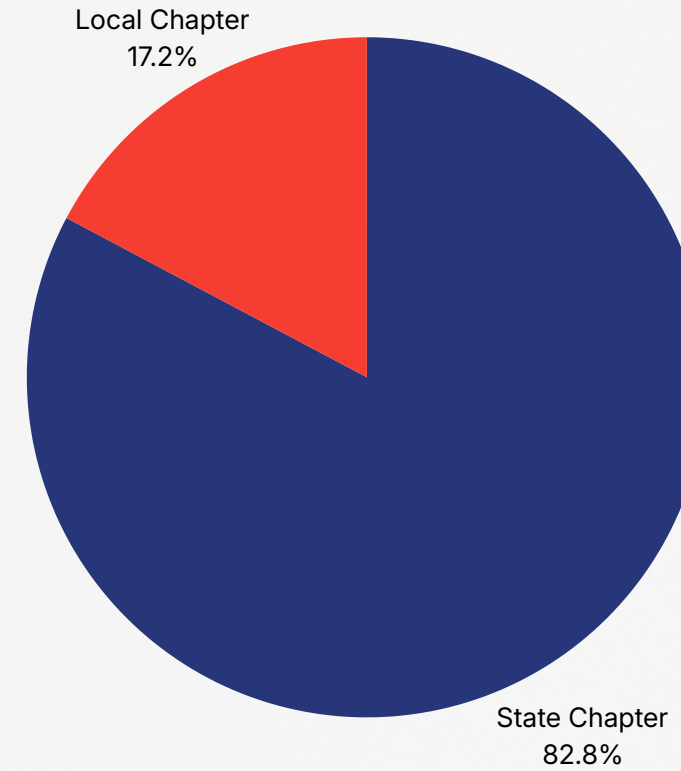
AEC needs to clarify its own mission, including how it supports executives, communicates needs to National, shares National updates with members, and serves as a liaison for chapter-level concerns.

