WEFMAX in Wrightsville Beach – May 23-25, 2018

WEFMAX Day I

WEF Business – Presenter: Jackie Jarrell

- Glad to be here; love the WEFMAXs; Great for learning and all the exchange that takes place
- Honored to be part of WEF; we all wear lots of hats-job, family, church, recreation, volunteerism, etc.; these things are the reason we volunteer and become part of associations;
- We should not take advantage of our water; we must allow others in future enjoy also; not an abundant resource
- WEF provides many resources and tools; involved in training; MA helps this to happen
- WEF - A COMMUNITY OF EMPOWERED PROFESSIONALS CREATING A HEALTHY GLOBAL WATER ENVIRONMENT
- Review of critical objectives and strategic plan –
  - Develop engaged and representative membership
  - Provide a broad range of content and programming
  - Increase public awareness
  - Promote innovation
  - Operate balanced and stable business
- Themes for WEFMAX – engagement; membership; workforce development; collaboration & partnerships
- WEF and MA experiences engage us...working to continue to do more, be more involved.
- The board is looking for feedback on what the needs of WEF members are; MAs are the conduit to get this information from the membership back to WEF
- Stockholm Junior Water Prize – 2 US students won the international prize
  - View 2017 SJWP video on YouTube
  - We need to encourage students at every level; consider the investment in this industry
  - WEF has tools and resources to provide education and outreach
- Young Professionals - Midyear Springboard program – any YP can apply to be part of this program
  - Integrates students into WEF
  - Interact with other individuals and WEF
  - YP Committee does community service project
- UNLEASH – innovative program where people come together from all over the world to create innovative solutions; it’s a competition; another opportunity for Young Professionals; team that won – take plastic out of the ocean and put in a closed loop system to create energy!!
- What can we do to get members engaged?
  - Mentor a student/YP
  - Hold networking events – WEFMax good place to get ideas
  - Encourage YPs to join the WEF YP committee
  - Encourage YPs to apply for the springboard program
  - Promote job opportunities
  - Start/support a student chapter (101 Chapters strong!)
- Engaging operators – what WEF is doing
OWWL – On-demand Wastewater Library;
- Ops challenge (been around for 30 years-WEF can help start one)
- Operator initiatives
- Training materials

- What can we do to support operators?
  - Support/start ops challenge team
  - Mentor ops challenge team
  - Encourage ops committee volunteers
  - Encourage volunteers to review technical publications
  - Share operator training and knowledge
  - Encourage volunteers to review OWWLs; WEF needs a lot of help with this
  - Let WEF know how they can help

- Utility Management
  - Partnership this last year with EPA; bringing workshop to various utilities about effective UM
  - There are programs being offered by WEF for MA UM/Finance committees

- Utility of the Future program – utilities have to stay in this program for three years; there are 10 components to becoming an effective utility management and several of them focus on becoming a utility of the future; WEF wants to help!

- Resource Recovery – WEF has a lot of resources on this topic as well; WEF is also looking for ideas from MAs and members on this topic

- LIFT – leadership innovation forum for technology;
  - Look over the website to learn about this; helps to take the research that’s been done and apply it in real life; scholarship program – LIFT See it
  - A lot of utilities have already been able to use this program

- Water Research Foundation
  - WERF joined with the Reuse Foundation to become WE&RF and has now become the **Water Research Foundation**
  - Water and Wastewater

- NGICP – National Green Infrastructure Certification Program
  - Storm water
  - Now have the first certified people in the program
  - Workforce development program
  - This program is expected to grow a lot

- WEFTEC – main ways to engage with all members at one time (End of September)

- What can we all do together to get people more involved?
  - Connect MA committee members with WEF committees
  - Connect with your WEF delegate
  - Ask WEF how to...
    - Exchange information with other MAs – at WEFMAX or other events
    - Provide WEF your ideas
    - Make the most of MA visits – we are there to listen, help and learn
  - Value of membership –
    - Lifelong learning
    - Workforce development
    - Innovation
    - Expert resources
- Rewarding experienced
- Training
- Advocacy
- Lifelong friends
  - Calendar of Key Events Throughout the Year
    - Includes webinars, SJWP dates, Water’s Worth It, etc.

