WEFMAX Day I

SESSION I: Host Session – Joint Annual Conference

Scribe Notes By: Shannon Lambert

Moderated by: Scott Woodward

- Joint Conference with KY/TN AWWA for the last 16 years.
- Formulated a Joint Steering Committee with representatives from both organizations for decision making.
- Been very successful together.
- Conference guidelines prepared and followed by JSC and planning committee.
- Split proceeds 50/50.
- Rotate conference between cities in both states. Local utilities host the conference in each city.
- Growth from 1447 in 2013 to 1863 in 2018.
- YPs lead a Water for Life event at each annual conference to engage the local community.
- Conduct a Utility Manager’s Forum. Invitation only for utility managers to discuss issues they are dealing with. No consultants or equipment vendors.
- 250+ exhibitors.
- 120 sessions for the technical program.
- Beer reuse project under development in 2019 for the WPC. Named Next Round Brewing. 4 local craft breweries participating.
- Created a Water Professionals Leadership Academy to develop future leaders in the water industry.
- KY-TN WEA rebranding effort. Preparing for recruiting the next generation of water professionals.
- AWWA doesn’t advertise the beginning product. They focus on the finished product. Why does WEA?
- Changing from focus from Wastewater to Clean Water. We aren’t wasting water. We are cleaning water.
- Changing to Clean Water Professionals of Kentucky & Tennessee. We are the future of water.
- Where are you seeing clean water language used in your state?
  - SRF
  - Utilities making the change
  - Clean Water Act
- Do you foresee your organization adopting clean water language in the near future?
BGMU making the change to get out of the shame bubble.
KY/TN WEA asking member utilities to change from wastewater to clean water.
Providing guidelines for adopting clean water language. Trying to make a clean water movement.
Any objections? Feedback is change will be difficult.
Michigan is introducing Utility of the Future. MA needs to become utility of the future. MA leading the way is very important.
New Jersey – go to schools to educate of 5 steps to wastewater treatment. 3 yrs ago changed to my water legacy by WEF in the beginning of the presentation. Started rebranding to recycled water. Not a sewage authority. Get applause from students.
New York – Encouraging the name change of utility facilities.
How can we incorporate the rural/small communities into the clean water movement?
Still many areas that are unsewered. AL actively seeking a way to reach these communities.
Getting the regulators to adopt the name change is important to the success of the movement.
How can the clean water movement be utilized to help close the gap on social justice?
Rocky Mountain – out of the radar of public perception. When it goes in the toilet, it goes away. Need awareness on all the good things we do in the water sector.
Texas – Movement to reclaim. Nothing to be shameful of. Does clean water preclude the use of reclaim. Is there a potential conflict/confusion in the language change?
Want operators to be proud of their work. No such thing as a hidden utility any more.
Sewer plant by definition would be a plant that manufactures pipes. Need to use this movement to educate public to get their support.
Don’t talk about raw products as the naming for any other sector. We shouldn’t do it either. Should be named based on the end product.

WHAT’S NEW AT WEF – Presenter: Lynn Broaddus

- Strategic Plan update: mission, vision, and critical objectives have not changed; individual goals have. Inclusivity and diversity are specifically called out.
- WEF InFLOW: program at WEFTEC bringing in students from HBCU, other MAs are starting their own versions. Diversity of association as well as water workforce. Bringing future water professionals from HBCU to WEFTEC. Howard University created a student chapter.
- Using WEFTEC to leverage our connections with members
- Communicating the value of water/water professionals
- ReNEW Water Project: driving resource recovery using metrics from surveys. Benchmarking how much is being recovered (water, energy, nutrients, and biosolids)
- Pump Award for Michigan WEA. Promoting Utility of the Future. Two recent facility winners highlighted on the MA website. Encouraged access to the receiving stream at the facilities. One facility using sheep to maintain grass around facility. Ambassadors for the facility.
• Sustainability Development Goals to be endorsed at July WEF board meeting. How can sustainable practices be implemented at WEFTEC.
• Project request: WEF needs two pins from each MA, more requests coming soon
• Improving relationships with MAs is an important initiative. The AMS system is a big challenge for the MAs.
• Brad Lovett at WEF is leading the effort to improve WEF service to MAs.

