THE MEMBER SURVEY

Executive Summary

The PBA member survey was the first of four evidence streams in the current state analysis, fielded in May 2026 to PBA's full membership. It produced 257 responses from 22 of PBA's 27 local associations, and it answers three questions the Executive Committee needs settled before evaluating any business model: *what members value*, *how they feel about the association*, and *where the current value proposition is thinnest*. Findings include:

Members hold PBA in genuine regard. Goodwill/NPS is strongly positive at +35, with 54% promoters, 19% detractors, and 85% of members consider dues fair or better. Nothing in the survey suggests PBA lacks a mission or a constituency.

Advocacy anchors the value proposition, and every segment validates it. Government affairs holds five of the top six positions in the program value ranking, rating highest for builders and associates, veterans and newcomers alike. It is not one program among many; it is the platform members most consistently identify as PBA's central function.

Programs do two different jobs, and the distinction matters for any model change. Advocacy and relational programs are what build member goodwill. Transactional benefits such as the One Call fee waiver and Workers' Compensation do not, but they are the nameable answer to "what's in it for me?" for members who rarely engage with advocacy. Treating one as a substitute for the other risks losing a function while protecting a line item.

The people who know PBA best are its sharpest critics. Local leadership service is not the dividing line: members serving on local boards score +41 in goodwill/NPS, essentially the same as members with no leadership role. The critique concentrates among PBA's own directors, who collectively score −3 and wrote critical comments at nearly five times the rate of other members.

Email is how members want to hear from PBA, and it is the channel PBA can least rely on. Members chose the email newsletter (78%) and topic-specific alerts (47%) well ahead of every other channel. The survey deployment showed reach eroding at every step between PBA's membership database and a member's inbox. Of roughly 3,800 names, 2,556 emails were delivered, and 492 recorded an open. Of those 492 opens, 257 responded. The constraint seems to be reach rather than willingness.

Three implications for the decision ahead. First, nearly half of members describe dues as worth the money paid but not more, a position that is stable but exposed to a dues increase or a stretch without visible wins. Second, specific segments are underserved and identifiable: professional-services associates, solo operators, and members between five and twenty years of tenure. Any

model built on advocacy alone would keep what members value most while removing the only nameable benefit(s) for the members least attached.

How to read these findings

The respondent base is PBA's engaged core, not a cross-section of the membership. 55% serve on a local board or as a committee chair, 71% hold senior titles, and 61% have belonged ten years or more. These figures describe surveyed members and represent a ceiling for the membership at large, not an average.

Goodwill towards PBA does not necessarily drive membership renewal. Members join and renew at the local level, so strong sentiment toward PBA and a 52.6% statewide membership decline since 2010 are not in conflict; they describe different relationships with different counterparties.

Bases vary by question, and each is stated. Partial respondents answered early questions before stopping, and many answered the core sentiment items. Rather than discard them, every figure is computed on the members eligible to answer that particular question. The recurring pools: 257 all responses → 209 rated at least one program → 197 scored goodwill → 196 answered value-for-money → 192 completed → 176 wrote open text.

Small bases are labeled and should not be read as precise. Subgroups below n=30 are directional. Subgroups below n=10 are reported only where the group is analytically necessary.

1. Survey Design, Deployment, and Respondent Profile

The member survey was fielded in May 2026 through Alchemer. Every question about PBA's programs, value, and member experience traces to that instrument.

Members entered through two paths. 198 arrived through unique tracking links, one per working member email on file, which locks each response to a single member and joins it to the membership roster. 59 arrived through general links shared by their local association, carrying local attribution only. All 257 Response IDs are unique, and a review of Response IDs and IP addresses found no duplicate or manipulated entries.

192 members completed the survey, and 65 provided partial responses. Measured against the 2,556 members the email campaign reached, participation was approximately 10%. Because general-link respondents cannot be matched to the delivery file, that figure is an *effective participation rate among the reachable membership* rather than a strictly tracked email response rate.[1] Measured against the full universe of 3,392 dues-paying Builder and Associate members statewide, the 257 participants represent 7.6%.[2] Respondents came from 22 of PBA's 27 local associations.

What the deployment revealed about PBA's email channel

The mechanics of reaching members produced a finding that stands independent of anything members said, and it runs in two directions.

Table 1. Survey email delivery funnel

Deployment Step	Count
Total Membership database	~3,800
Usable email distribution list	3,146
After survey platform validation (9 invalid)	3,137
After email platform validation (370 previously unsubscribed or invalid)	2,767
Emails sent	2,733
Delivered (177 bounced)	**2,556**
Recorded opens (19% of delivered)	**492**
Responded	**257**

Source: Alchemer deployment record and email platform logs, May 2026. Open tracking is incomplete by nature; image blocking and privacy features suppress some opens, so 492 is a floor.

Roughly one in three names in the membership database did not receive a delivered email, either because no usable address was on file, the member had previously unsubscribed, or the delivery bounced. Of the 2,556 emails that arrived, 492 recorded an open. Fewer than 500 members

statewide are known to have seen PBA's arguably most significant member communication of the year.

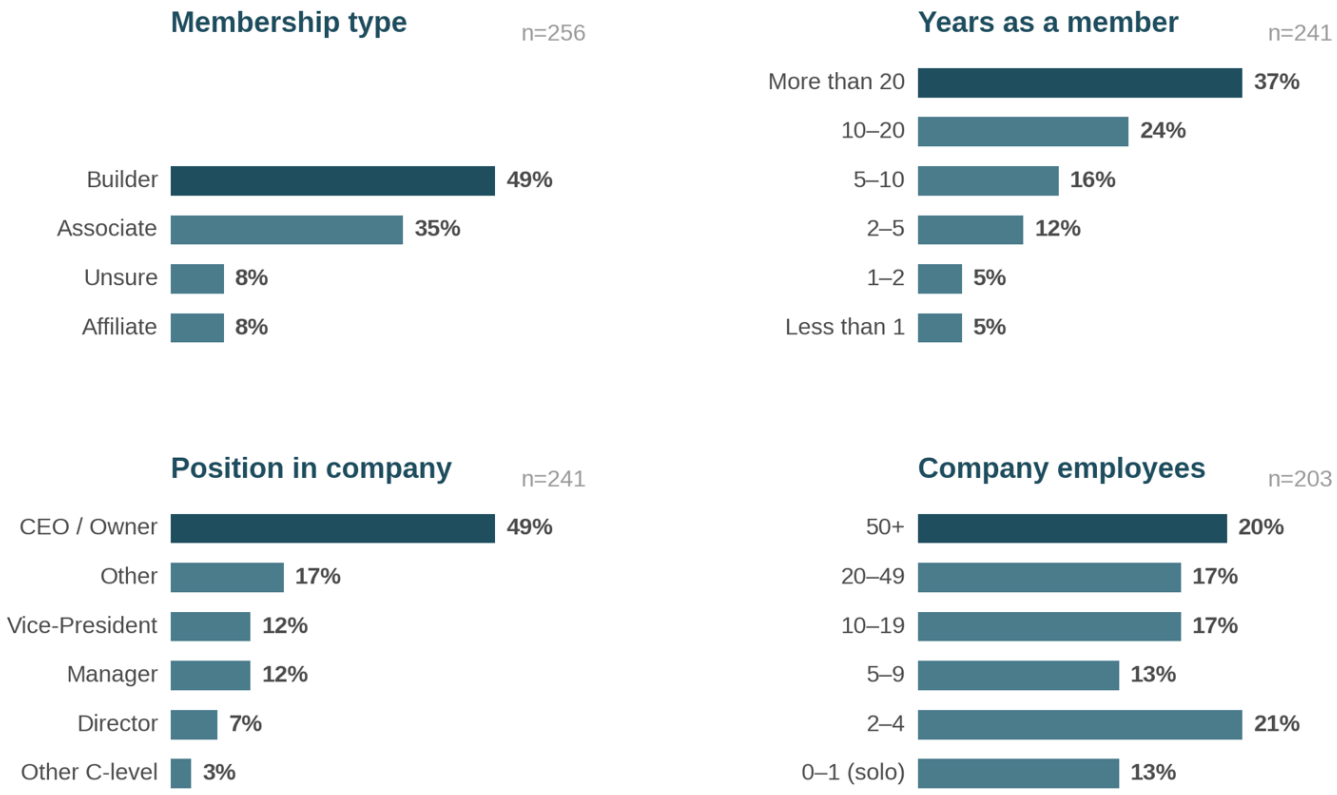
Read the other way: of the 492 members who opened the email, 257 eventually responded. Even counting only the 198 tracked responses, that is a 40% response rate among members who opened the invitation – an exceptional figure by any survey standard. The initial constraint for PBA looks to be membership reach, not willingness. Section 5 returns to what this means for member communications.