# Survey Detailed Overview

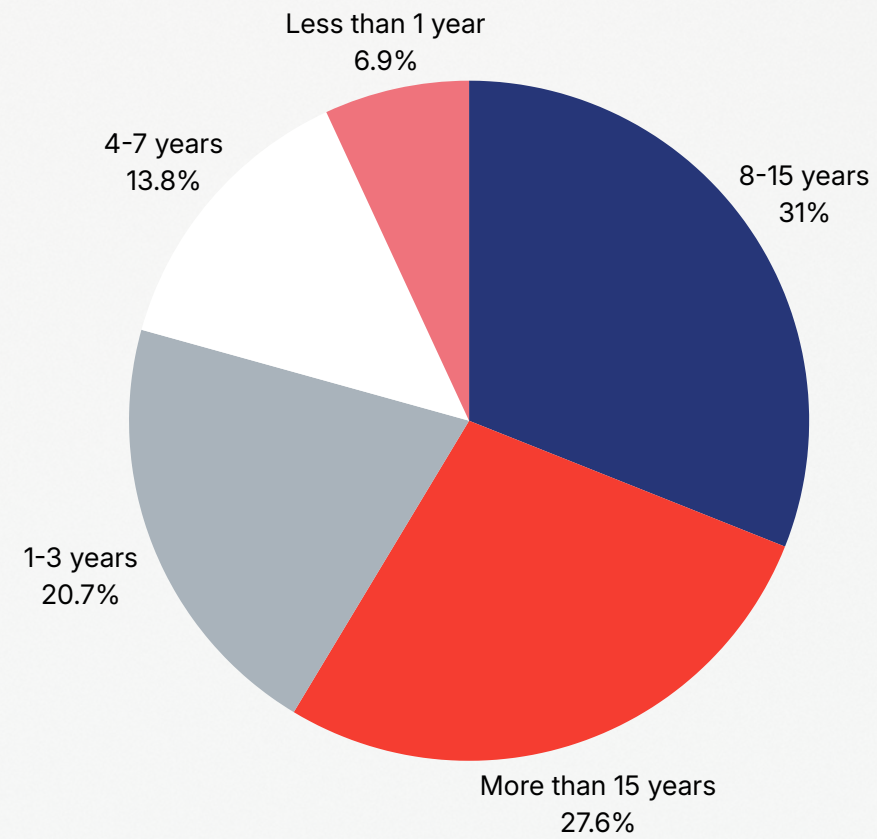
## Respondent Role



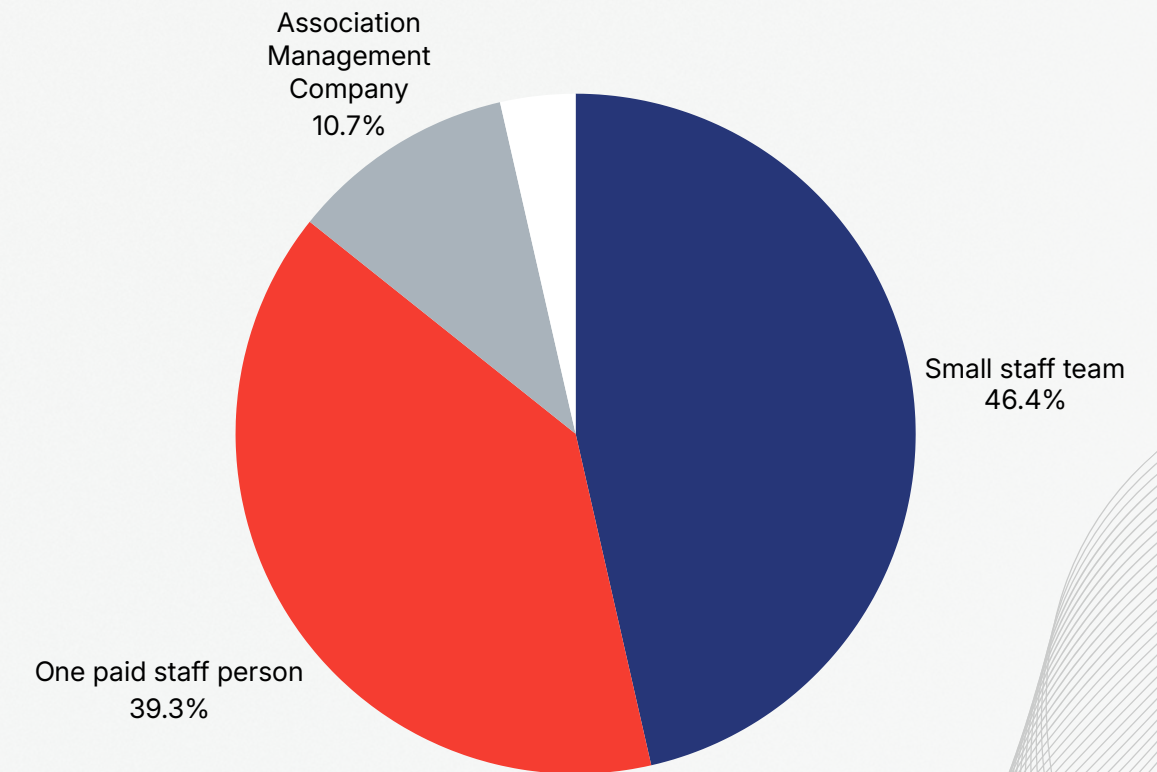
## Chapter Type



## Years in Role

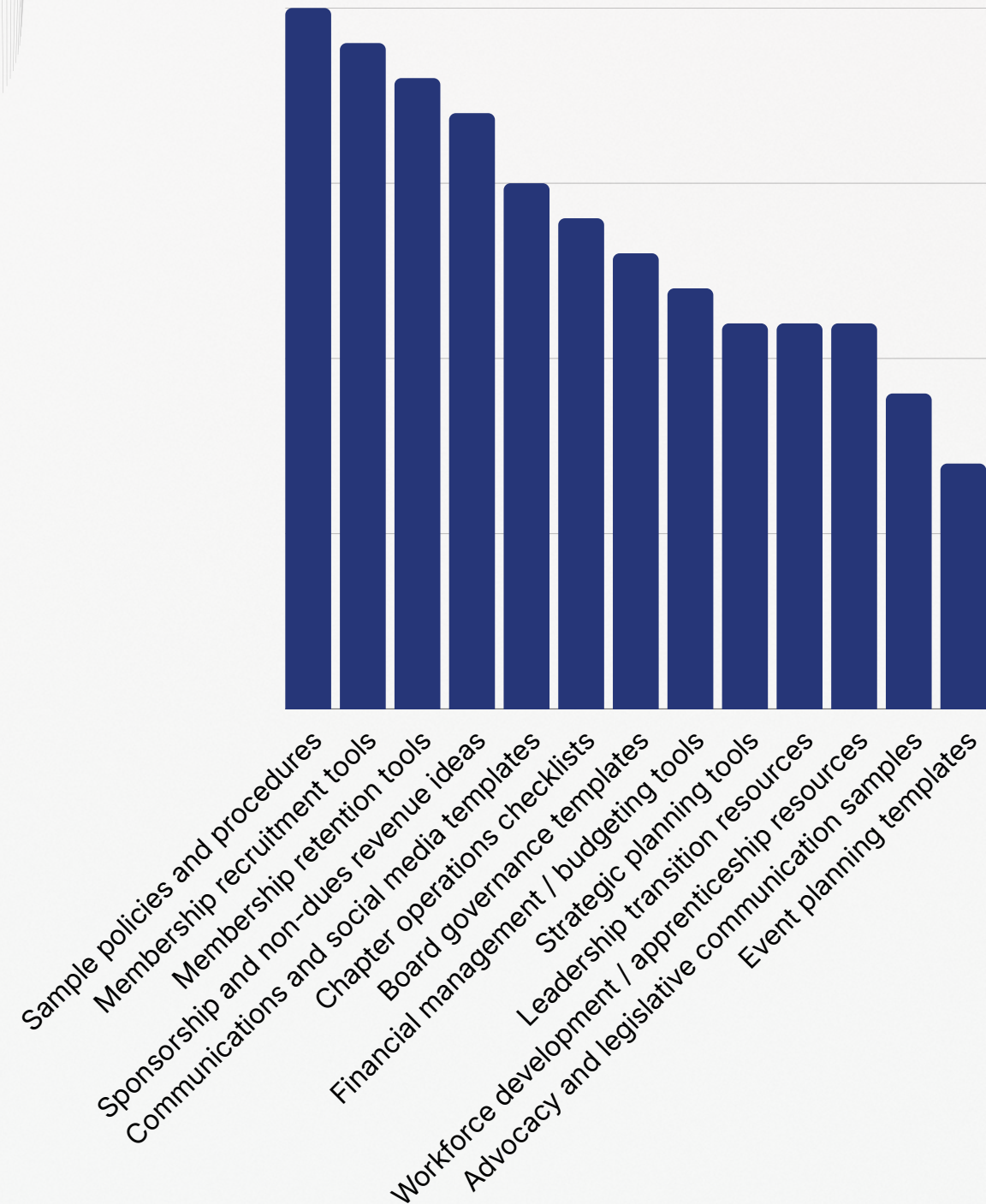