WHAT’S NEW FOR OPERATORS —Presenter: Steve Harrison

• Game Changing Education: new Operator training manual
• Manual, real world photos, all in full color, accessible language, definitions within main text
• Manual, tons of practice questions, meant to be used for test prep
• Manual, troubleshooting guides, color-coded sections on safety, tips, notes, calculations, theories of operation, overview of the components, equations in metrics and US units of measure
• Manual, second book will be released early 2020, member price is $99 and with online course is $159. Trainers Kit is $249
• Manual, Trainers kit can be customized
• Wastewater Treatment Fundamentals I – Liquid Treatment completed and available.
• Workforwater.org is being updated. Decrease scope and enhance utility. Need input of content. Solicitations will be coming through HOD. Soft launch in August.
• Need clarification of OWL vs. fact sheet? Systemic improvements have been made. Continually seeking input from membership.
• MAs do get discounts on training manuals.
• About 30 states use ABC test. Even those have slight modifications. WEF would like to see more harmony and consistency on state testing.
• Is training in manual helpful in preparing for the ABC test? Yes.

WHAT’S NEW FROM THE WEF HOUSE OF DELEGATES —Presenter: Keith Hobson

• Committee Leadership Council (CLC): committees report to CLC, CLC reports to WEF Board
• What is the HOD (House of Delegates): 3-year term, liaison between MAs and WEF
• HOD is advisory body to Board of Trustees.
• WEF is a bottom up organization. HOD is main conduit between MAs and WEF.
• HOD: deliberation unit for WEF, representation on WEF Board Committees
• HOD: 3 workgroups for 2018/2019, 5 standing committees
  o Workgroups: MA resources, Membership Diversity & Structure Initiative and Operator Initiative
  o Standing Committees: Steering, WEFMAX, Outreach, Nominating, and Budget
• HOD: delegates are here to serve the MAs; please communicate to your delegates anything you want to reach WEF
• Seeking nominations (committees and HOD at-large). Applications can be made on website.
• WEFMAX locations for 2020 and 2021 have been set. Dianne can get MA on list for hosting future WEFMAXs.
• Grants to MAs have been awarded through the Budget committee.
• Board Committees
  o WEF Nominating
  o WEFTAC Advisory
  o Constitution and Bylaws
  o Finance & Audit
• Who is Board and what is HOD influence on the Board? HOD votes on nominations. Board is smaller group, more nimble, works on policies. Board tasked with high-level strategy, planning and fiduciary responsibilities.
• Who makes up the Board? Nominations are due June 3. Open on the website.
• HOD is communication mechanism for MAs.
• Have workgroups been selected for next year? No.

BREAK

SESSION II: Engagement Innovations
Scribe Notes By: Shannon Lambert                                    Moderated by: Aimee Killeen

OHIO WATER ENVIRONMENT ASSOCIATION – Presenter: Mike Welke
• Engaging YOUR Membership with Video: Operations Challenge and Water’s Worth It
• Video, video leads to traffic and results
• Video, emotion, family, diversity, good editing
• Video, potentially hire videographer or look to non-profits, engage people who WANT to be involved
• Video, use existing opportunities, plan ahead, tell people ahead of time, encourage participation with the WHY
• Video, use on social media, keep it short, have variety. Break up video in smaller pieces.
• Video, doable even on a small budget, not everyone loves to be on camera, board support.
• Started OneWater conference in 4 year cycle. 2021/2022 increasing frequency.
• Video produced for OneWater Conference. Operations Challenge.
• Some MAs have prepared videos during the annual conferences to provide testimonials of attendees.
• OHWEA provided 3 questions to answer to those who were speaking to allow them to prepare answers prior to being going live on the camera.
What is your water legacy? Question asked for the testimonies of members.

Videos – 80% of global internet traffic.

Video tells your story quickly and with maximum flexibility across channels.

Make questions simple and basic and give to members prior to asking to be on camera.

Good video – emotion, family, diversity, variety.

Use video to get positive message of clean water professionals out to the public.

Look for videographer to produce the video.

Make sure getting video of all types of members.

Lessons learned
  - Plan, plan and plan
  - Use existing opportunities/events
  - Tell people ahead of time
  - Encourage participation with the Why

Set up in area that promotes traffic but where a private video can be taped behind a curtain to increase comfort level from participants.