Figure 1. Survey response pools *Base: n=257 responses. Pools are per-question rather than sequential; the goodwill and open-text pools each include partial respondents.*

257 total respondents	**100%**
209 rated programs	**81%**
197 scored NPS/goodwill	**77%**
196 answered value for dues	**76%**
192 completed the survey	**75%**
176 contributed open text responses	**68%**

Who responded

Figure 2. Respondent profile. *Bases as marked. Self-reported.*



Respondents self-identify as 49% builders, 35% associates, 8% affiliates, and 8% unsure of their own category (n=256). Builders concentrate in single-family construction (45% of builders answering) and residential remodeling (26%); associates in subcontracting and specialty trades (31%) and professional specialties such as law, accounting, and architecture (22%).

Respondent builder firms are larger than the national industry profile, reporting a median of 10 employees and 12 housing starts in 2025 (n=118; n=53). NAHB's 2024 builder member census, however, puts the median national builder member at 6 employees and 6 starts.[3] Half of responding builders report fewer than ten employees, so the base is not dominated by large firms, but the respondent base does skew toward builders with more scale than the typical NAHB member. These are members with the volume to encounter regulatory friction directly, which is worth carrying into any reading of program ratings.

Self-reported membership type does not fully match the classification PBA carries from NAHB. For the 197 respondents where both are available, the two agree 67% of the time—73% among members who selected a category rather than answering unsure (n=181). Roster-classified builders confirm their own category 86% of the time; associates 63%; affiliates just 14%, with thirteen of twenty-two members whom the roster books as affiliates identifying themselves as builders. The likeliest explanation is straightforward: affiliate members work for builder and associate firms and describe themselves by the business they are in rather than by the dues category they joined under. A further 8% of respondents selected "unsure," and that group skews associate and less involved: 4 of the 20 answering the question serve on a local board or as a committee chair, against 55% across the sample.

This reflects how membership is experienced, not a data anomaly. Membership categories set dues rates, apportion board seats, and define which value proposition a member should receive. That roughly a third of respondents described themselves differently than the NAHB roster suggests that those categories register more faintly in members' sense of belonging than the structure itself assumes. For this analysis, builder and associate comparisons in this report use the self-reported membership type as the baseline.[4]

Three observations of the respondent base

The respondents are the involved core. 55% serve on a local HBA board or as a committee or council chair (n=240). That is several times the share of members holding formal governance roles in a typical association. 61% have been members ten years or more; only 10% are in their first two years. This is the most informed segment of the membership, and the most invested.

Locals are unrepresented or underrepresented. Five locals produced no responses at all: Franklin County, Adams County, the Alleghenies, Schuylkill, and Somerset, together 144 members.[2] Additionally, two of the four largest locals responded below their expected share: BIA of Philadelphia contributed 12 responses against roughly 29 expected, and York BA 6 against roughly 25.[5]

PBA's directors responded at a high rate. Forty respondents are PBA Board of Directors members spanning 16 HBAs. Against 102 directors statewide,[2] 39% of PBA's board responded, compared with roughly 10% of the membership overall. Directors are 2.7% of the membership list and 15.6% of respondents, the largest single skew in the sample.[6] Two consequences follow for reporting: the governing body engaged with this survey at four times the rate of the membership, and the director subgroup is large enough to analyze separately, both explored in Section 2.

2. Member Sentiment: The Goodwill Score

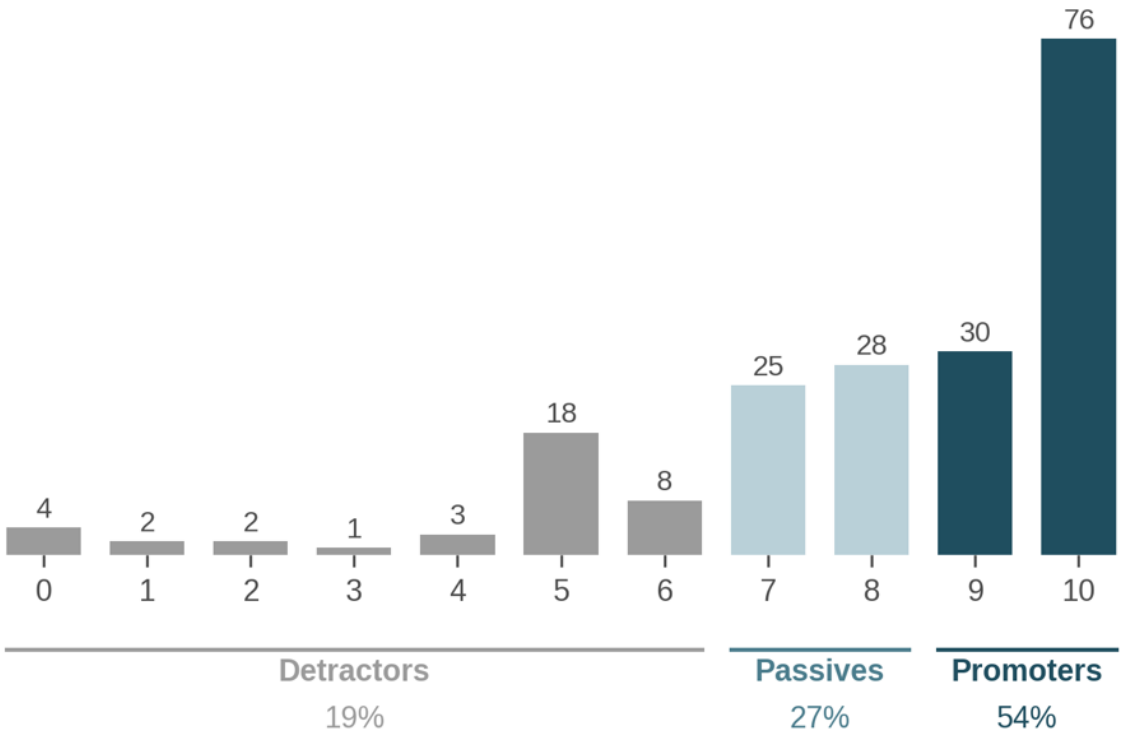
How the score works, and how we modified it

The survey measures member sentiment using a ***Goodwill Score built on Net Promoter Score methodology***; NPS is the standard loyalty metric used across industries to measure customer satisfaction and retention. Respondents answer the question, *"How likely are you to recommend us to a friend or colleague?"* on a 0–10 scale. Those scoring 9 or 10 are promoters, 7 or 8 are passives, and 0 through 6 are detractors. The score is the percentage of promoters minus the percentage of detractors, producing a result between −100 and +100.

That traditional NPS question, however, does not cleanly translate to PBA, because members do not directly join PBA. They join a local HBA, and PBA and NAHB membership follow as part of the three-in-one value proposition. The item was therefore modified to measure *member goodwill*: how likely a member is to speak positively about the state association to a friend or colleague in the industry.

Overall NPS/Goodwill score

Figure 3. Distribution of member goodwill scores. *Base: n=197 who scored the item. Scale: 0–10, "How likely are you to speak positively about PBA to a friend or colleague in the industry?"*

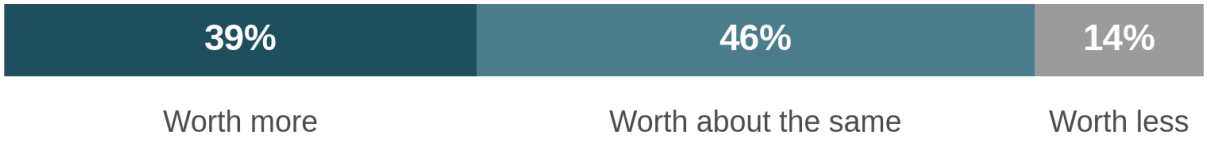


The average among the 197 members who scored the item is 8.1 out of 10, with 54% promoters, 27% passives, and 19% detractors, producing a **Goodwill Score of +35**. The shape of the distribution matters as much as the score: 76 members, nearly four in ten, chose a perfect 10. This is a substantial and genuinely enthusiastic core with a modest critical tail, not a lukewarm average.

Perceived value relative to dues

The survey went even further, asking whether membership is worth the dues their company pays (n=196): 39% rated it worth more, 46% worth about the same, and 14% worth less. Taken together, 85% consider the dues fair or better.