**WEF’S Public Awareness Plan** – Travis Loop, WEF Staff

- Working to increase the awareness of impact and value of water
  - Permanently embedded in the strategic plan
  - Provide tools for MA and members to communicate the value of water to the public and decision-makers
- PATH FORWARD - Working not just to create awareness, but specifically in a way that increases funding
- Hired a new Sr. Director of public outreach that is working with task force members and others in WEF memberships
- Have created a 3-year roadmap
- Resources for MAs/members
- Calendar of Events: - on website
  - January – Webinar: Water words that Work
  - February – Resource
  - March 22 – World Water Day
  - April 16-18 – Water Week in D.C.
  - May 15 – Infrastructure Week
  - June – Stockholm Junior Water Prize Students Promotion
  - July – Webinar: Social Media
  - September – Resources & Webinar: Water’s Worth It
  - October 1 – Water’s Worth It RE-Launch
  - October 10 – Imagine a day without water
  - November 19 – World Toilet Day
  - December – Webinar: Media Relation
- Continuing to build content in the MA resource library; also looking for any opportunity possible for the materials to be co-branded between WEF and the MAs (including materials in Spanish and French where applicable); youth outreach toolkit
- Invitations and reminders for events will go out a month in advance of the event or activity
- Water Palooza Toolkit – hands-on activities for grades 1-5
- Value of Water Campaign
  - Making the case for infrastructure report
  - Annual public poll on infrastructure; heightened public awareness
  - [www.wef.org/valueofwater](http://www.wef.org/valueofwater)
    - Lots of resources in here including print-outs, infographics, bill stuffers, etc.
    - Available in several languages
- #mywaterlegacy challenge on social media
  - Every three months, there’s a new theme introduced; people are asked to share stories and photos that follow the theme and tag them with #mywaterlegacy
    - Quarterly topics are: mentorship; leadership and advocacy; community service; public education
• Planning a refresh of the Water’s Worth It campaign this year
  o Not changing the program completely, just a brief refresh and building off what was created previously
• More interactive, frequent posting on social media channels
• Live streaming certain events throughout the year as well
• Words on Water Podcast – each week, a prominent water leader is interviewed for the podcast
• National Water Policy Fly-In – April 17-18, 2018 in D.C.
• Becoming a water advocate; great way to learn about writing letters to elected officials, writing op-eds on water quality; giving presentations on water quality issues
• Twitter feed – Operator Ingenuity contest; other formats are available

**HOD Update** – Presenter: Keith Hobson

- 3 workgroups / relate to Committees
  o Membership relations (working on dues strategy)
  o Operator Workgroup
  o Student chapters
- 5 standing committees in the HOD
  o WEFMAX
  o Steering (new dashboard)
  o Outreach
  o Nominating
  o Budget