Board support is a requirement.

Video is very cross functional – use it on your website, at membership or career booths, and social media.

What kind of release is required from participants? OWEA had a release for that was signed at time of taking the video.

ROCKY MOUNTAIN WATER ENVIRONMENT ASSOCIATION – Presenter: Jeff Berlin

- Rocky Mountain Water Young Professionals: The Future of Water
- RMYPs, 12 subcommittees, 32 YP subcommittee co-chairs, Succession Planning
- Assigning discreet tasks has been part of success to engagement through committee participation.
- RMYPs, Tours/Happy Hours 4 a year near universities, keep it interesting (CU, Mines and CSU)
  - Breweries
  - WTPs
  - Water Reclamation Facilities
  - Aquarium
  - Zoo
- RMYPs, Trivia night, a way to bring the boards of each side to help YPs understand. Board and YP joint event. Organic way to integrate. Fun and less intimidating than most professional development events.
- RMYPs, YP Summit, send two members to the WEF/AWWA summit
- YP service project at annual conference
- Water for People: softball tournament between consultants and utilities, Thirstyfest (raised $16,000) 16 breweries in Denver at ACE
• RMYPs, Professional development with negotiation seminar, resume help, career path. Top 2 things asked for by YPs (tours, professional development events)
• RMYPs, successes due to constant engagement, succession planning, board participation
• RMYPs, challenges include AWWA is creating a new YP group (not a joint YP committee), organizational buy-in from YP employers (start events after working hours), geographic isolation across three states
• RMYPs, new collaboration opportunities (ASCE, Stormwater, etc), student chapter outreach, turnover is the challenge. Finding a professor to serve as the sponsor is another challenge.
• Won 5 of the 10 student design competitions. Been a good recruiting team.
• Wyoming, Colorado and New Mexico is the member states.
• YP has its own Mission, Vision and Values statement.

Q & A Time

Q: How do they nominate YPs to committees?
A: Nominating committee recommends YPs to committee

Q: Utility YPs aren’t represented. What’s missing?
A: Aware of the void. Not easy to find time to participate. Work time/shifts creates another struggle.

Q: How can we broaden participation to utility members?
A: Invite to serve on boards. Board members support other staff involvement. Help by scheduling events that could allow participation by members working on multiple shifts. Training programs can be good engagement opportunity for utility YP members. SC has its own operator conference. 2nd largest event. Over 600 attendees. Separate event helps get operators involved.

Q: Is one of the issues distance for utility YP members?
A: Possibly not diversity in utility membership near the location of the YP events.

Q: Why is WEA and AWWA separating efforts in RM?
A: Insurance and national level AWWA requirements that are putting a wedge in joint participation. The national level boards meet on some frequency and discussed the separation of the associations in RM. Other MAs are seeing similar challenges. WEF MA Engagement committee trying to address the challenge to encourage better partnerships in the MA regions. Try to hold MA meetings at utility offices to allow for more participation. Location of meetings to make it easier for utility member participation.

Q: Why was fly-in separated?
A: Challenges with travel coordination. 2020 will happen together for the next 3 years.

Q: Trivia night – Was it generic or water based trivia?
A: Water based trivia. Toilet bowl trivia. Some pop culture thrown in.
WHAT DID WE LEARN...