Figure 4. Perceived value relative to dues paid. *Base: n=196.*

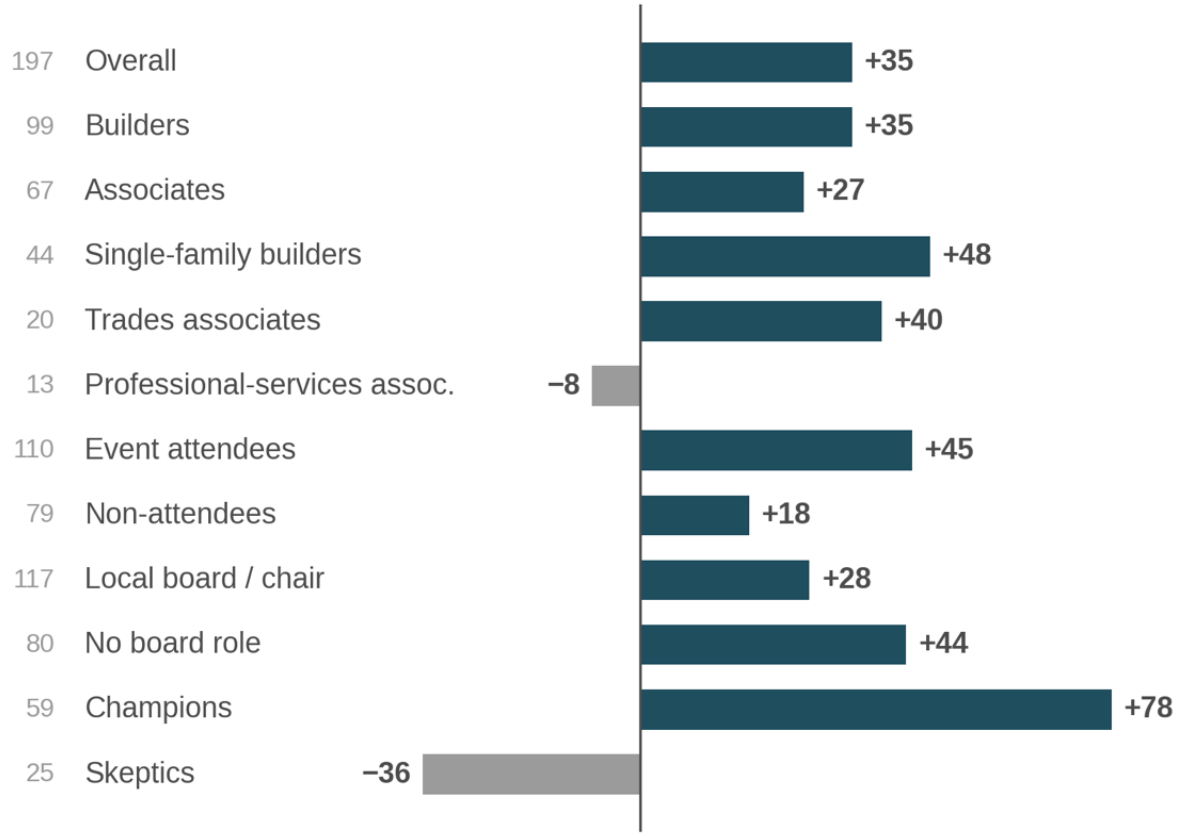


The largest group (46%) is in the middle, and that is exactly where the opportunity lies. Nearly half of surveyed members are saying, in effect, that they can justify the dues but are not getting more than they pay for. While the position is stable, it is also exposed, vulnerable to a dues increase, an economic downturn, or a stretch of time without visible wins. Because renewal happens locally, these are exactly the members whose renewal depends on their local EO having a ready answer to why the dues are worth forwarding to the state.

What this means. While leaders naturally want to focus on moving the critical tail to the middle, a more meaningful opportunity is moving the 46% from "acceptable" to "more than worth it." That is a problem of demonstrating value, not of improving satisfaction. Sections 4 and 6 suggest that at least some of the value the middle group cannot feel comes from programs and services PBA already delivers but does not successfully communicate.

Goodwill measures by member segment

Figure 5. Goodwill score by member segment. *Base: respondents in each segment who scored the goodwill item, as marked. Segments below n=30 should be considered directional.*



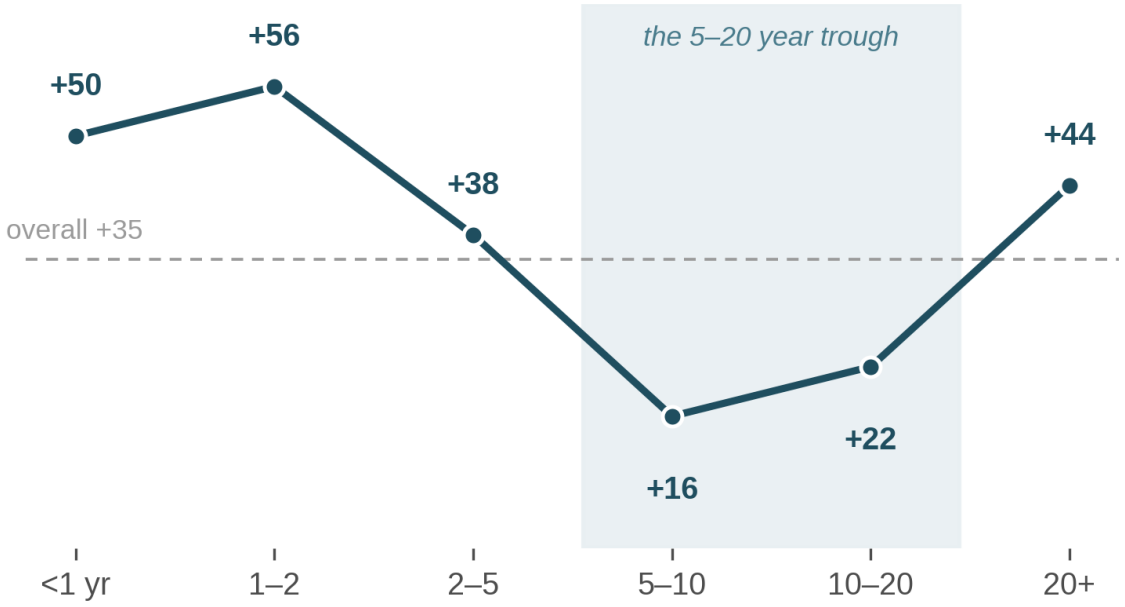
The overall +35 score conceals wide variation, which offers strategic insight. Builders score +35 (n=99) and associates +27 (n=67), a modest gap that hides more than it shows. Digging in:

- **Single-family builders, the association's historical core, score +48 (n=44).** Subcontractors and specialty trades, the associates closest to the construction value chain, are close behind at +40 (n=20).
- **Professional-services associates (attorneys, accountants, architects) score −8 (n=13).** They join primarily for business development and receive a value stack built around builders. The base is small, so treat this as a pattern to investigate rather than a settled statistic, though it holds up across every version of the analysis.
- **Firm size predicts sentiment better than membership type, and it does not move in a straight line.** Solo operators score +4 (n=23); firms with 20–49 employees score an impressive +73 (n=26), with not a single "worth less" response among them; the largest firms settle back to +33 (n=33). The likeliest reason for this gap is regulatory exposure: mid-size firms are large enough to feel the impact of PBA's advocacy work and small

enough to lack the in-house capacity to influence it themselves. The overall +35 describes neither end of that range.

- **Tenure follows a U-shape**. Newer members arrive positive (+38 to +56 across the under-five-year bands, each with a small base). Goodwill falls through the middle years (+16 at 5–10 years, +22 at 10–20, +20 for the pooled 5–20 band, n=80) and recovers among veterans (+44, n=79). The dip is in the middle of the member lifecycle, among members who have been around long enough to form expectations.
- **Champions and Skeptics are derived**. Members with a mean program rating of ≥ 4.0 across all 24 program items are considered champions. Members with a mean program rating of ≤ 2.5 are considered skeptics.

Figure 6. Goodwill score by tenure *Base: n=197. Under-five-year bands carry small bases.*



- **Local membership size makes almost no difference:** large locals +35, mid-size +32, small +38 (n=116/57/24). Small locals lost 34% of their members between 2019 and 2025, against 12% for large locals, but members of small locals think just as well of PBA as anyone else. Whatever is driving small-local attrition, it does not appear to be sentiment toward PBA.
- **Goodwill varies enough by local to be worth a conversation**. BA of Central Pennsylvania (+79 on 14 scored), Metro Pittsburgh (+63 on 35), and Metro Harrisburg (+55 on 11) sit well above the average and may hold practices and relationships worth understanding. York BA (−40 on 5) and Northwestern PA (−33 on 6) sit well below, on bases too small to characterize.

What this means. PBA's goodwill is strongest where its historical value proposition was built to land: established builders with real regulatory exposure. It is thinnest among solo operators,

professional-services associates, and members in their middle years, segments the current program stack was not designed around. The survey does not tell us if these are the members who have been leaving the federation, but it does identify where the PBA value proposition is currently weakest.

Sentiment by governance role

Asking members about local board and committee involvement gave us another dimension to compare PBA sentiment against. Additionally, because PBA Board of Directors status was appended to the original dataset, we can drill deeper and separate local leadership from state governance. That distinction yields additional insight.