**Operator Workforce Strategies** – Presenter Catherine Curtis, BAYWORK

- CALIFORNIA – BAYWORK – Principles and Products ([www.baywork.org](http://www.baywork.org))
  o Founded in 2008-2009
  o What are we going to do about the “silver tsunami”? Lead to study and workshop; discovered this is a national issue
  o Started with 8-12 utilities; now 34
  o 30% of certified operators are over 56 years old; 56% are over 46 years
  o 38% of Garde IV and Grade V operators are over 56 years old
  o Certification exam passing rate for grades 1-3 are at 65-70%
  o Exam passing rate for grades 4-5 seems to be declining; only 15.5% of operators passed the most recent exams
  o Take away – the industry needs to invest more resources in helping existing operators pass the Grade IV and Grade V exams. The “Silver Tsunami” for plant operators is a concern
- More people are eligible for retirement every year; these are mission critical jobs
- Fewer students preparing to fill these jobs
- This is an opportunity to diversity the workforce
- BAYWORK: a regional consortium of both big and small organizations/utilities
  o Roadmap
    - Goal 1 – develop qualified candidates
    - Goal 2 – Provide staff with info they need to do quality work
    - Goal 3 – Modify work processes to optimize use of available staff
    - Goal 4 – Maximize cost-effectiveness of workforce reliability investments through collaboration
  o Mission Critical Jobs (Top 3)
- Electrician
- Wastewater operator
- Electronic maintenance/instrument Tech
- Water Distribution Operators
- Engineers
  - BAYWORK Principles (Baywork.org)
    - Research based action
      - Build a good foundation (Brochure for high school students)
      - Take it to the next level
      - Make the connection
    - Continuous innovation
    - Cost-effective through collaboration
    - Knowledge-sharing among peers
    - Commitment to the industry as a whole
- Career Pathways Project
- Recommendations
  - Increase awareness of industry and trades
  - Increase readiness of youth and other job seekers for trades
  - Increase classroom training capacity
  - Increase entry level job opportunities for mission critical positions
  - Address financial barriers to training leading to the trades
- Continuous innovation
  - Workshops on wheels – rent a bus with 50+ people and go to 4-5 utilities that are in the same region to see new technologies; good opportunity for networking and learning
  - Workshop on effective use of technology
- Knowledge transfer toolkit – case studies, videos, How-To Guidebook (E-Book)
- Baywork training buffet – collaboration among utilities
  - Pick and choose classes
  - Instructors from many classes
  - Curriculum for a day (sort of a mini conference with concurrent sessions) that provides contact hours, for Utilities by Utilities
- Utility/NGO Collaboration
- Collaboration with community college system
  - Internship guidebook
- Website resources page – www.baywork.org
- Lot of local work including job fairs
- Check out www.baywork.org for lots of the information that was presented in the slideshow

Q&A:

- Website resources page – www.baywork.org
- Lot of local work including job fairs
Operator Workforce Strategies – Presenter Steve Harrison

- Wastewater Fundamentals and other Operator Training Resources
- Partnered with ABC to produce new manuals
  - Utilizes WEF publication
  - Reflects current knowledge
  - Peer reviewed
  - New game-changing education
  - New manuals are much more graphics-intensive (there are 2)
  - Vendor-supplied graphics and real-world photos all printed in full-color
  - Pond Biology showing links between organisms
  - Accessible language – targeting a 6th-grade reading level
  - Relatable analogies/explain complex topics (bacteria as combustion engines)
  - Definitions within main text
  - Each chapter designed to be stand alone
  - Step-by-step math examples
    - Use ABC formulas
    - Worked out in metric and universal units
  - Lots of practice questions/exams (2-4 multiple choice per page of text)
  - Scenario worksheets
    - Real world operational problems
    - Complex solutions with multiple steps
    - Operator must draw conclusion from chapter material and apply
  - Chapter summary guides – quick reference
  - Companion online training course that goes along with the manuals
    - WEF is applying for CEUs to be validated for course time and progress in the online system
    - SCORM compliant tracking
    - In Beta mode

- Operator Education – manuals & study guides (3); On-demand Wastewater Library; operator essentials; distance learning
- Operations-focused publications
  - Activated Sludge and Nutrient Removal
  - Basic Lab Procedures for the Operator-Analyst
  - Micro Life
  - Operation of Nutrient Removal Facilities
  - Companion to the Operator-Analyst
  - Released at WEFTEC 2017

- Visit the Bookstore – Please let me shop
- Visit the Archive

Q&A:

- Explain what Operators Challenge is for those who aren’t familiar with it.
- Where does a Utility start to create a team?
Do you have any materials to give to career advisors at high schools to encourage water industry instead of college careers? Is there any way to share information to create high school curriculum for associates program in water industry? (Career technical education)

SESSION I: MEMBERSHIP
Scribe — Carolyn Ross

New Jersey Water Environment Association — Presenter: Robert De Block & Lisa Oberreiter