- Engaging younger generation. Change. Use more videos and social media to engage.
- Operations challenge to be used for operator engagement. Trimmed down version to engage operators.
- Trivia night
- Partnering with schools – providing testimonies of water professionals
- YP engagement and how we accomplish across different MAs. Give them a seat on the board.
- Maintain engagement of YPs. Be aware of market share competition with AWWA.
- TX YP on board. Make sure they understand obligations of post. They get very engaged and tend to reach others.
- Professional development engagement of YPs. Leading.
- Proving professional development opportunities for YPs.
- Collaborating and understanding AWWA’s issues.
- Some states have separate operator organizations that need to be considered.
- Video – inexpensive way to promote our sector.
- Are there policies associated with social media.
- Continue to promote One Water
- Inviting into the MA let them see themselves in the association
- Work together to solve issues with AWWA
- Intentional involvement with membership and leadership diversity
- Know how members can be active to be able to provide opportunities for engagement
- Holding events when operators are available to attend
- YP representation on the board
- Help with student design across MAs
- Webinar on how to change brand
- Helping with the rebrand to improve recruiting for future water professionals
- Media presence
- Joint conferences are more successful
- Partner and collaborate with universities
- Combining social and technical functions with YPs
- Getting a videographer to prepare video. Short clips.
- Break down smaller tasks for YPs to get engaged and involved
- Making sure everyone feels welcome in the meeting environment
- Changing message to attract younger generation into the sector
- Giving YPs a purpose in the MA
- Putting out questions prior to video production
- Guidelines for changing the brand of clean water. Helping improve pride of the water sector.
Niagara Falls sewage discharge press coverage
Four discharges in 2 months
Operator error and operator succession planning issues were the culprit
They currently have zero certified operators at the plant
Operator of the Future handout
Operator Catch 22: trainees need to have hands on experience to take the test, but they can’t get jobs without certification
Operators might not be YPs because they are often beginning a second career
Many facilities have little succession planning, are in remote communities, no potential replacement operators in the immediate area
Many vulnerabilities: Some communities have a 35% vacancy rate, which mandates overtime, and results in reduction of employee morale (denied vacation requests)
Improvements: Eliminated residency requirement, increased salaries across the state
Albany: 74% turnover in 1.5 years
Buffalo: Over the past 5 years, they have been focusing to reduce operator vacancy, increase # of operators, increase # of licensed operators, increased # of operator trainees
Reasons that operator positions are difficult to fill:
  o Regulatory
  o Training
  o Experience
  o Testing
  o Geographic
  o Unable to hire trainees
NYWEA is trying to help by holding Train the Trainer program with funds from a WEF grant, trained 60 trainers
Civil Service Communities: reduced hurdles in civil service examinations in Albany county
Operator of the Future white paper
DEP shared model for succession planning
Rebranding with new operator titles (lose sewage)
Focus on Career & Technical Education to reach out to high school students
Create and focus on pride that operators have for working in clean water

Q: Aimee Killeen: There is a living wage document available from your WEF liaison. Note that the operators are first responders. Was there a set of talking points about the need for education to
prevent these Niagara Falls type problems?
A: Those things are in the works and available now, but they were in disaster response mode at the time.

Q: Please tell us about the WEF grant program.
A: WRR Governance Council had to cancel train the trainer programs, so NYWEA applied for grant

Q: VA high schools can take online classes. Is that a possibility?
A: There is a live training requirement.

Q: Tampa discharge – poor control of message. How do you control message?
A: Right to know laws have increased overall knowledge about the systems and discussions about the realities of the systems. Crisis communication plans need to be prepared in advance. WEF has a great public outreach book.

PACIFIC NORTHWEST CLEAN WATER ASSOCIATION – Presenter: Steve Drangsholt

- Increasing Diversity: Women in Water
- 84% of our work force are white men
- PNCWA Approach: started in 2016 at Conference, first female keynote speaker, women’s networking lunch sold out
- 2017: Equity and social justice and diversity and leadership tracks, huge increase in abstracts submitted, created Woman of the Year award
- 2018: continued with diversity and leadership track, held women’s networking event again with increased attendance, record conference attendance
- Female members have increased overall
- Mentoring program, scholarships, awards, conference tracks, women’s networking events
- 2019 – continuing diversity programming
- 2020: Women in Leadership Symposium planned
- Cool PNCWA Wonder Women of Water T-shirts
- Make a more equitable system – larger table, not win/lose
- Casino analogy – even a small advantage can make a huge difference, millions of dollars in that case
- Women are a potential membership source
- Women’s lunch – coffee cards?
- Make panels more gender inclusive
- Video – mentors, role models, safe place, inspiring

Q & A

Q: Some women from some MA boards don’t actually want this
Q: How do we promote a more diverse workforce?
A: Mentor women early in their careers, unconscious bias training, research and avoid microaggressions

WHAT DID WE LEARN...