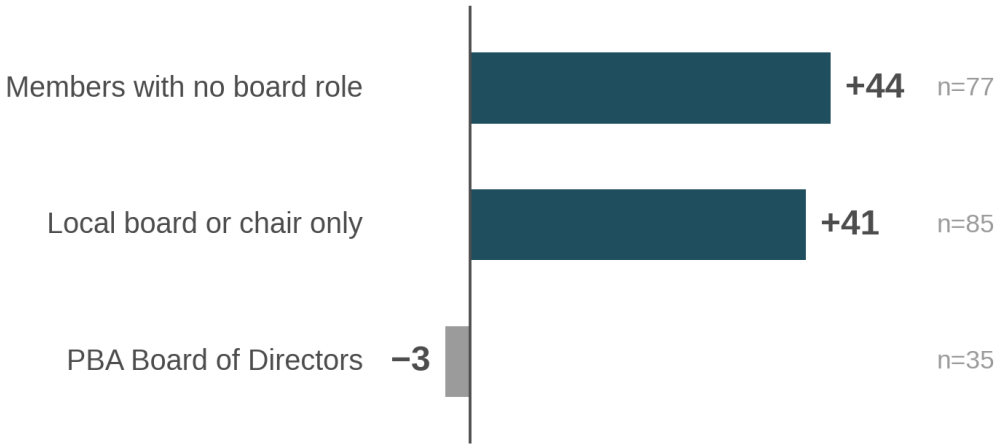
Members serving on a local board or as a committee chair score +28, against +44 for everyone else. On its face, that reads as a 16-point involvement penalty. Separating the two layers of governance shows why that initial reading is misleading:

Table 2. Goodwill score by governance role

Governance Cohort	NPS/Goodwill score	Base
Local board or committee chair, combined	+28	117
— Local board only, not on PBA's board	+41	85
— Also, on PBA's Board of Directors	−6	32
PBA Board of Directors, all responding	−3	35
All respondents not on PBA's board	+43	162
Neither local board nor PBA board	+44	77

Base: respondents scoring the goodwill item. Director status from the board list PBA provided, matched by Response ID.[6]

Figure 7. Goodwill by governance layer. *Base: n=77, 85, and 35, respectively.*



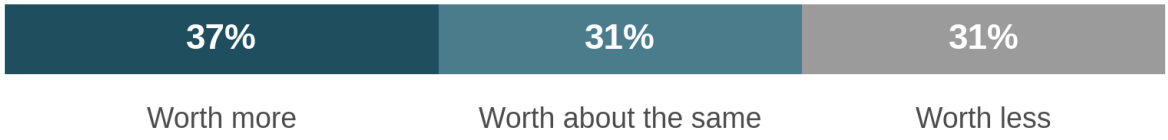
The +28 for local board members in Table 2 doesn't really describe any group. It was an average of two groups that think very differently about PBA, and averaging them produced a number that describes neither. Separating them is what makes the finding valuable.

Members who serve on a local board but not PBA's score +41, close to the +44 among members with no leadership role at all. Both are strongly positive, and the similarity is itself worth noting: taking on a volunteer leadership role at the local level does not appear to change how a member feels about the state association. The 16-point gap in Table 2 was produced entirely by the 32 local board members who also sit on PBA's board. Once those two layers are separated, the real gap is roughly 46 points wide, and it runs between PBA's own board and everyone else in the survey.

Collectively, the 35 PBA directors who scored the item produce a Goodwill Score of −3. Two segments in this survey fall below zero, and the contrast is instructive. Professional-services associates (−8) are at the periphery of the value proposition, a small group receiving little that was built for them. PBA directors are at the center and, by a wide margin, are the larger of the two.

The pattern is not an artifact of one question. Directors are 18% of the members who scored goodwill but 37% of the detractors. On the dues-value question, they are 18% of respondents but 39% of those saying membership is worth less than the dues. In the open-ended responses, nine of the fourteen members writing explicit critiques of PBA's leadership and direction are sitting directors, and 63% of directors wrote some kind of critical comment, compared with 13% of everyone else. Section 6 covers the written responses in full.

Figure 8. Perceived value relative to dues, PBA directors. *Base: n=35 directors answering (13 worth more, 11 about the same, 11 worth less). Percentages do not sum to 100 due to rounding.*



Two things keep this in proportion. First, the board is divided, rather than uniformly negative: of the 35 directors answering the dues-value question, 13 say membership is worth more than the dues, 11 about the same, and 11 worth less. Second, 32 of the 35 also serve on local boards, so while the two layers can be separated, they are never fully isolated.

What this means. This runs opposite to the expected pattern. PBA's value story does not appear to be failing in the field. In other words, local leaders who carry PBA's case into local member conversations score +41, and the general membership +43. Doubt is concentrated among people with the closest view of the organization's finances, membership trend, and operations. Their critique is informed rather than disengaged: directors responded at four times

the rate of the general membership, and their written comments are specific rather than vague, naming finances, membership decline, communications, and leadership direction. It aligns closely with the questions this engagement was commissioned to examine.

3. Member Participation and Involvement

The survey asked about participation through two questions: whether the member currently serves on a local HBA board or as a committee or council chair, and whether they have attended a PBA-sponsored event or board meeting in the last two years.

55% indicated serving on a local board or as a committee chair (n=240). 53% attended a PBA event or board meeting in the last two years (n=240; 4% were unsure). Both confirm that the overall respondent pool is the members who show up.

The more useful result is what involvement does not explain. Event attendees score higher on NPS/Goodwill than non-attendees: +45 against +18, with 110 and 79 respondents scoring, respectively. At face value, this invites the conclusion that involving members more in the affairs of the PBA produces support; however, the evidence does not necessarily reflect that. Attendance and goodwill move together only weakly ($r = 0.20$). In fact, local board service and goodwill show no relationship at all ($r = -0.09$).[7] The more likely explanation for the attendance gap is that members who already think well of PBA are the ones who choose to attend.

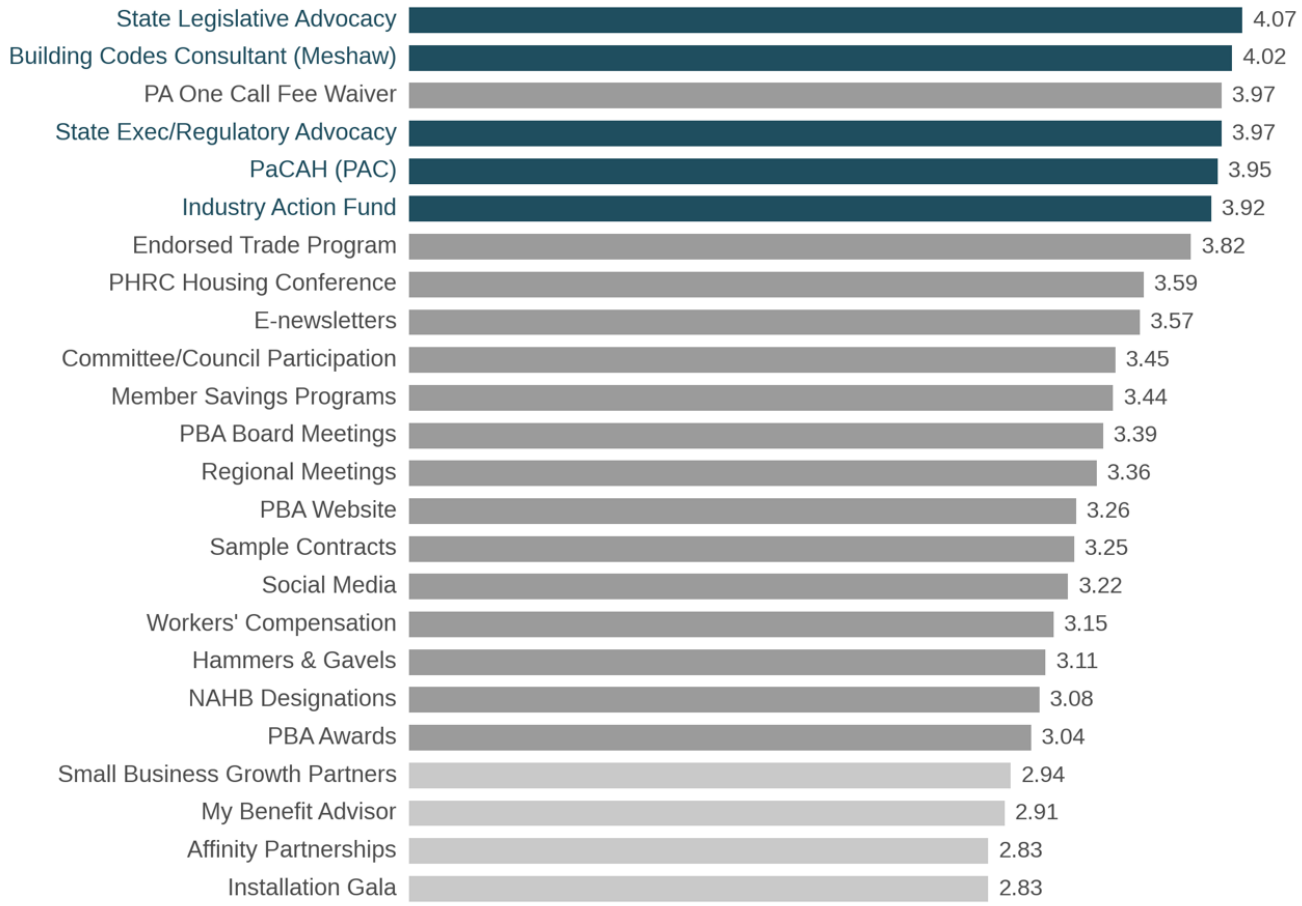
What this means. *"Increase participation and support will follow"* is not directly supported by this data. What does move with goodwill is how members rate specific programs, the subject of Section 4. For an association weighing where to put limited staff time, this is a meaningful redirection: support seems to follow perceived value, and value has a specific, measurable shape.