- North Central, South Jersey Sections
- 2,315 members as of 5/21/2018
- PWO 1,250, Professional 900
- All members required to be WEF members
- Opted out of UPP
  - Ensure members feel ownership of the NJWEA
  - Opted out of WEFTEC Membership
- Exhibitors do not have to be members
- Constantly reviewing dues, not raised in last 7 to 8 years
- Reduced dues to $10 for students and YP’s
- Volunteers lead the way and carry the load
  - Low overhead
- Sponsorships – help offset costs
- What sells our Membership
  - Training and Continuing education is best seller
  - Annual Conferences
  - 33 Program Sessions
  - Two technology transfer seminars a year, 1200 attend annually
  - Mini Workshops, $17 to $18 registration fee
    - Response to Rural Water changing strategy
    - Offer best quality, cost effective programming
    - Opportunity for operators to attend local classes
- Make it fun, networking, and include family
- Current Initiatives
  - New public education booth
  - NJ League of Municipalities
  - Science Teachers
  - Public Education Literature
  - Regional Science Fairs
    - All winners receive Student membership
  - Poster Competitions
  - Middle Schools
    - Essay Competition
    - River Cleanup
- Scholarships
  - Provides $77,000 in scholarship to students each year
- Academic
- Operator Training
- High School to Ivy League
  - All Scholarship applicants receive a Student Membership
- Planning for the Future
  - Continual review of WEF membership requirement
    - Cost/Benefit Analysis
      - Programming for Attorneys
  - Always growing
    - Improvements to and New Committees
      - Formalized PE Committee
      - O and M Committee
      - Philanthropic Committee
    - Student Design committee
    - Technical Programs and Plant/Factory tours during Section Meetings
  - Utilizes WEF membership information to help target new members
    - No dedicated membership recruitment
    - However, they reach out to new members with committee information, welcome email, resources available
  - YP’s allowed to present at annual conference

**Q&A (New Jersey membership)**

- What are you doing to grow membership?
- Do you allow students to make presentations at your annual conference?
- Effective strategies to co-exist with Rural Water as environment gets more competitive?
- Can you provide a little more clarity on the mini workshops?
- Have you tried to obtain Federal funding as Rural Water has?
- Any issues with employers where unions exist?

**OHIO WATER ENVIRONMENT ASSOCIATION** – Presenter: Fred Smith

- “Pains” of transition – position for future growth
- Divided into 4 sections; each with staff and delegate
- 2000 members +
- 12-member board
- Problem – had strong executive admin.; in good financial position; didn’t require much oversight; she retired; hired in new person; outstanding bills increased; no financial updates; EPA contacted notifying problem with training hours; administrator dismissed;
- Bigger problem – contact hours affected over 600 operators; worked with EPA and to correct; bills were paid; board did review of financials and found that decisions had been based on balances that were not updated; in poor financial position; led to lack of confidence in central office
- Plugging the leaks – hired temp; got contact hours organized and submitted; Pres. Worked with EPA on this; kept board and membership updated; rebuilt financial records in quickbooks; filed taxes; remaining staff held the ship together.
• New Exec. Administrator – looked at various other associations; changed review criteria; more focus on non-profit management, law & finance;
• End of the Storm – hired new admin; received final resolution of contact hours with EPA; completed accounting overhaul
• Lessons learned – if it seems off, it probably is; oversight is prudent; training and involvement of Executive Committee in key areas of the organization; improve procedures; change and problems can lead to opportunity; non-profit experience of your lead staff is important; ask questions
• Onward and upward – strong association background; refinement of contact hours; increased financial transparency; revise EC duties; rebranding
• Dawn Kennedy; Meagan Borrow; Chelsea Smith