## Staff Structure

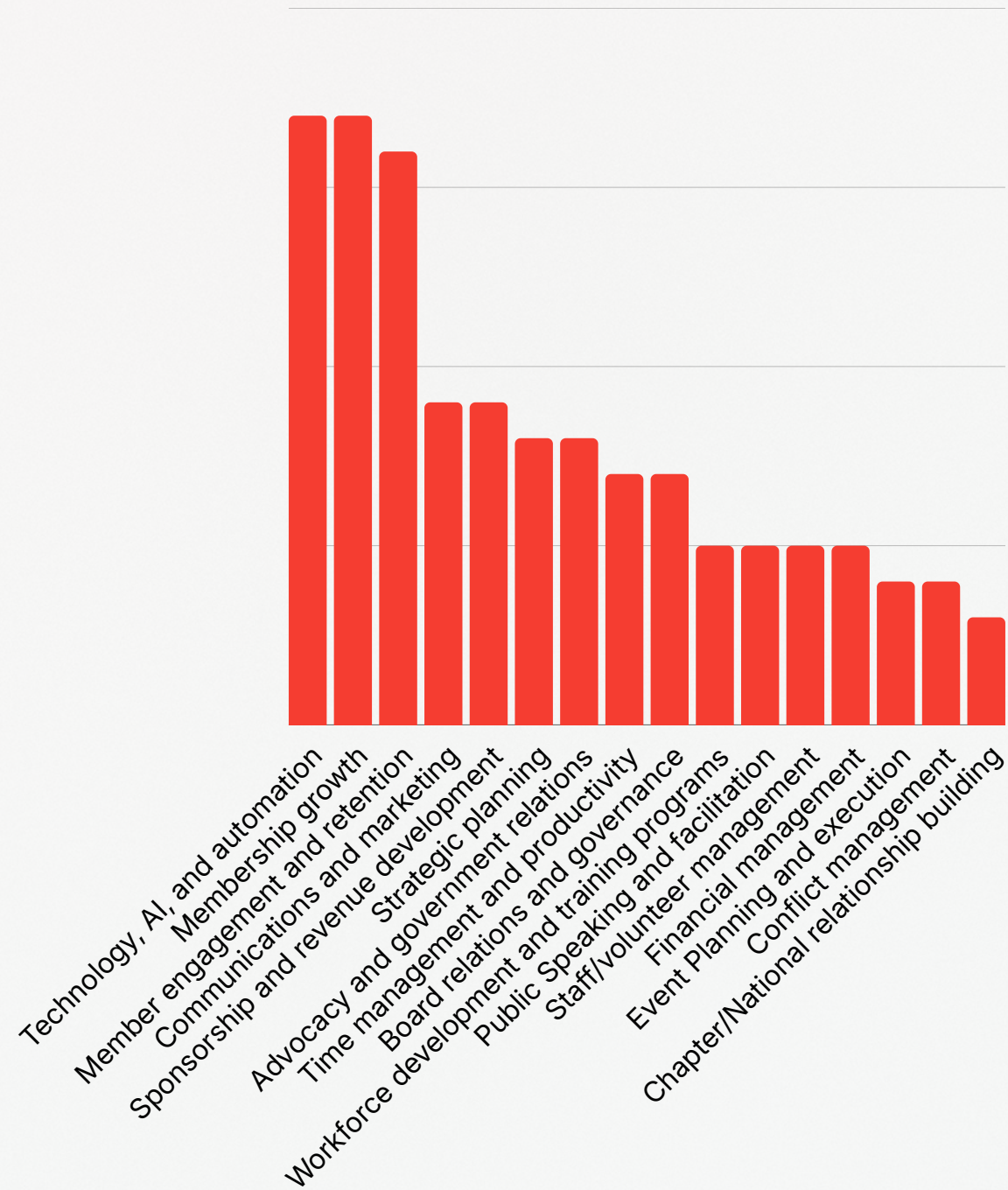


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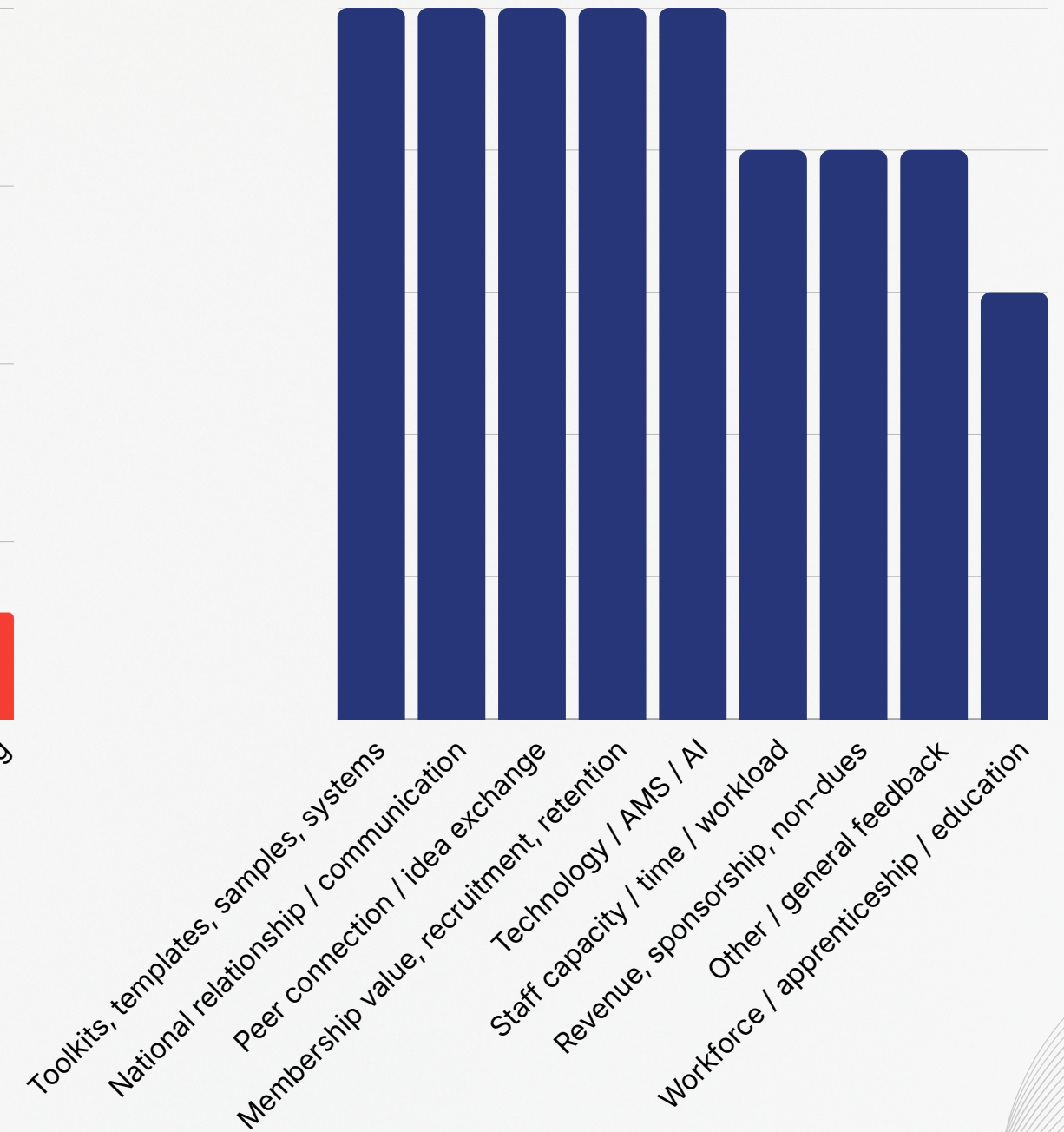
## Most Helpful AEC Resources