4. Program and Service Value

Members rated PBA's programs and services on a scale of 1 (low value) to 5 (high value), with an N/A option for programs they were not aware of or had never used. That option does double duty: it isolates value among members who know a program and signals how far each program reaches.

Program value ratings

Figure 9. Member ratings of PBA programs and services. *Base: raters per program, N/A excluded; Scale: 1 (low value) to 5 (high value).*

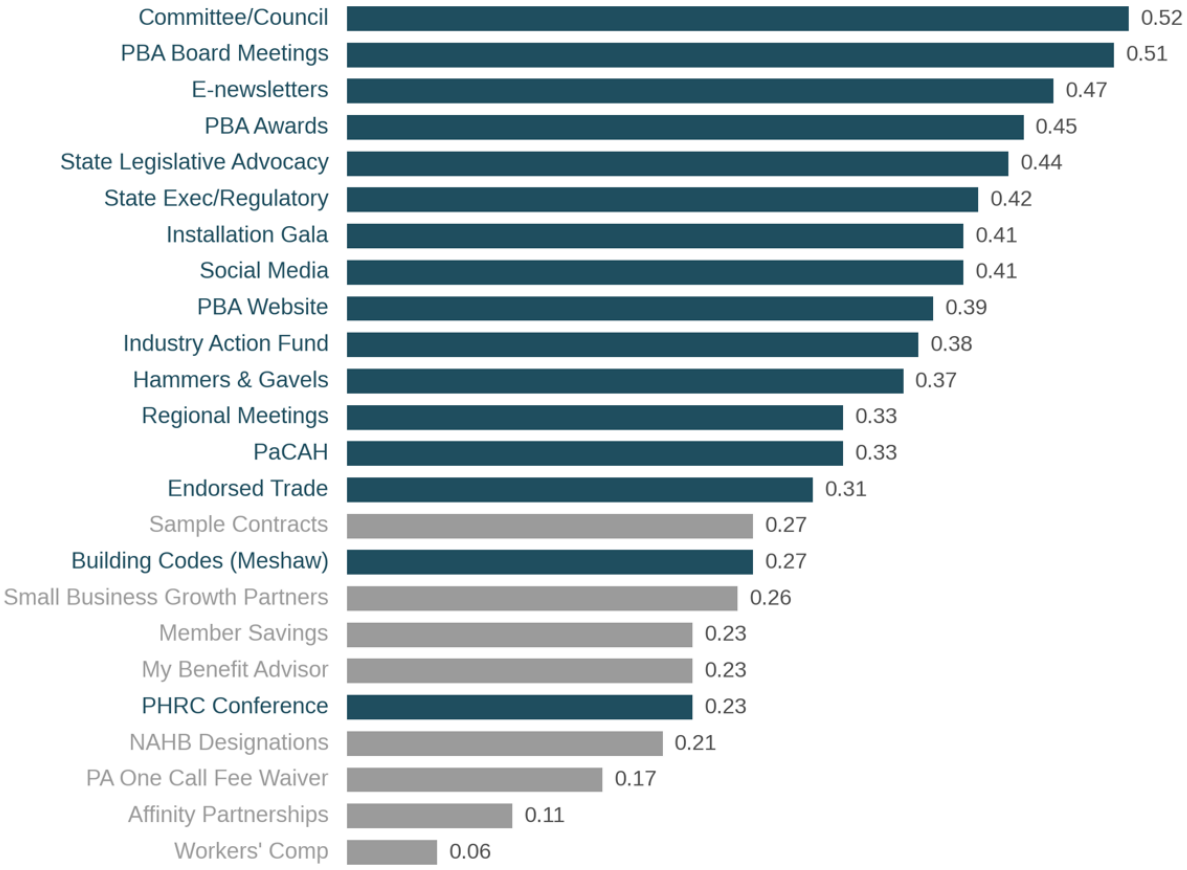


Rated on value by the members who know them, PBA's programs sort clearly: State Legislative Advocacy 4.07, Building Codes Consultant 4.02, PA One Call Fee Waiver 3.97, State Executive and Regulatory Advocacy 3.97, PaCAH 3.95, and Industry Action Fund 3.92. Government affairs holds five of the top six positions. At the other end: Affinity Partnerships 2.83, Installation Gala 2.83, My Benefit Advisor 2.91, and Small Business Growth Partners 2.94.

Advocacy holds for every member segment, including builders and associates, veterans and newcomers alike. It is not one program among many; it is the platform members most consistently identify as PBA's central function.

Which programs track with member goodwill

Figure 10. Correlation between program value ratings and member goodwill. *Base: respondents rating each program who also scored the goodwill item. Pearson correlation, pairwise complete.*



The ranking tells us what members value. A second question matters more for strategy: do the members who value a given program also think well of PBA overall?

The measure is a correlation. A number between 0 and 1 describing how closely two things move together, where 0 means no relationship and anything above roughly 0.4 is considered a moderate relationship (for our purposes).

Programs where high ratings go with high goodwill: committee and council participation (0.52), board meetings (0.51), the e-newsletter (0.47), State Legislative Advocacy (0.44), State Executive and Regulatory Advocacy (0.42). These are the relational and advocacy programs that involve or represent members in PBA's work.

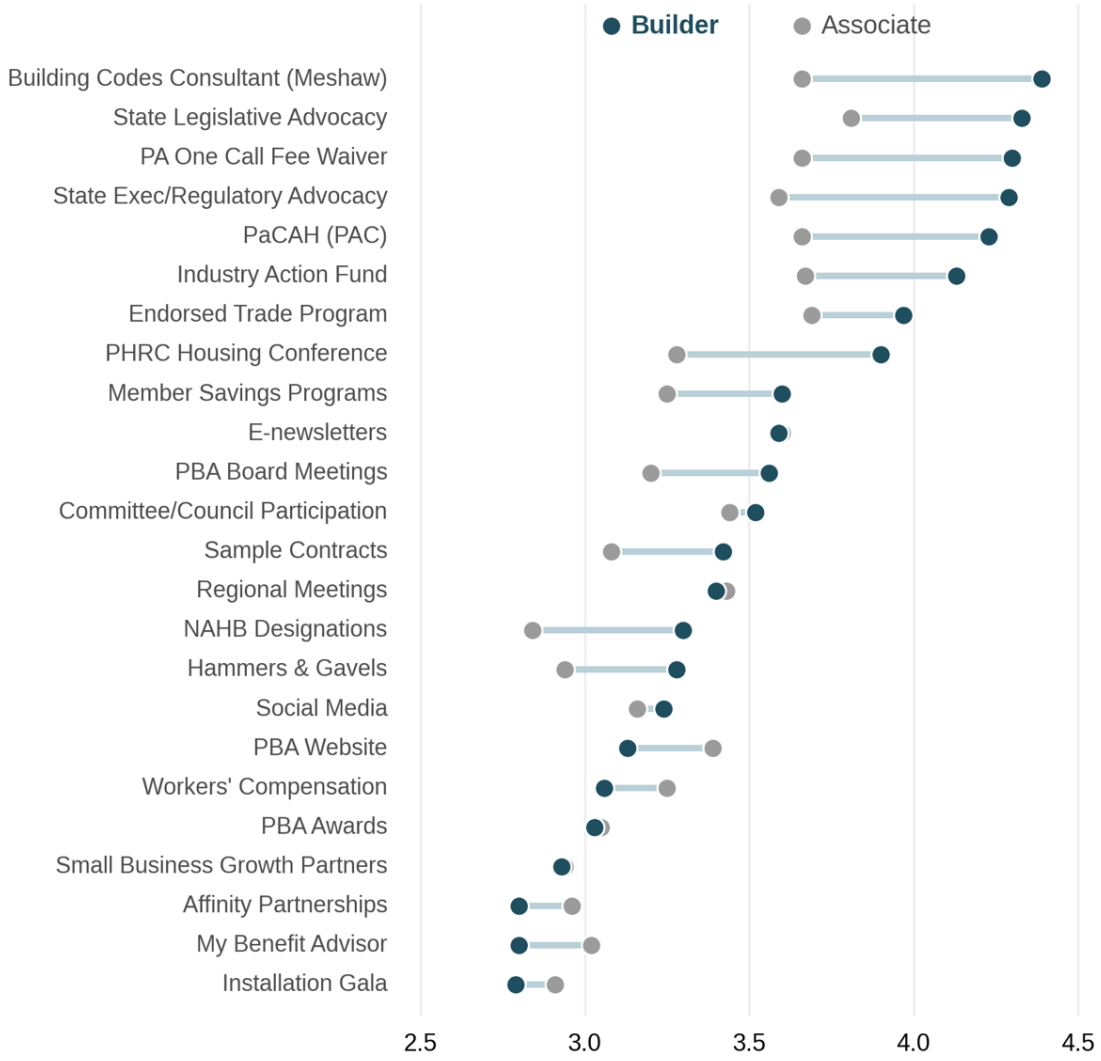
Programs where they do not correlate with higher goodwill scores: NAHB Designations (0.21), PA One Call Fee Waiver (0.17), Affinity Partnerships (0.11), Workers' Compensation (0.06). These are the transactional benefits, the ones a member uses without any particular affinity towards the PBA.