- Hawaii – nonprofit for training
- Gender diversity, increased prevalence of women at entry-level, but less in management positions
- Engage youth a young age (hs or below)
- Integrate with local universities
- Succession planning is so important
- Need a champion for diversity/inclusion at MA level
- Shelbyville, IN – increasing woman operators and lab technicians
- Work with vocational schools to highlight the water field
- Develop community relationship before a crisis
- Tuition program for vocational schools for water
- Promote at Earth Day events
- Be cognizant of language
- Differences in terms to describe women vs men
- No maternity uniforms
- Speed networking with women (seasoned matched with YPs)
- Pay scale causes smaller utilities to lose trainees to larger utilities
- Operators are first responders
- Wages are not as desirable as they should be
- Prep crisis communications
- Mentorship is important
- Women Events are strong and should continue
- Operator internships for high school students
- Difficulty to get into high schools
- Women and ethnically diverse water professionals should be recruiting
- Intention with succession planning, increase bench strength
- Establishing a pathway to a water career
- Begin recruiting with 6th graders; let those kids know this is an option before they begin a career pathway
- Treat each person uniquely to ensure equity
- Make salaries comparable to other sectors
- Sell career stability before discovering passion for that career
- How to advocate for gender or ethnic diversity – be realistic
- Virginia has a youth focus program at their annual conference
- WEASC developed a diversity matrix
• Visually allows them to identify gaps
• Consider gender, ethnicity, job classification
• Provide multi-lingual training materials/exams
• Veterans – go to the VA
• Tours with inner city kids
• Consider paid internships - summer

BREAK: (2:45 – 3:30pm)

SESSION III: Workforce Continued...
MAY THE WORKFORCE BE WITH YOU
Scribe Notes by: Joe Pavoni
Moderated by: Dianne Crilley

Motivating and Inspiring Future Leaders – Anni-Frid Santos

• People are leaving jobs at a high rate and it is increasing with people quitting and retiring
• Learn, Communicate, Act
• Learn: know how to communicate to employees by their generational traits, but remember there is an individual and get to know them
• All generations want performance-based compensation, recognition, and are motivated by interesting projects/tasks
• What drives us?
• Recognition; interesting projects; financial and benefits compensation across all generations
• Money is not a motivator when tasks go from basic to difficult
• Workers value autonomy, recognition
• We care about mastery and wanted to be treated like people
• Communicate: use personality profiles, manage by walking around (MBWA), be transparent, show empathy, LISTEN
• Act: say what you mean and mean what you say, be consistent, care
• Hot market, people are not afraid to leave
• Loss of talent; valuable experience, institutional knowledge
• Same desire but context of those desires differs among generations
• Mystery of a skill; self-direction, purpose – drivers – recognition

WHAT DID WE LEARN... Exercise provided by Anni Frid-Santos

• Table 1
  o Operations and Maintenance
- Characteristics: Shift work make it difficult to participate in professional development; Physical work in extreme conditions; back up for absence not always available.
- Value of Participation: TU is essential to maintain license or certification. Networking and leadership opportunities may not be readily apparent or available.
- Engagement Opportunities: Informal exchange of ideas and solutions to problems might be more valuable than highly technical seminars.

- Table 2
  - Operations and Maintenance
    - Characteristics: Various schedules; on call; not project oriented – work orders and check lists; go through the motions; reactive not proactive is short staffed; don’t always work together; different approaches.
    - Value of Participation: Knowledge change – learn from each other; trouble shooting; communicating about information; continuing education credits.
    - Engagement Opportunities: Training seminars

- Table 3
  - Operations and Maintenance
    - Characteristics: License is a road block; H&S compliance; Nature of the work; $$$ provide sector jobs – certification programs; Need to get starting salary up
    - Value of Participation: Networking – getting to know; Knowledge exchange; Internet.
    - Engagement Opportunities: Structure incentives for salary; think about the industry benefit; work together; consider operators as professionals; respect.

- Table 4
  - Operations and Maintenance
    - Characteristics: Support to participate/unimportant lack of awareness of importance; fewer workers than typically needed for all tasks.
    - Value of Participation: Help see that you make a difference; ability to network with peers (local conferences).
    - Engagement Opportunities: Leadership/Awareness of a problem; lessons learned; mentoring (both sides).