## Resource Growth Areas

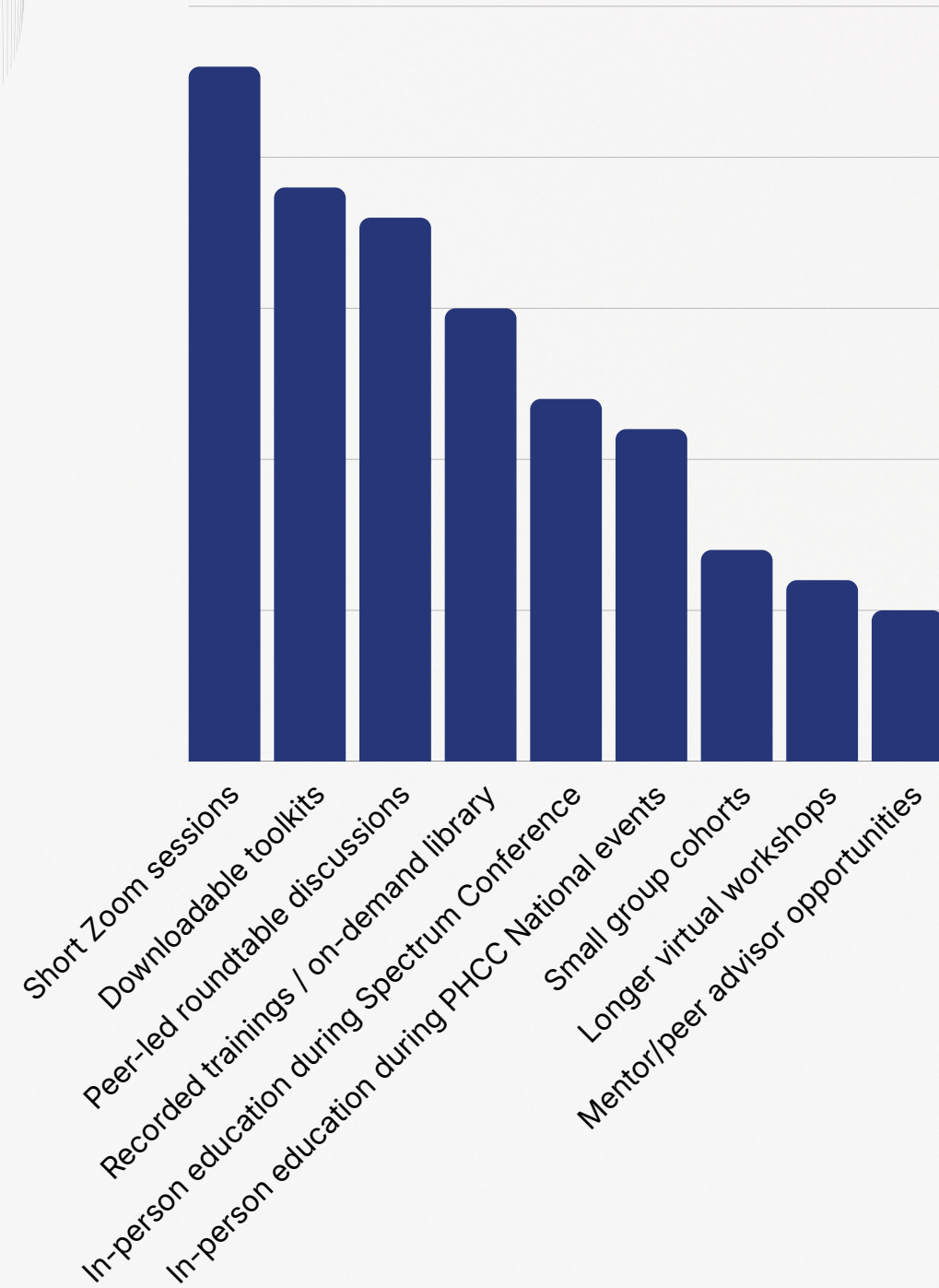


## Resources Wanted Now (Open Ended Summary)

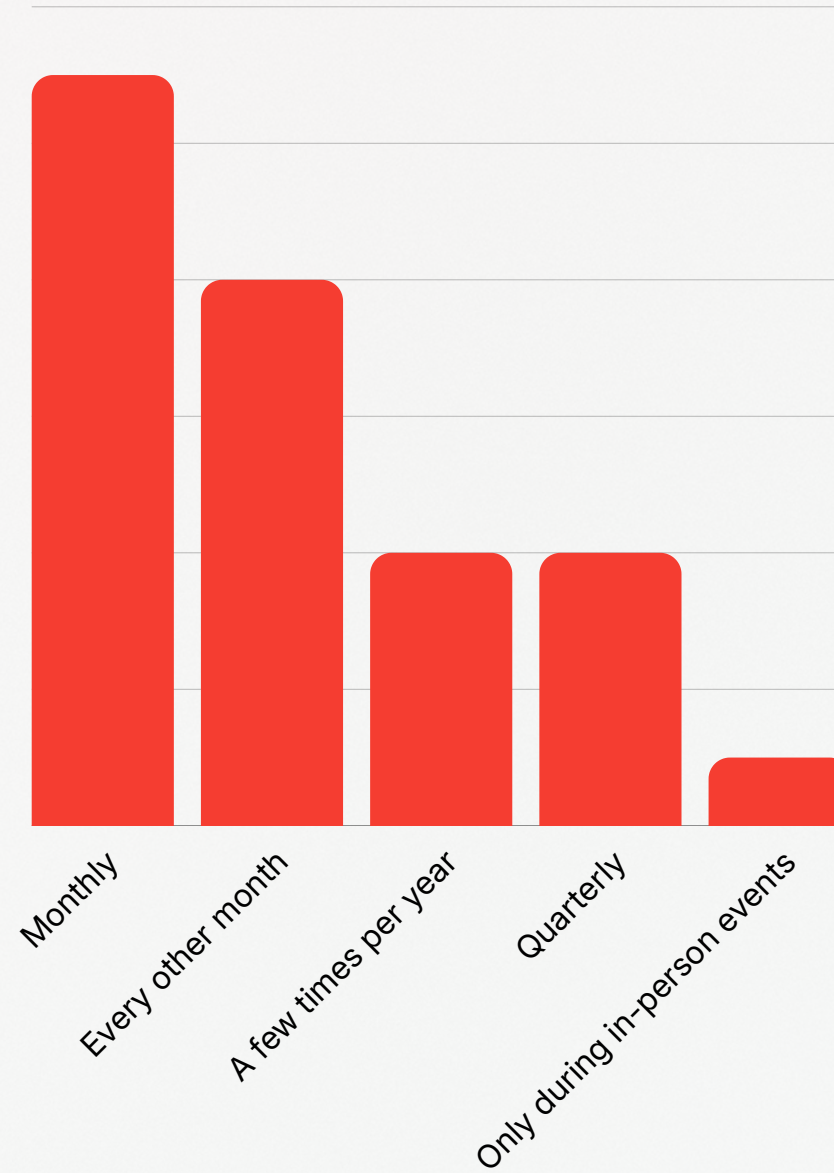


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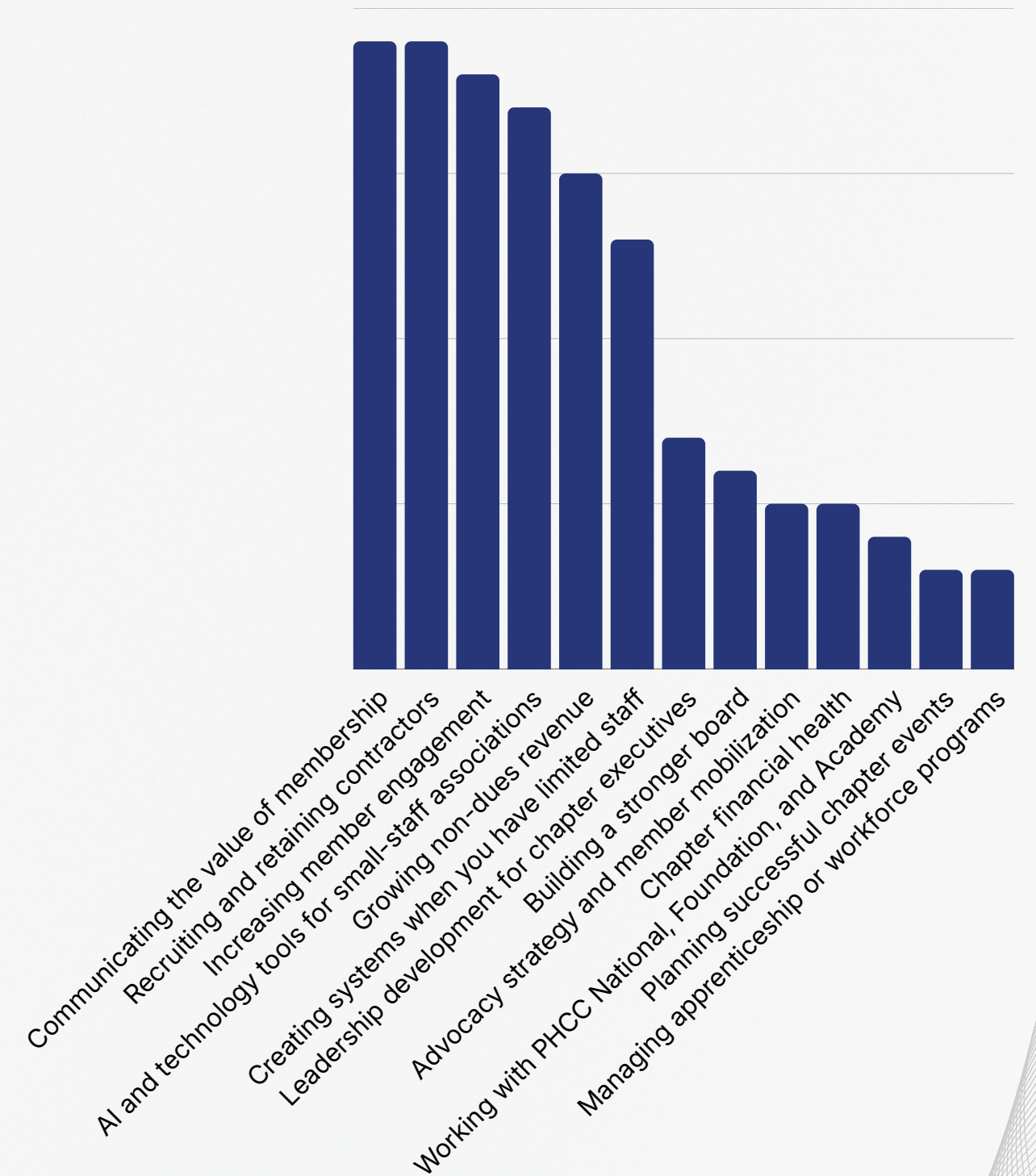
## Useful Education Formats