A member can value the PA One Call waiver highly and still feel little about PBA. A member who values the advocacy work tends to feel more positively about PBA. The pattern is not a by-product of who participates: involvement itself barely tracks goodwill, as Section 3 showed, and the split between relational and transactional programs holds across all 24 programs.[8]

What this means. PBA's programs do two different jobs. The transactional benefits are the concrete, nameable reasons a member can point to for belonging. Think of them as the practical floor. The advocacy and relational programs are what turn a member into an advocate for the association. Both matter, and they are not interchangeable. A member may keep paying because of the practical benefits and speak up for PBA because of the advocacy work. Any decision that treats the two as substitutes risks losing one job while protecting the other.

Value differences between builders and associates

Figure 11. Program value ratings, builders and associates compared. *Base: raters within each self-reported membership type, N/A excluded.*



The chart plots both groups on every program, ordered by how builders rated them. Read top to bottom, the two dots start far apart and steadily converge. The widest separations are all in the advocacy and regulatory cluster: Building Codes +0.73, State Executive and Regulatory +0.70, PA One Call +0.64, PHRC +0.62, State Legislative +0.52. The practical benefits tilt in the same direction, with 81% of builders rating the PA One Call waiver a 4 or 5, compared with 64% of associates.

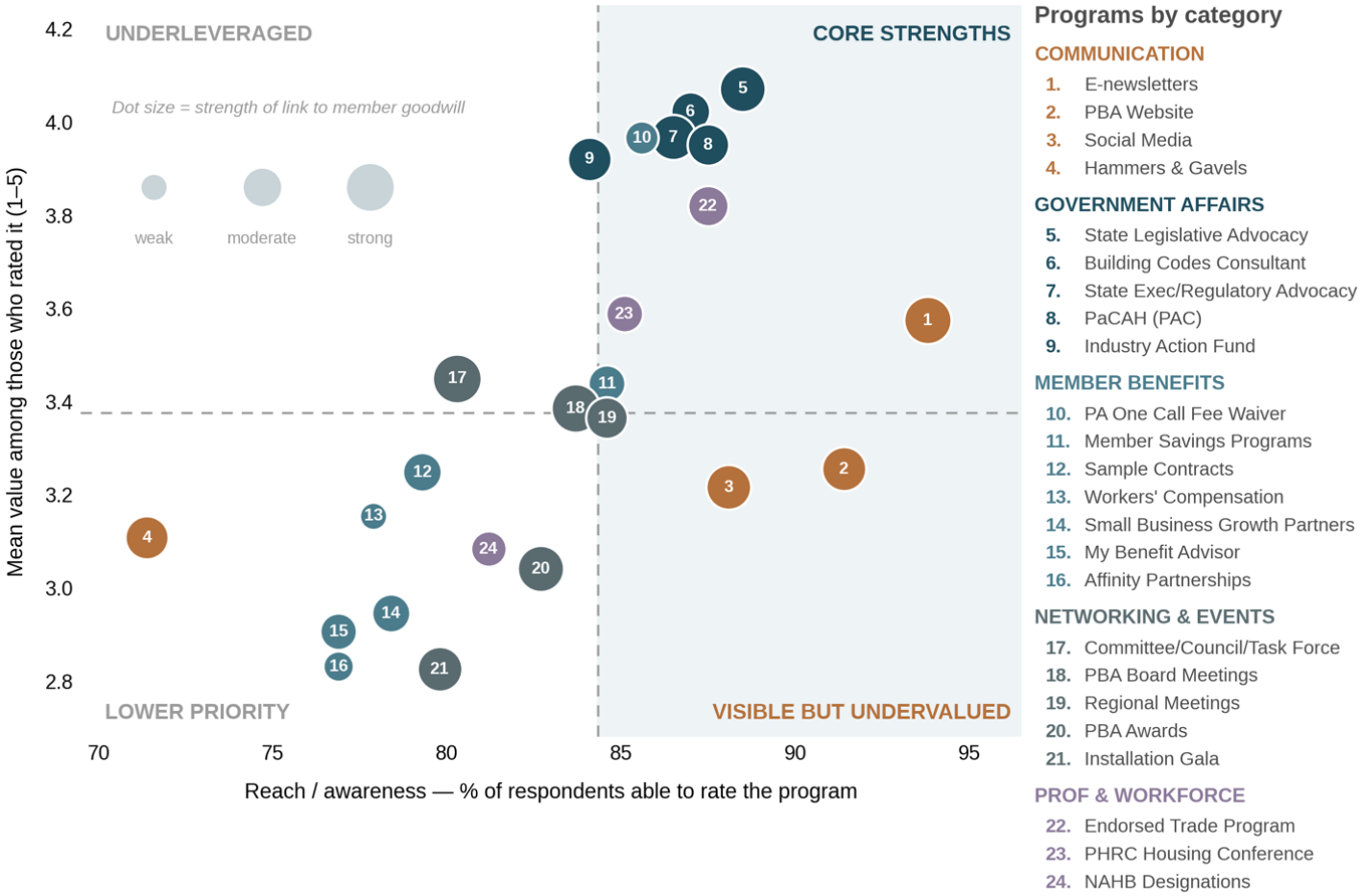
Builders rate 15 of the 24 programs higher than the associates' 9, but the counts matter less than the sizes. Where builders lead, they lead by as much as three-quarters of a point. Where associates lead, the largest margin is 0.27 on the PBA website, and most are under a tenth of a point. More telling is which programs those are. Associates rate higher on the website, Workers'

Compensation, My Benefit Advisor, Affinity Partnerships, and the Installation Gala, all of which sit in the bottom half of their own ranking. Of the six programs associates rate highest, builders rate every one higher still.

Associates are not negative about PBA. Their top-rated programs are the same advocacy items that lead for builders, and they ride the same value curve at a consistently lower elevation. The chart shows the separation is widest where PBA concentrates its work, and narrowest on the transactional benefits that sit at the bottom of the portfolio for both groups. The professional-services group identified in Section 2 sits at the far end of this pattern. The work this suggests is not communicating better to associates. Instead, it is developing a proposition for the professionals who advise and supply builders, built around market access and visibility rather than advocacy alone.

Reading distributions, not just averages

Figure 12. Program portfolio: reach and value. *Base: n=209 rating at least one program. Horizontal axis is the share of respondents able to rate each program, with N/A treated as not reached. Dot size indicates the strength of the program's correlation with member goodwill. Quadrant dividers at portfolio medians (84.3% reach, 3.37 mean value).*



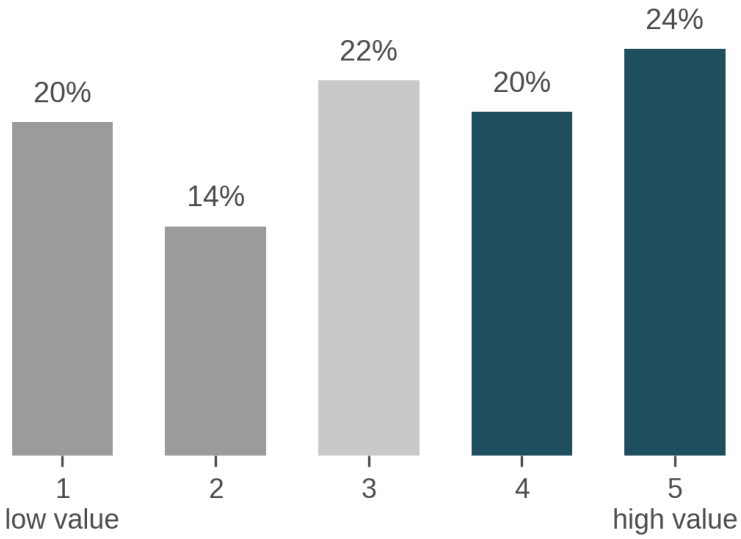
Most leaders are tempted to rank programs by average score and prune the bottom. The data isn't that straightforward. Figure 12 adds the missing dimension: how far a program reaches. Together, the two axes separate programs members know and don't value from programs members simply never encounter, and each calls for a different response.

Two programs near the bottom of the value ranking are there for reasons the average conceals.

Workers' Compensation has an unremarkable average of 3.15 (n=162), and that number describes almost no actual member. 44% rate it a 4 or 5, and 33% rate it a 1 or 2. The program is bifurcated: highly valuable to the members who use it, largely irrelevant to those who don't. Its reach is also among the lowest in the portfolio, with roughly one member in five unable to rate

it at all. Neither figure should be read as a verdict on the program. Workers' Compensation is a participation-based benefit, so members outside the program have no basis to value it, and its significance to PBA is financial as much as it is perceptual.