- Table 5
  - Operations and Maintenance
    - Characteristics: Financially and time; Intimidated by design people; design eng v opp; Road blocks – shift work.
    - Value of Participation: Networking through plant conversation- resource sharing; leadership training to op – GA; Tu/CEU – progress v job – part of something purposeful.
    - Engagement Opportunities: Skills competing; leadership training; plant tour guide; hand on training – manufacturer brings in pump etc.
• Table 6
  o Operations and Maintenance
    ▪ Work week variability; shift work; weather dependent; travel restrictions.
    ▪ Value of Participation: Continuing Ed Requirements; Training; Local Events Participation; Committee Chairs; Limited opportunities for leadership; some Board positions
    ▪ Engagement Opportunities: Training Events; Leadership Academy to Grad ceremony and annual conference.

• Table 7
  o Utility/Municipality
    ▪ Value of Participation: Hands-on real-life problem solvers; Real world; Face to face communication; networking.
    ▪ Engagement Opportunities: Provide convenient training opportunities.

• Table 8
  o Operations and Maintenance
    ▪ Characteristics: Passing exam
  o Regulatory
    ▪ Value of Participation: Opportunity to network; educate them from the utility/consultants perspective.

• Table 9
  o Operations and Maintenance
    ▪ Characteristics: Have municipality on board; Missing the boat by not engaging in collections and maintenance staff, electricians and mechanics; certification not consistent.
    ▪ Value of Participation: Career enhancement – SKMs training expose to new technologies.
    ▪ Engagement Opportunities: Include membership like a Member Association
  o Regulatory
    ▪ Characteristics: Leadership frown on networking; no happy hours or meet & greet; ethics.
    ▪ Value of Participation: Gives all professionals insight.
    ▪ Engagement Opportunities: Lack thereof.
  o Young Professionals/Students
    ▪ Characteristics: Employer support motivating!
    ▪ Value of Participation: Career Enhancement mentoring.
    ▪ Engagement Opportunities: 4 YP; mix work with play.

• Table 10
  o Operations and Maintenance
SESSION IV: WEF HOD DIVERSITY & INCLUSION WORKGROUP
Scribe Notes By: Joe Pavoni Moderated by: Keith Hobson

- Working to increase diversity in both gender and ethnicity
- “Diversity is being invited to the party; inclusion is being asked to dance.”
- Group working to identify data needs, difficult because it is optional
- Survey questions sent to all MAs, received responses from 45 MAs in North America
- Results so far show that very little data is being recorded on diversity
- Develop promotional materials for membership initiative
- 17 MAs have initiatives to increase gender and ethnic diversity; 7 do not
- Recommendations include establishment of WEF Diversity & Inclusion Committee

WEFMAX Day II

SESSION V: PARTNERING FOR MUTUAL SUCCESS
Scribe Notes By: Shannon Lambert Moderated by: Lynn Broaddus

MA-WEF PARTNERING FOR MUTUAL SUCCESS
Presenters: Lynn Broaddus, Dianne Crilley & Kelsey Hurst
WEF Engagement Team

- Association Engagement
  - Self-serve (Plug & Play)
  - Leadership Development Resources
  - Membership Resources
  - Communications
  - Legal Resources
  - Public Outreach Resources
  - Marketing Resources
- WEF is now a fully staffed program
- WEF seeks a happy and healthy professional mutual relationship with MAs
- New objective: Partner with MAs for mutual organizational success
- What do you consider exclusively WEF’s roles:
  - Educational Tools for members
  - Membership management (data)
  - A clearing house/coordinator for MA’s to share with one another
  - Lead national discussion on policy
  - Education/Operator training
  - Magazine/Publications
  - WEFTEC
- What do you consider exclusively MA’s roles?
  - Metaphor of “Operation” board game: WEF is the body, MA’s are the individual parts
  - MAAs provide direct implementation of education
  - Member Outreach
  - Target State/Regional regulations and policy
  - Opportunities to network, especially on regional level
  - Often serve as face of national organization/the individuals that members know personally.
- Where do we intersect? What are the key elements of our successful partnership?
  - 2-way Communication – feedback loop
  - WEFLeader – consolidates information from both sources
  - Communication for collaboration
  - Recognizing members who are doing amazing things/awards program
- Why prioritize? Voted on WEF services.
  - Next steps – record results, present recommendations to Board.
- Learning outcomes - take away at least 3 ideas
- Engagement challenge
- Difference between local and national association (increase awareness)
- How does WEF raise awareness?
  - WEFTEC
  - specialty conferences
  - social media
  - awards
  - recognition
- How can MA raise awareness?
  - keep links up to date
  - free events for members
• discuss value of membership
• reach out to educational institutions
• awards and recognition program