## Realistic Participation Frequency

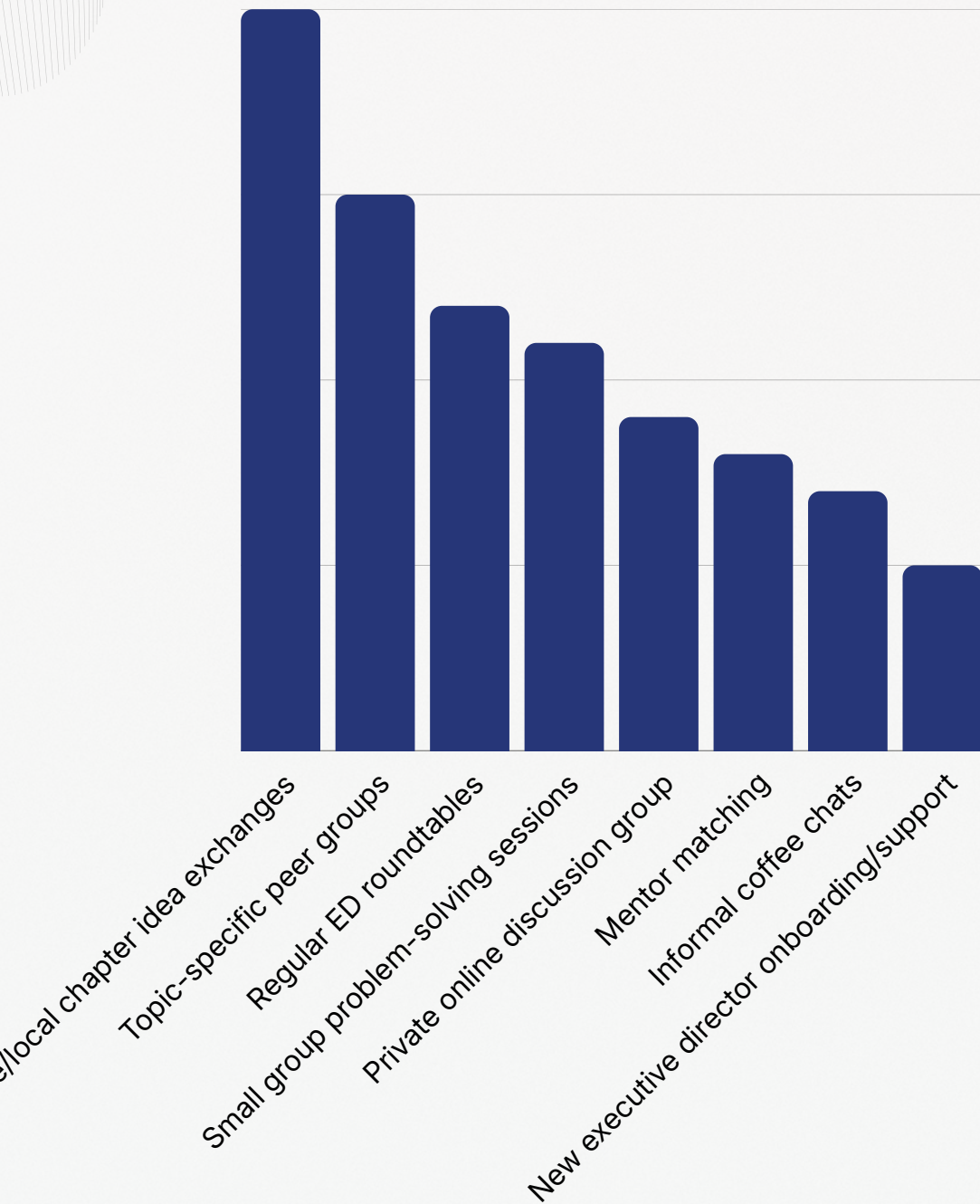


## Education Topic Priorities

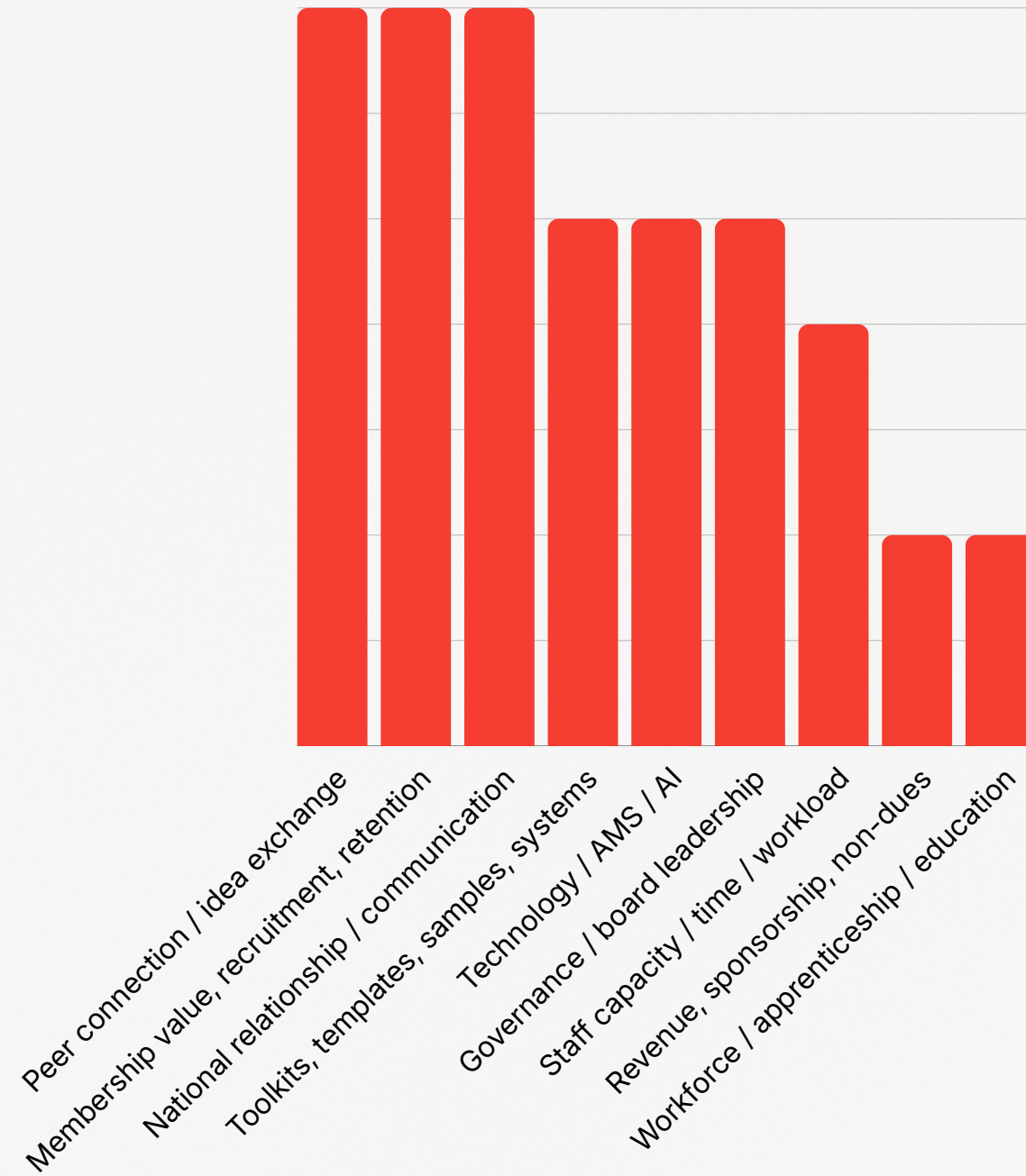


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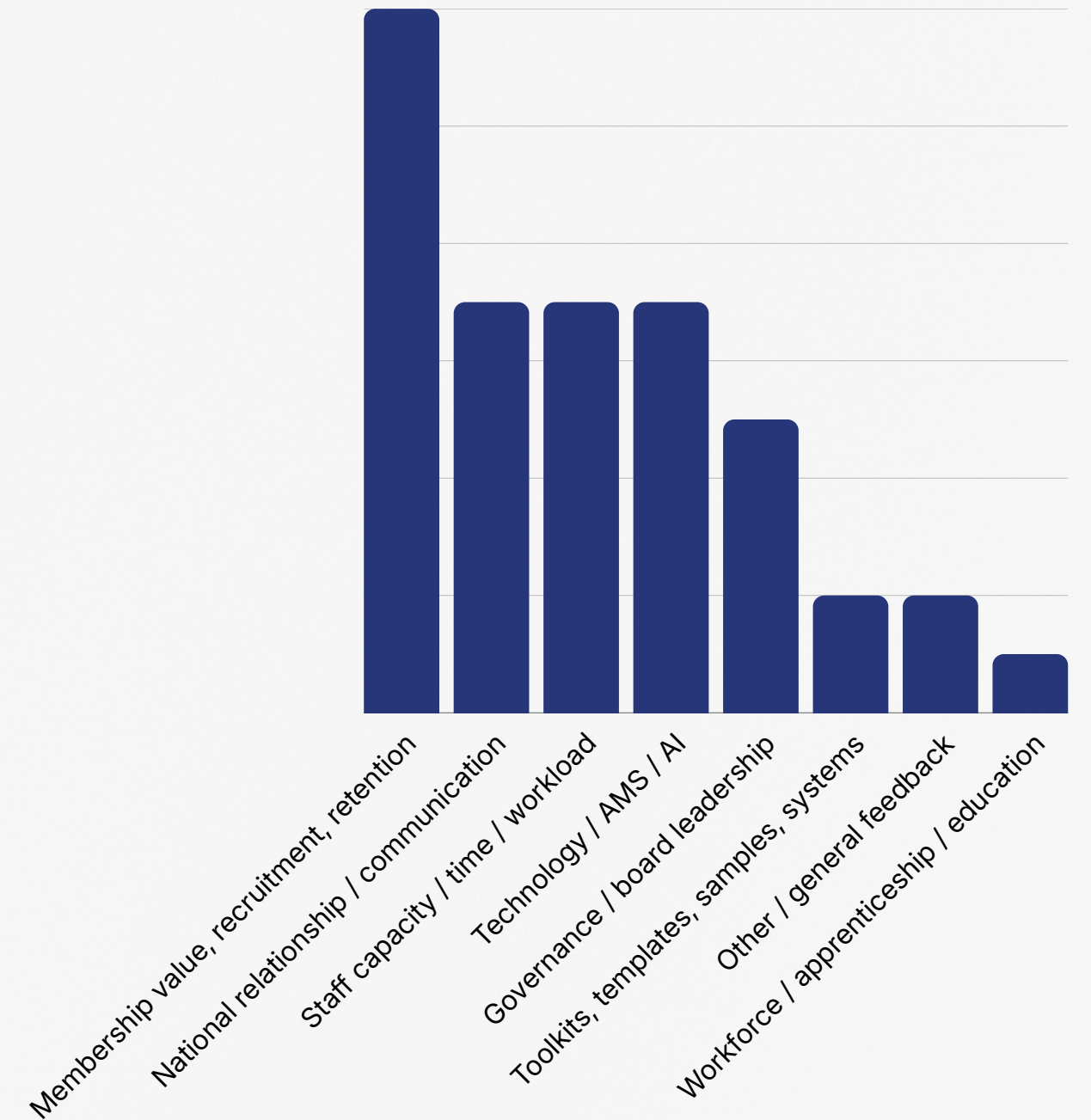