Figure 13. Workers' Compensation value ratings. *Base: n=162 raters, N/A excluded.*



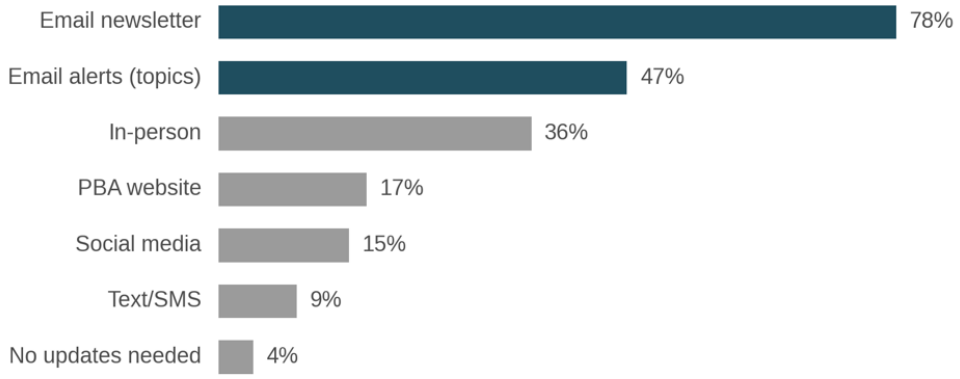
Additionally, Small Business Growth Partners looks weak on the topline at 2.94, but rates 3.47 among members in their first five years (n=30), one of the few programs that speaks specifically to newer members.

Figure 12 also surfaces a pattern that the value ranking alone cannot. The two programs most closely associated with goodwill, committee and council participation (0.52) and board meetings (0.51), sit among the least-reached programs in the portfolio, at 80% and 84%. The activities that do the most to build member attachment are the ones the fewest members can access. That is a structural constraint on any strategy built around deepening member relationships, and it points back to the reach problem in Section 5 rather than to the programs themselves.

What this means. A program's average tells you where it ranks. It does not tell you what job the program does, who it does that job for, or how many members it reaches. The four positions in Figure 12 carry different implications. Programs that are widely reached and highly valued are the core to protect and lead with. Programs valued by those who know them but reaching fewer members are conveyance problems, not necessarily program problems. Programs that are widely reached but rated modestly are candidates for repurposing or improvement. Programs that are neither widely reached nor highly valued warrant a harder look, with one qualification: several are participation-based benefits, valued intensely by a committed minority, and their averages reflect narrow use rather than weak delivery.

5. Communication Preferences and Reach

Figure 14. Preferred communication channels *Base: n=193 answering. Multiple selections permitted, so shares exceed 100%.*



Members were asked how they prefer to hear from PBA and how often. Email leads decisively. 78% prefer the email newsletter and 47% prefer topic-specific alerts (n=193, multiple selections permitted). In-person contact ranked third at 36%, and the website, social media, and text were well behind at 17%, 15%, and 9%. Only 4% indicated wanting no regular updates. On frequency, monthly is the most common preference (51% of the 185 answering), weekly second at 36%, and 14% want to hear from PBA only when something affects them directly.

The channel question is settled in favor of the one channel PBA cannot, unfortunately, currently rely on. Email carries virtually the entire delivery load of members' stated preference, which makes the deployment funnel in Table 1 the governing constraint on everything else in this section.

The finding is reach, not preference. From a membership database of roughly 3,800 names, 2,556 emails were delivered, and 492 recorded an open. Roughly a third of the database did not receive a delivered message at all, and four in five delivered messages were not recorded as opened. Whatever PBA decides to say to its members, it currently has a known path to fewer than 500 of them.

This is a data and systems problem before it is a communications problem. Addresses are missing, outdated, or previously unsubscribed; the file has eroded without a maintenance routine to arrest it. No communications strategy, however well designed, can outperform the list it runs on. Rebuilding the email file is the precondition for any of the value-conveyance work this report recommends, and it is a concrete, bounded task with a measurable result.

Beyond email, PBA relies substantially on local executive officers to relay its communications to members. That reliance is itself a structural issue. The relay is outside PBA's control, and its consistency is unmeasured. Whatever the actual rate, a communications model whose second channel cannot be observed is not a model PBA can manage or hold accountable.

What this means. The survey's clearest opportunity, converting the 46% who see dues as merely fair, depends on demonstrating value members are already receiving: wins secured, threats defeated, dollars and time saved. Members have told us exactly how they want to receive it. The sequence is what matters: rebuild the file, then run the campaign. Doing it in the other order spends effort on members who will never see the result. The survey itself provides evidence that the message is not landing today. Members, including local board members with a decade or more of tenure, reported discovering PBA benefits from the survey instrument itself (Section 6). An instrument built to measure awareness inadvertently became a measure of its absence.

6. Open-Ended Responses

The survey included several open-ended questions. What follows summarizes what members wrote in their own words. These are qualitative findings: theme counts are approximate, because responses were hand-coded and a single response can touch several themes. They describe what respondents said and are not generalizable to the full membership. A theme mentioned by a dozen members is a signal worth noting, not a measured trend.

How members describe PBA in three words

Figure 15. Three words members associate with PBA. *Base: 455 words from 160 respondents. Word families consolidated; grey indicates negative-leaning terms. Size reflects frequency.*



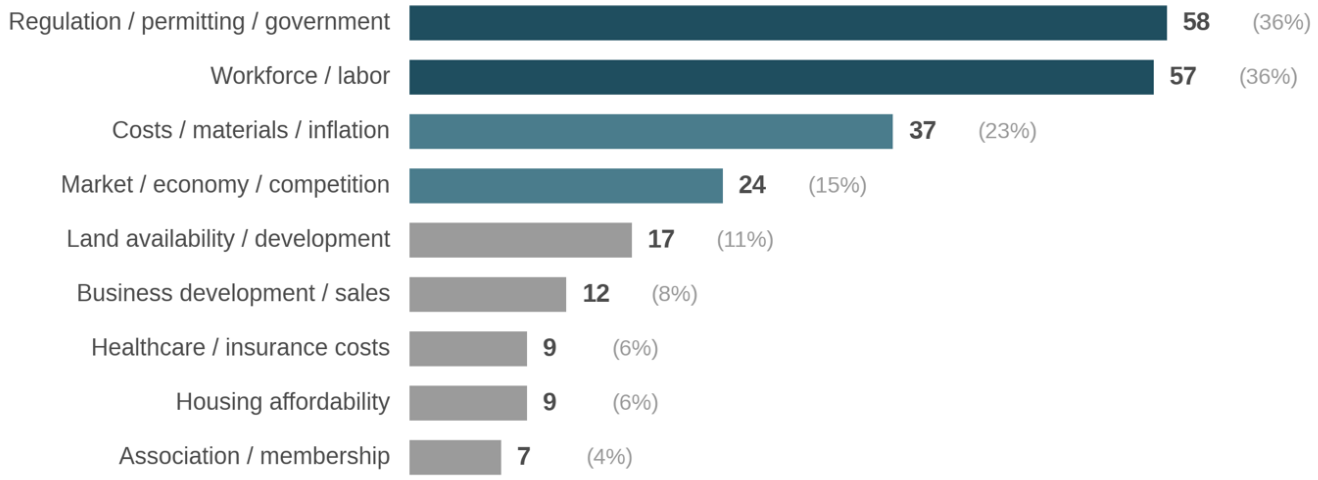
Asked for three words describing PBA, the dominant vocabulary is advocacy (55 mentions), networking (41), and education (25), followed by support, value, professional, necessary, and government affairs. This is the value proposition in members' own compression, and it maps closely to the program ratings in Section 4.

A smaller negative sentiment accounts for roughly 7% of the words offered: disconnected, stagnant, old school, uninvolved, lacking, and outdated. The criticism is not that PBA does the wrong things; some members see PBA as an organization that has not kept pace.