**WEFTEC MEMBERSHIP RECIPROCITY DISCUSSION**  
**Pilot Joint Recruitment Campaign – Presenter: Keith Hobson**

- Goal is to encourage WEF membership and enhance MA membership
- Developed from requests at WEFTEC 2015 Leadership Day
- Membership recruitment initiative -
  - Went to WEFTEC and signed up for a membership to WEF; they were given the membership for a year
  - Way to ask people at WEFTEC who are not WEF members
  - MA’s had to choose to be a part
  - 32 MA’s participated
  - 351 new joint WEF/MA members
  - 10 MA’s gained 10+ members
  - Majority of new members from US
  - Average 11 new members per participating MAs
  - See blue sheet – MA Reciprocal Membership Plan, rolling out at 2018 WEFTEC
  - Goal is to have outreach in both directions
  - MAs will have opportunity to provide WEF membership
  - Pilot program building on member recruitment
  - WEF will provide – welcome email and new member letter; exit survey

**Q&A**

- Doesn’t understand why the person paying the fee isn’t receiving the actual membership?
- Is that operator level for all individuals that work in the Plant? Is there an opportunity to have a separate type of membership?
- Can the MA be placed first on the WEF website for selection of payment of memberships?
- Is there a code for students to register for a free membership? An Online application that’s simple.
- Did you track individuals that were qualified, but states didn’t participate?
- What is the start date of the Reciprocal program?
- How will program develop moving forward?
- What % of membership is paid for by an employer? Is there any additional information about organizations that aren’t paying for memberships?
- Is there any way to put together an employer speak document about member benefits?
- Is it cheaper to become a member of WEF and then register for WEFTEC?
- How many non-members attend WEFTEC?
What other things are we doing to encourage students to join WEF and participate?

WHAT DID WE LEARN...summarized by WEF Delegate Scott Aurit

- Working with local colleges to add Programming for operators etc.
- New Jersey imbedding membership cost into conference costs
- What is the target audience?
- Leverage LIFT to engage operators better.
- Have scholarship be a part of membership.
- Providing a free membership to members that are paying out of pocket...i.e. professors.
- Are there faculty members that can promote membership and share benefits of joining.
- Offer workshops to faculty at WEF to learn how to better engage students.

SESSION II: ENGAGEMENT

OHIO WATER ENVIRONMENT ASSOCIATION – Presenter: Fred Smith

- Process they went through to hire executive administrator – Ohio WEA has:
  - >2000 members
  - 12-member EC
  - 8-year rotation
  - 3 hired staff positions
    - Executive Administrator
    - 2 Office Assistants
- Realized they had problems – lessons learned
  - Redefine strategic initiative, where they wanted to go next
  - Former employee had 10 yrs. with experienced executive admin
    - Strong financials
    - Well established procedures
    - Didn’t require much oversight
  - 2016 – Promoted internally for new E.A. after retirement of previous employee
    - Had worked with OWEA for 5 years prior
    - Hired two office assistants
  - Discovery Mid 2017
    - List of outstanding bills increasing
    - Struggle to get updated P&Ls
    - Defining event 8/2017
      - Contact hour issue with OEPA
      - Immediate termination of Executive Administrator
  - Problem was much larger than realized initially
    - Contact hours record keeping issues had potential to impact licenses of over 600 operators
    - Large amount of unpaid bills – increased as review began
    - Limited financial records in 2016 and 2017
    - Balance was shrinking
      - Outstanding bills
      - Decisions based on previous balances
Lack of confidence in central office

Plugging leaks
- Temp admin staff hired
- Worked with OEPA on contact hour issue
- Rebuilt financial records/paid outstanding bills
- Business as usual on events and member services
- EC members volunteered a lot of time
- Remaining OWEA staff carried on with business

Search for new EA
- Advertisement
  - WEF website
  - Ohio association of nonprofit organizations
  - Association of fundraising professionals
  - Additional option: American Society of Association Executives
  - 25+ resumes
- Candidate review criteria
  - Salary Expectations
  - Non-Profit Management
  - Non-Profit Law/Finance
  - Previous non-profit experience is key
  - Wastewater experience not required
  - Quickbooks/Accounting
  - Training/Recordkeeping
  - Social Media
  - Membership
  - Employee Management
  - Event/Meetings Coordination
  - Can be “voice” of OWEA

End of storm
- 1/2018 - hire new E.A.
- 2/2018 - final resolution of contact hours with OEPA
- 3/2018 - completed accounting overhaul