## Valuable Peer Connection Opportunities



## What Would Feel Supportive (Open Ended Summary)



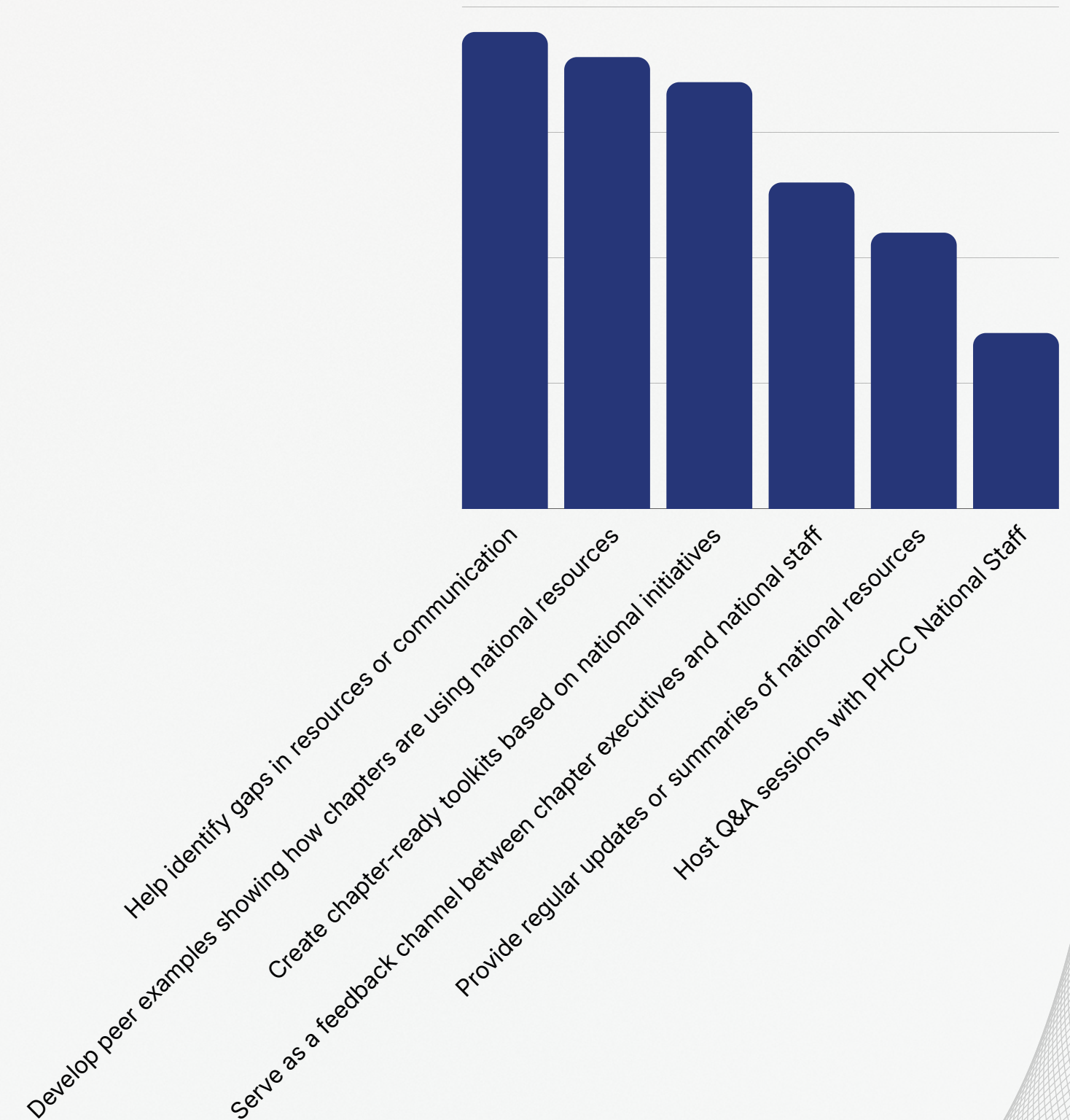
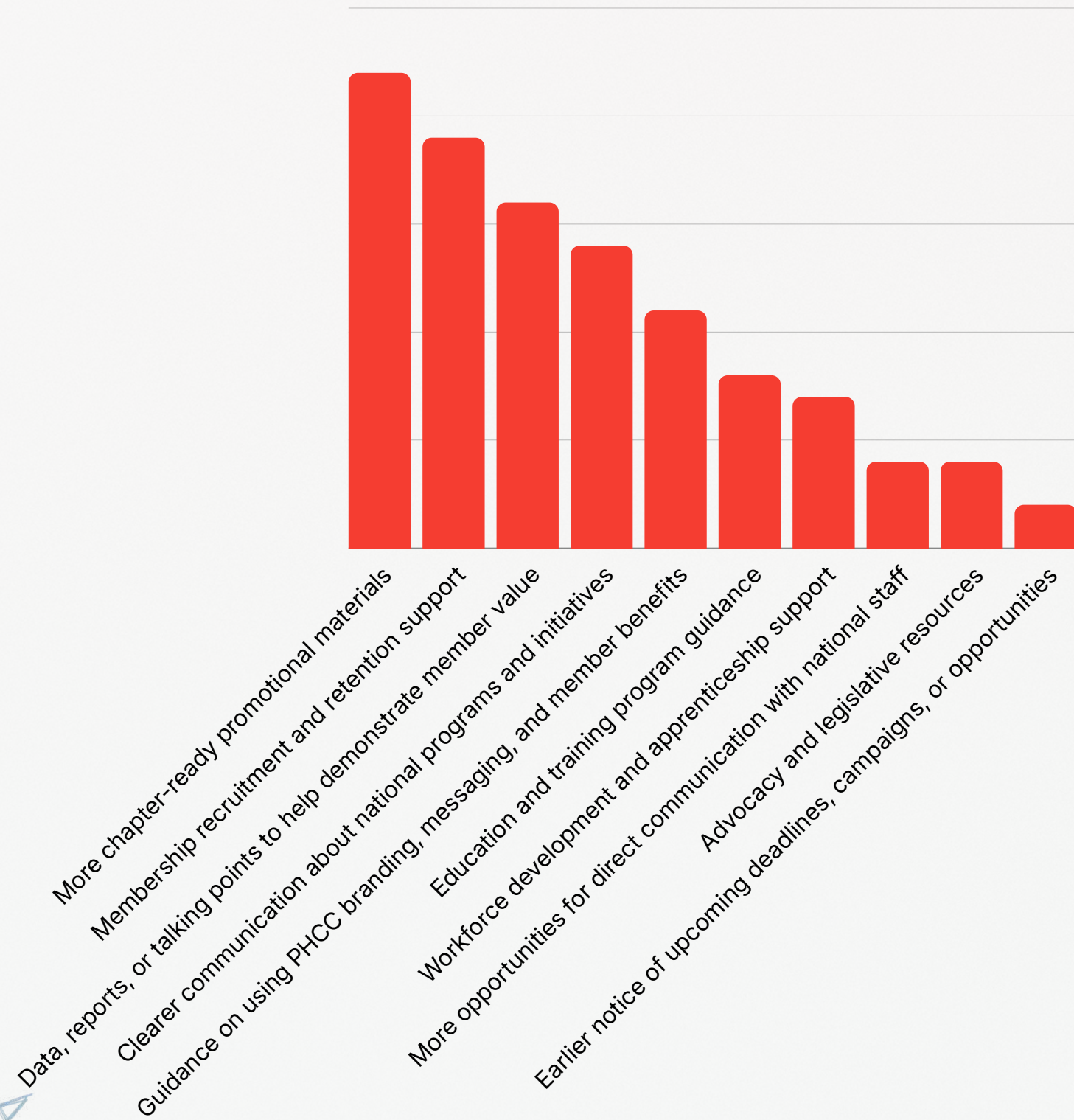
## Biggest Challenge (Open Ended Summary)