• Understand local MA and WEF but don’t see value
• Compelling value
  • Look beyond typical benefit
  • Free members-only events
  • short surveys on items of interest
  • career coaching
• Member in name only
• Relevant offerings that are convenient
  • communication
  • send a welcome email or personal note
  • recognize new members at all meetings
  • organize community involvement
• I only occasional participate
• Relationship building
  • Leverage corporate members and sponsors
  • ask, engage, seek
• Participate in events but don’t volunteer
• Prospect and engage volunteers
  • invite them and bring them in
  • involvement is key to retain members
  • invite new members to board meeting
• Willing, fully participating volunteer
• Mobilize and groom volunteers
  • Provide volunteer on boarding
  • job descriptions
  • solicit people outside committee to help
• Recognize volunteers
• Willing fulling participation MA volunteer
• Leadership development
  • have a succession plan
  • board discussion regarding potential board positions
  • provide training, mentoring and coaching
• WEF membership team is available to help.

What is engagement? What do we do to not burn out current volunteers?

• Value in training
• Send information to home so they have additional time to read documents
• Social network - keep it fun
• relationships are important
• Challenge of benefits to operators - problems with employer support
• Issues getting operators to see benefits of membership
• Find the right spot for people that do want to be engaged
MA-MA PARTNERING FOR MUTUAL SUCCESS – Presenter: Keith Hobson

Brief intro on what the HOD MA Resources Workgroup is doing. Survey was sent to WEF Delegates for input on what are greatest needs for MAs and What resources can be shared? The four needs areas are identified below.

- Staffing
- Training events
- Financial planning
- Awards and program ceremonies

Gathering resources from MAs. Wrapping up in July. Report out to WEF in August.

WEF asked 3 MAs to share information on the resource listed below...

- **Kentucky-Tennessee WEA** – Webinar planning document and timelines
  - Implemented active webinar program
  - Committees lead webinar development
  - Have great response from membership. Free pdh and CEU without leaving office.
  - Free to all members
  - Must reach out to committee chairs to sign up
  - Spreadsheet self calculates dates for activities/deadlines.
  - Committee chairs pick topics and speakers
  - Executive Director introduces topic and provides announcements
  - 14-16 week timeframe for activities
  - 12-14 week approval for pdh and CEU approval by the state
  - Webinar setup form is filled out by committee chair leading the webinar
  - Include professional headshot of speaker
  - Minimize the words on slides. Promote use of graphics
  - 5-10 days out, conduct a webinar rehearsal to make sure audio works well
  - Prepare questions that can be asked to get the ball rolling in the Q&A section
  - Include survey at the end of the webinar
  - Ask presenter to provide a copy of the presentation for archiving on the website
  - Start 15-20 minute with speaker to make sure everything is working
  - Q: How do you keep track of participants?
    - Register in go to webinar
  - Q: How do you register several people on one phone?
    - Register multiple in go to webinar
  - Q: How do you make sure attendees are participating for full hour?
    - Honor system
  - Only give credit for live viewing.
  - Certificates can be issued through go to webinar
  - Questions that are required to answer to get credit. TX is using pdh questions that must be answered to get credit. Mostly used to confirm attendance.
Q: Is there a cost for go to webinar? Limit of number
  - $880/year
  - 101 participants
Q: How do you manage multiple viewers?
  - On-line form to complete giving credit for multiple attendees.

**WEA of South Carolina – Investing Options - Summary**
- Joint organization with AWWA
- $631,000 annual operating budget
- Operating cash reserve - $400k
- Didn’t have a long term financial strategy
- Need adequate funding for scholarships
- Fund endowments
- Earnings/dividends enough to support scholarships
- Strategy
  - Diversify
  - Hire financial advisor
  - Moderate to low risk
- Fully fund 1 yr operating cash reserve
- How to mitigate risk. Consolidated accounts
- Accounts need to be liquid
- General investment strategies
  - High standard of care
  - Cost of management of portfolio key consideration
  - Only paying 0.1% in fees
  - Commissioned based investment selected
  - Treasurer is lead communicator with investor
Q: Restriction in what can be invested in?
  - Establish risk tolerance. Investor will pick corresponding funds.
Q: NY holds quarterly calls with board. Removed investment in Waste Management and 3M due to environmental issues.