Lessons learned
- If something seems off it probably is
- Even when things are good, oversight is prudent
- Training and involvement of EC in key areas of organization are key (membership, finances, contact hours)
- Procedures can always be improved
- An abrupt change and problem can lead to opportunity
- Non-profit experience of your lead staff is important

Onward and Upward
- New EA with a strong association background
- Refinement of contact hour process, including updates to written SOP
- Increased financial transparency
- Monthly 3rd party review
• Chesapeake had similar situation – and has faced similar challenges – Virginia Beach changed sponsorship program – recommends reaching out to Ohio for examples.
• OWEA – a lot of infighting regarding salary for EA.
• New England – similar situation but smoother transition. Professional recruitment services after retirement of two employees – 18 month effort on recruitment process
• NY for the last 7 years has had outside financial firm to audit books on a yearly basis – very much worth the cost – money well spent

NEW ENGLAND WATER ENVIRONMENT ASSOCIATION – Presenter: Fred McNeill

• NEWEA 2018 Annual Conference & Exhibit Highlights (video)

Member Engagement

• NEWEA at a glance
  o Founded in 1929 (89th year)
  o 2,200 members
  o Annual Conference, Spring Meeting, and Committee Specialty conferences (6) – January, Boston, 2400 attendees
  o Spring Meeting – June, rotates among states, 350 attendees
  o Affiliated State Associations (7), Legislative Engagements
  o Operations Challenge
• Volunteer Opportunities
  o They have 6 councils and over 40 committees – ad hoc committees as well
  o Board members are on the councils and serve as liaison to the executive committee
  o Chairs turn over every 3 years
• Initiatives
  o Student Outreach – goal to impact 5000 students
    ▪ Presentation Tool Kit K-12 created by Public Education Committee
    ▪ Teacher training annually to sit down with them and discuss water industry
    ▪ College and university initiative
      • executive committee meeting at one of the colleges or university every year
      • student chapters
      • outreach events
    ▪ Committee charge revision – student outreach (each committee must do one activity)
    ▪ Recommend having a career day at schools
  o YP Summit
    ▪ Initiative from 2016 NEWEA planning session
    ▪ Modeled after WEF’s YP summit
    ▪ Half day program that’s part of annual conference
    ▪ YP’s plan, organize, and stage the event
    ▪ After the event there’s a networking reception with members, also after the Executive Committee Meeting
  o Mentor Program
    ▪ Introduced by YP committee at 2018 AC
    ▪ Match mentors with mentees for an 18-month program
    ▪ Lead to lifelong relationships
    ▪ Develop future NEWEA and industry leaders
Poo and Brew
- Developed by YP committee – 12 to date
- Plant facility tour followed with a networking session at a local micro-brewery
- Currently planning for the 13th event
- Attendance is typically around 40 people
- Technical knowledge transfer
- Networking
- Relationship building
- Fun

Veterans Workforce Development
- Idea presented by USN veteran and Maine plant manager Dustin Price
- Water Warriors white paper
- Create awareness of water infrastructure jobs
- State subcommittees and liaisons
- Meet with regulatory legislature
- Lifelong career
- Connect veterans with job opportunities
- Create awareness of water infrastructure jobs
- Established an ad-hoc committee in 2017 with state subcommittees and liaisons
- Four step processes – recruitment, placement, training, and certification

Innovation Task Force
- Innovation pavilion similar to WEFTEC
- Connecting with colleges and universities on research programs
- Started in 2017 and continues to evolve
- Innovative technologies and trends
- Entrepreneurship
- Workforce development
- Charge is evolving

Q & A
- Trying to get more YPs that are operators – how do you get the utility buy-in to allow this? No solid strategies – grass roots effort
- Teacher training – how did you get started reaching out to teachers? Passionate members, people with true passion for the industry.
- New Jersey – last year took booth to NJ Science Teacher convention – have found a lot of teachers set in their ways but realized at this convention that they should offer teachers free day at conference if they want it. Teachers were interested in programs – they did not know many existed. Fledgling effort with potential for big impact. Specifically targeting certain audiences.
- NY has tried to get regulators to their meeting – but there is tension that exists between municipal employees and regulators – how do you get around that? Reduced registration for one sector but not all?