# Survey Detailed Overview

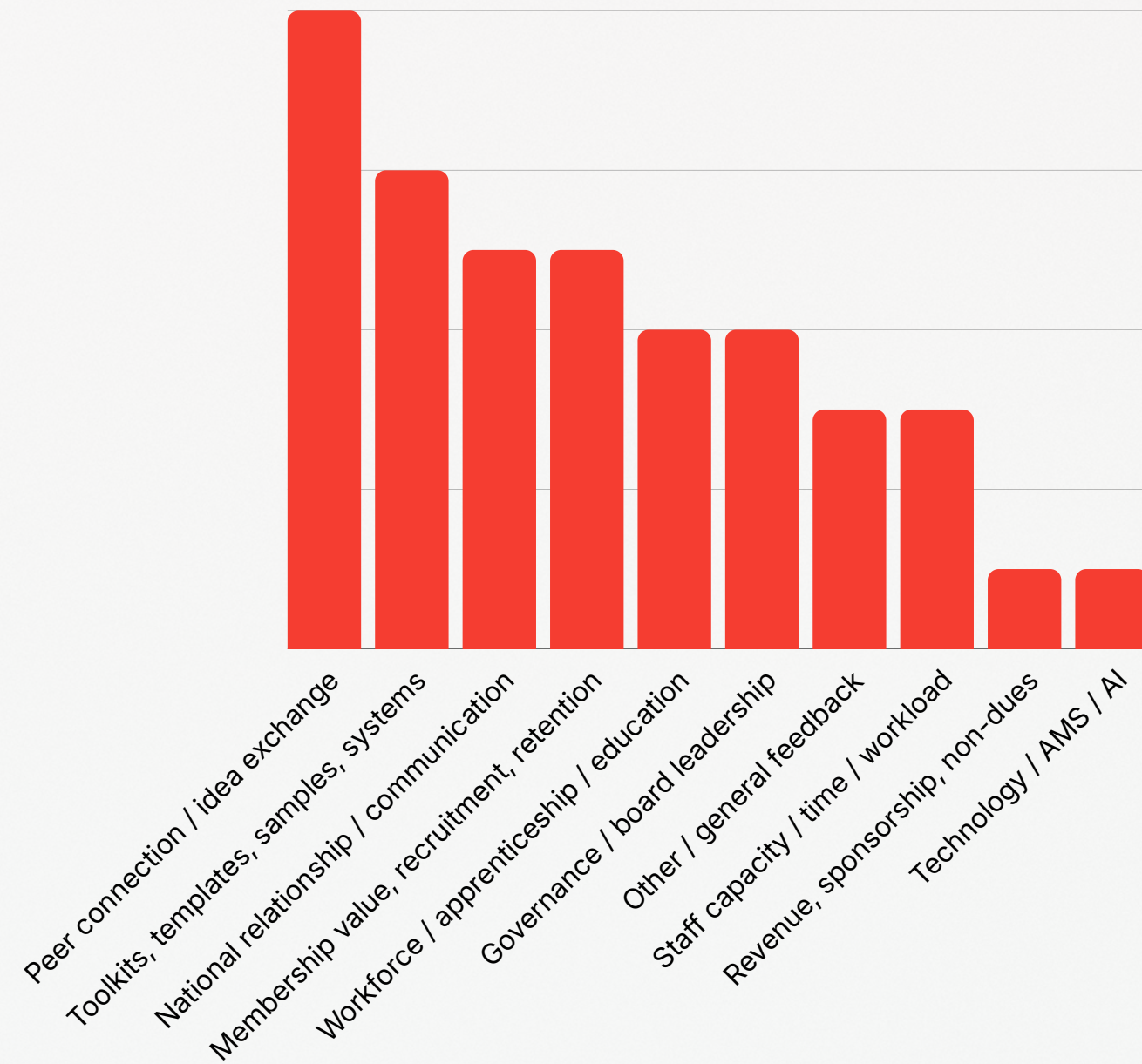
## Needed Support From PHCC National Staff