**Virginia WEA – Organizational Chart – Kathy Rabalais**
- Outlines segregation of duties
- Communicates leadership responsibility
- Illustrates lines of communication
- Can provide a picture of leadership succession
- 32 committees
- Board members are liaisons to committees
- Have a separate org chart for the annual meeting planning team. Review at every meeting.
o Post on web site
o Share directly after leadership transition
o Review during volunteer/leadership training
o Q: How do you communicate the chart?
  ▪ Website, e-mail

BREAK

SESSION VI: MEMBERSHIP
Scribe Notes By: Shannon Lambert Moderated by: Keith Hobson

WEF – MOVING PAST ATTRACTION TO ENGAGEMENT – Presenter: Dianne Crilley

• Learning outcomes - take away at least 3 ideas
• Engagement challenge – different people want to engage in different ways.
• Stairsteps of engagement
• #1 Difference between local and national association (increase awareness)
• How does WEF raise awareness?
  • Local MAs
  • WEFTEC
  • specialty conferences
  • social media
  • publications
  • awards and recognition
  • advocacy
  • fly-in
  • member acquisition campaigns
• How can MA raise awareness?
  • keep links up to date
  • ask members to promote MA on other websites
  • free events for members
  • discuss value of membership
  • reach out to educational institutions
  • partner with collegial organizations
  • awards and recognition program
• Understand local MA and WEF but don’t see value
• Compelling value
  • Look beyond typical benefit
  • Free members-only events
  • short surveys on items of interest
  • career coaching
• Member in name only
- 3,000 engaged WEF members
- Relevant offerings that are convenient
  - communication
  - send a welcome email or personal note
  - recognize new members at all meetings
  - organize community involvement
- I only occasional participate
- Relationship building
  - Leverage corporate members and sponsors
  - ask, engage, seek
- Participate in events but don’t volunteer
- Prospect and engage volunteers
  - invite them and bring them in
  - involvement is key to retain members
  - invite new members to board meeting
- Willing, fully participating volunteer
- Mobilize and groom volunteers
  - Provide volunteer on boarding
  - job descriptions
  - solicit people outside committee to help
- Recognize volunteers
- Make multiple contacts to potential volunteers
- Willing fulling participation MA volunteer
- Leadership development
  - have a succession plan at boar level for all volunteers
  - board discussion regarding potential board positions
  - provide training, mentoring and coaching
- WEF membership team is available to help.

What is engagement? What do we do to not burn out current volunteers?

- Value in training
- Send information to home so they have additional time to read documents
- Social network - keep it fun
- relationships are important
- Challenge of benefits to operators - problems with employer support
- Issues getting operators to see benefits of membership
- Find the right spot for people that do want to be engaged

WHAT DID WE LEARN... Provide 3 things your Member Association can immediately implement

- Committee involvement locally and at WEF.
• Personal phone calls to members
• Recruiting YPs for succession planning. Service projects to engage YPs
• Engage members to get on a committee (helps with succession planning)
• Give someone a defined role right away
• Encourage submitting articles to magazine
• Effective succession planning
• Welcome letter to new members
• Engagement
• Commitment from employer for new board member nomination process
• Providing defined role to new volunteers
• Publishing volunteer needs on website
• Engage university chapters for future leaders
• Having influential board members to reach out to companies to get support for volunteers
• Utilize technology using webinars
• Utilize go to meeting software
• Develop strong new member packages
• Mini-seminars – get completed in one day
• Hosting a YP summit – have committee chair attend to recruit
• Senior level involvement in support of YP engagement
• Leadership Institute at MA level
• Utilize coupon code
• Encourage vs ask people to volunteer
• Leadership terms defined
• Be intentional about who you reach out to as soon as they walk into meeting
• Work with neighboring states for design competition
• Be intentional about reaching out to diverse members
• Impose leadership terms – expectations that the vice chair becomes a chair