The challenges that members name

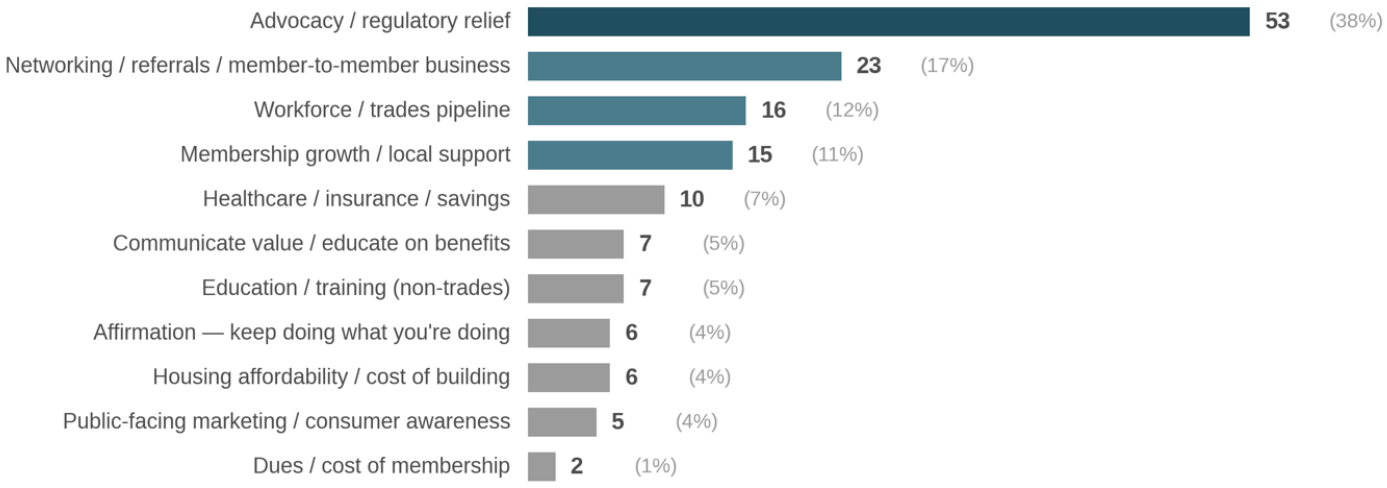
Members were asked, in their own words, what challenges their business faces and what single thing PBA could do to help. Responses were coded by theme; a single response may carry more than one, so the counts describe how often a theme appears rather than how many members hold one view.

Figure 16. Business challenges identified by members. *Base: 160 substantive responses. Multi-coded; a response may carry more than one theme.*



What members say is hardest divides into two challenges of nearly identical weight. Regulation, permitting, and government overreach appear in 58 of 160 substantive responses, and workforce and labor shortage in 57. Each is named by roughly a third of members, and both sit well clear of everything else: costs, materials, and inflation (37), market and competitive pressure (24), land availability and development (17), business development (12), healthcare and insurance costs (9), and housing affordability (9).

Figure 17. What members ask PBA to do. *Base: 139 substantive responses. Multi-coded.*



What members ask PBA to do narrows sharply. Advocacy and regulatory relief accounts for 53 of 139 substantive responses, more than twice the next theme. Networking, referrals, and member-to-member business follows at 23, then workforce and trades pipeline at 16, membership growth and support for locals at 15, and healthcare, insurance, and savings at 10. Below that, several small themes carry strategic weight out of proportion to their counts: communicating value (7), education and training (7), public-facing marketing (5), and six members who used the question simply to say PBA should keep doing what it does.

Reading the two together produces the section's most useful result. Members name two problems of equal size, but they do not ask PBA to solve both. Regulation is where they want PBA to act; workforce, despite being named just as often as a business problem, converts into requests at roughly a third the rate. That asymmetry reflects a mandate rather than need. Members appear to see advocacy as PBA's job and workforce as a shared industry problem.

The second-ranked request is the more surprising one. Twenty-three members asked for help finding customers, referrals, and business from other members, ahead of workforce and well ahead of anything program-related. That is a request for commercial value, and it comes disproportionately from associate members, whose position in Sections 2 and 4 shows the current value stack serving them least.

Four themes worth noting

The charts above count how often each theme appears. What follows is what some members actually wrote, which carries detail the counts cannot.

On workforce, the requests are specific. Members did not simply name a labor shortage. They proposed remedies: engage high schools and technical schools, fix apprenticeship programs that give students too little real time on site, promote the trades as a career, bring engineering and design into trade education. One of the survey's sharpest critics put it most strongly: *"If PBA only focused on recruiting and training the future tradespeople it would be worth it."* PBA already works in this space through the Endorsed Trade Program and PHRC, both of which rate well among the members who know them. That gap between what PBA does and what members are asking for is a visibility problem, not a program gap.

On serving the locals, the loudest voices are PBA's own directors. Members who described PBA's role as supporting local associations were disproportionately board members: *"Help locals succeed." "Show some sort of leadership to locals." "Provide more assistance to locals, since we are the driving force in the association." "PBA should look at some locals to see how an organization should be run."* Separately, a few members located their experienced value at the local rather than the state level, one writing that the local and NAHB deliver the value and PBA does not. Others credited PBA with supporting locals well. The direction is consistent; what the survey does not establish is what form that support should take, because no question asked.

On member-to-member business, the ask is commercial rather than political. Members asked for referrals, member-to-member commerce, and business development support: *"members buy*

from members," "facilitating referrals," "create an advertising plan for members to assist in business growth." One reported proposing a referral program to PBA and receiving no response, adding that PBA is stuck in the past. As Figure 17 shows, this is the second-ranked request overall, and it comes disproportionately from associate members, whose position in Sections 2 and 4 shows the current value stack serving them least.

On health coverage, a few members remember having it. Members asked PBA to offer, restore, or broker a group health program, one proposing a member group policy specifically to reduce costs for small firms. Two framed it as a return rather than a request: *"Bring back Health Care"* and *"Better health care rates as experienced in past years."* Two decades after the program ended, its absence is still described as a loss.

7. Implications for the Decision Ahead

At least five survey findings could easily carry into the model scenario analysis.

1. PBA has real member support, but support is not the same as renewal. Members hold the association in genuine regard (+35 goodwill, 85% saying dues are fair or better) and consistently identify advocacy as its core function. Nothing in the survey suggests PBA lacks a mission or a constituency. But goodwill toward PBA and the decision to renew are separate things. And PBA's contribution to renewal is the material it hands the local EO to close with: advocacy wins, tangible member benefits, proof points, and access to state-level information. *What the survey does not establish:* whether improving that material changes renewal behavior.

2. Advocacy is the right core, but advocacy alone is a narrower proposition than it appears. Every segment validates the advocacy work, and it is the single most reliable driver of member goodwill. But the practical benefits do a different job; they are the concrete answer to "what's in it for me" for members who never engage with advocacy at all. A model built on advocacy alone would keep what members value most while removing the nameable benefit(s) for the members already least attached. *What the survey does not establish:* the financial weight of each function.

3. The largest, and arguably most influential cohort of members, are the 46% who perceive the value of dues to be worth, but not more, than the price paid. Moving them requires demonstrating value they are already receiving but not registering, building additional value, and communicating regularly through the channel they have told us they prefer, which in turn requires rebuilding the email file first (Section 5).

4. Specific segments are underserved, and they are identifiable. Professional-services associates, solo operators, members in years 5 through 20, and members who cannot place their own membership category are not scattered dissatisfaction. They are groups the current value stack was not built around. This is less about what a model change would take away, and more about what was never there in the first place.

5. PBA's board is its own sharpest critic, and that changes what the September session needs to accomplish. The 35 directors who scored the goodwill item collectively produce a −3, against +43 for the membership they govern, and they wrote critical comments at nearly five times the rate of other members. The people with the clearest view of PBA's finances, membership trend, and operations are the ones saying the model needs to change. Their written comments independently describe the same analysis this engagement was commissioned to perform. The practical consequence is that the case for change does not need to be made to PBA's leadership; a substantial portion of it is already convinced. *What the survey does not establish is* agreement on which changes take priority. The directors' written comments point in several directions, and the board is divided on the value question itself. Building alignment on a direction is key to the models discussion.

Notes

1. Counting only the 198 responses attributable to tracked invitations, the strictly measured email response rate is 7.7% of the 2,556 delivered. Affiliates were invited and did respond, but are not in the 3,392 figure, which counts builders and associates only. This is one reason the delivered-base rate is the cleaner comparison.
2. Membership figures throughout this section are drawn from the February 28, 2026 membership list: 3,392 dues-paying Builder and Associate members (1,298 builders, 2,094 associates), 3,826 total names including affiliates, and 102 board designations.
3. NAHB, *Who Are NAHB's Builder Members?*, special study published August 2025, reporting the 2024 builder member census. The NAHB figures are medians across its full builder membership nationally; the PBA figures are medians among survey respondents who identified as builders and answered the relevant question. The comparison is directional rather than like-for-like.
4. Both classifications are retained in the dataset and keyed to Response ID, so any analysis in this report can be reproduced on either basis. Self-report is used throughout because it is near-complete (256 of 257 against 198 of 257 for the roster field) and because it is the only classification available for the 59 members who entered through a general local link.
5. Expected responses are computed as the local's share of the 3,392-member universe multiplied by the 257 total responses.
6. Director status is identified from the board list PBA provided for the survey invitation file and matched to responses by Response ID. That list carries 102 directors, the same count independently recorded as board designations on the February 28, 2026 membership list; the share-of-membership figure uses that list's 3,826 total names. Directors who entered through a general local link rather than a tracked invitation cannot be identified, so the count of 40 is a floor.
7. Correlations reported here are Pearson coefficients computed on all respondents answering both items.
8. The programs correlating most strongly with goodwill are not the programs most associated with participation: event attendance and board service correlate with goodwill at 0.20 and −0.09, respectively (Section 3), so the relationship between program value and goodwill is not necessarily a by-product of who participates.