## AEC Role with PHCC National Resources

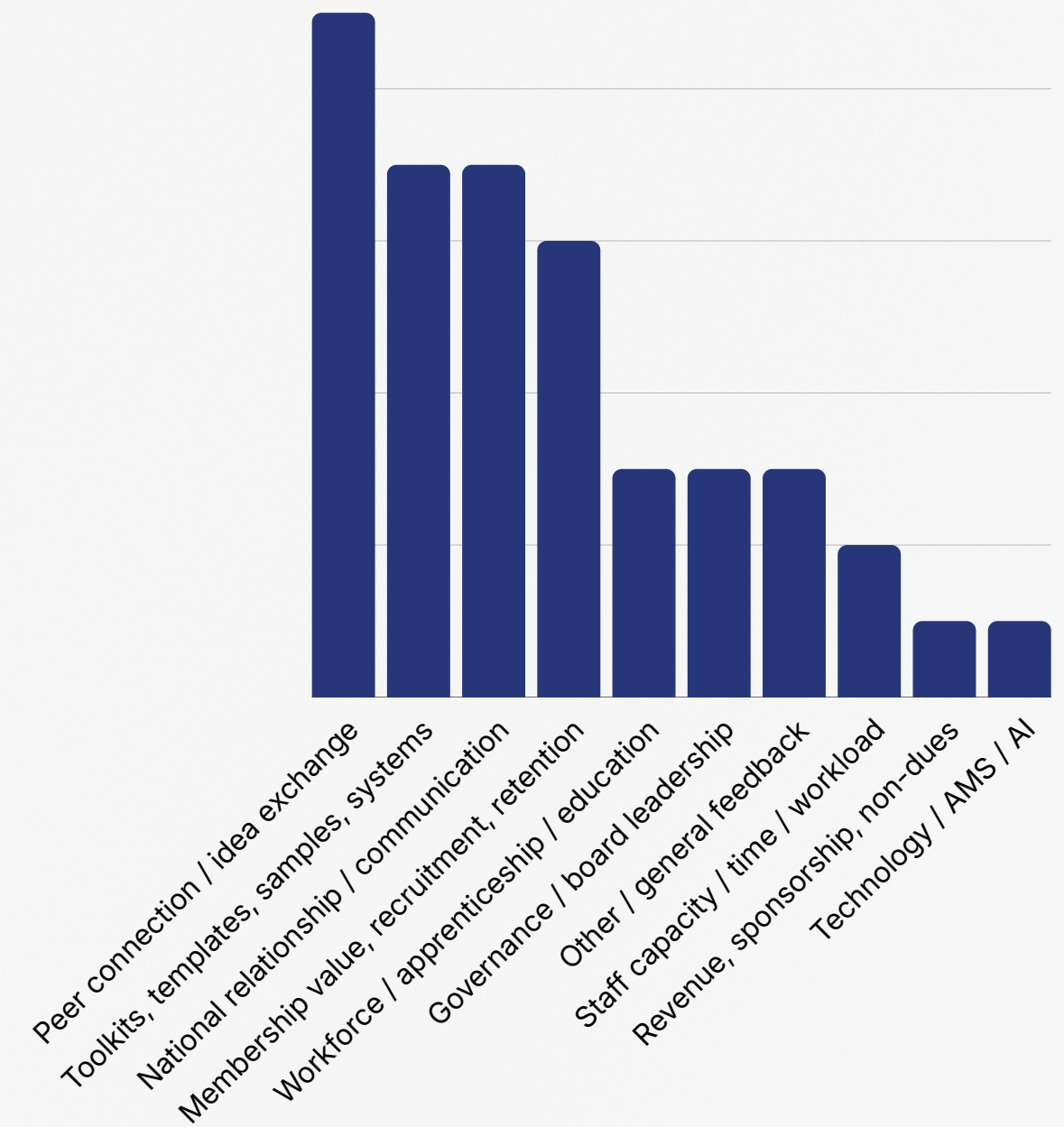


# Survey Detailed Overview

## Immediate Value Next Year (Open Ended Summary)



## What AEC Should Be Known For (Open Ended Summary)



# Key Themes Goals



## Member Burnout and Isolation are Real Concerns

Survey feedback and discussion reflected that many executives feel stretched, isolated, or unsure where to turn for help.

**GOAL:** Design more intentional in-person and virtual networking opportunities.

- Strategy: Create Peer Groups
- Strategy: Add member “expert knowledge” to website for easy access to peer knowledge and experience



## AEC Needs a Centralized Resource Hub

Members want easier access to templates, playbooks, education recordings, member benefit examples, partner programs, and successful state initiatives.

**GOAL:** Create central hub for resources

- Strategy: Launch online community
- Strategy: Finalize Playbook with ease of accessing and contributing

**GOAL:** Create inventory of national resources

- Strategy: Work with national on templates and pieces in place for turn-key products

# Key Themes Goals



## Peer-to-Peer Connection May be AEC's Strongest Value

The importance of executives learning from one another was evident, repeated throughout multiple survey areas.

**GOAL:** Develop on-going connection framework

- Strategy: Create Peer Groups with monthly meeting
- Strategy: Explore AEC Zone Director structure for regional outreach
- Strategy: Explore mentorship program

**GOAL:** Make member access easy

- Strategy: Create directory with online community
- Strategy: Create forums on online community



## Education Should Be More Accessible and Practical

Members may not always attend live education sessions, but there is still a need for meaningful, issue-based learning.

**GOAL:** Build on inside knowledge to leverage our own experiences and expertise

- Strategy: Focus on Peer-to-Peer education
- Strategy: Host open discussion forums

**GOAL:** Make educational offerings more accessible

- Strategy: Record and post on-demand meetings

# Key Themes Goals



## New Member Onboarding Needs Improvement

There was concern that new executives may not always feel welcomed or may not understand what resources are available to help them in their new role.

**GOAL:** Be a source of support for new executives and/or chapter staff

- Strategy: Create New Executive Packet defining roles, expectations, resources
- Strategy: Organize process for reaching out to new executives and AEC members
- Strategy: Develop First Timers function for AEC members at National Events

**GOAL:** Communicate and exemplify the AEC mission

- Strategy: Communicate to new members that this is THEIR association



## AEC's Role with National Should Be More Clearly Defined

AEC needs to clarify its own mission, including how it supports executives, communicates needs to National, shares National updates with members, and serves as a liaison for chapter-level concerns.

**GOAL:** Identify clear lines of communication on behalf of AEC

- Strategy: Process of PHCC-NA Vice President and Staff Liaison communicate back to National from AEC as a whole organization
- Strategy: Process of AEC President communicate to PHCC-NA on behalf of AEC as a whole organization

**GOAL:** Communicate to executives about National initiatives or changes

- Strategy: Establish clear and concise communication process from AEC president to membership

# Strategic Plan

## Immediate STRATEGY Actions (0-3 months)

- Strategy: Launch online community
- Strategy: Finalize Playbook with ease of accessing and contributing
- Strategy: Create Peer Groups with monthly meeting
- Strategy: Create directory with online community
- Strategy: Create forums on online community
- Strategy: Establish clear and concise communication process from AEC president to membership
- Strategy: Record and post on-demand meetings
- Strategy: Communicate to new members that this is THEIR association
- Strategy: Organize process for reaching out to new executives and AEC members

## Short Term STRATEGY Actions (3-9 months)

- Strategy: Work with national on templates and pieces in place for turn-key products
- Strategy: Explore mentorship program
- Strategy: Process of PHCC-NA Vice President and Staff Liaison communicate back to National from AEC as a whole organization
- Strategy: Process of AEC President communicate to PHCC-NA on behalf of AEC as a whole organization
- Strategy: Focus on Peer-to-Peer education
- Strategy: Host open discussion forums
- Strategy: Add member "expert knowledge" to website for easy access to peer knowledge and experience
- Strategy: Develop First Timers function for AEC members at National Events

## Long Term STRATEGY Actions (9-12 months)

- Strategy: Explore AEC Zone Director structure for regional outreach
- Strategy: Create New Executive Packet defining roles, expectations, resources



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