WHAT DID WE LEARN…summarized by WEF Delegate Karen Pallansch

Jackie Jarrell asked the group to think about two questions listed below as they begin their table talks...

1. What are main takeaways from last two Engagement presentations?
2. How can WEF help your MA related to the topic of engagement?
15 minutes of table discussion...

- Oversight, cross training, and long-term planning are key
- WEF roles in helping MAs in trouble
- Providing resources for the hiring of EAs in the future – difference in EA and Director – general SOPs
- Helping operators in getting into MAs
- Connection between MA committees and WEF committees and enhance definition of roles and responsibilities of officers
- Don’t give 501c-3 away – get someone that knows how to do it
- Look for non-traditional roles in treasurer like utility fiancé and can do for a few years – zero in on what can be done.
- Science teacher conference
- Key performance indicators
- Good links for WEF info
- Links to other Mas so we can see all the cool stuff going on
- WEF develop app or video game to help train operators and YPs and students to solve real life problems – Clash of Clans style
- Ops challenge does process simulation to problem solve – could be start of app or game
- WEF do MA audits or checklist of good practices – one way is to use visits by board reps to Mas
- Recruiting veterans – WEF offer scholarship for vets – task force for WEF to offer complimentary scholarships for Mas – member types being reviewed.
- Navy good resource and veterans’ organization
- MA job bank along with WEF
- YP and Poo Brew
- YP have seat at table and be involved in goings on and transitioning out into other committees.
- Help with hiring staff – long term budgetary help.
- Mr. & Mrs. Fish
- Hiring professional videographer – great way to market organization to utilities
- Have different length version of video for ADD and longer attention folks.
- Teacher programs
- Innovation Pavilion at local MA shows
- Volunteers with passion get things done
- How to get more volunteers to help carry the load
- Outside consultant to help with recruitment of ED
- Help with best practices on hiring ED, salary, wider range of places to recruit
- Share from other MAs who have been successful in recruiting or outside recruiting consultant
- Is there a better way to use WEF website for info sharing and other ideas?
- So, I’m a WEF Member, now what? Videos or something that can inform. Help remind people ways to plug in – webinars are easy tool.
- WEF.COM – would be helpful to be able to peek into other discussions of committees that you may not be on.

SESSION III: WEFMAX HOST SESSION

Scribe – Kara English
• Introduction of Jennifer- from NC, 10 years of non-profit, 15 years of brand building, currently the Education Services Manager for NC AWWA-WEA
• Image definitions from Webster.
• Game on Branding
• ID companies based on good facts and then bad facts. People tend to only remember the bad.
• The importance of image
  o Not just a logo
  o A collective of: what you have heard, seen about them in the media, personal relationship
  o Image is a lot like water- very fluid
• Why Reinvent?
  o Bad image (you have to do something to turn it around)
  o Image is stale
  o Change of direction in the company
• What does it take?
  o Teamwork
    ▪ Establish a diverse team that can commit to the timeline
  o Time
    ▪ Set realistic goals, but SET THEM
  o Deep Dive
    • Mission
    • Demographics
    • Target Audience
    • Marketing Analysis
    • What is salvageable?
  o Implementation
  o Don’t overthink it!
• Old Spice Branding Strategy Example
• National Geographic Example
• Amazon expanded from books to selling everything
• Legos expanded their product base
• Netflix
• What do they have in common?
  o Understood the need to revamp
  o Understood that revamping didn’t mean reinvention
  o Took what they knew and grew- back to the basics!
  o Simplified the brand
• Locally- What did we do?
  o 2014- AWWA Rebranding
    ▪ Took the opportunity to revamp
    ▪ Deep dive into what we wanted to represent
  o Findings:
    ▪ Logo needed an update
    ▪ Brand was good but stale
• Needed to breathe new life into the brand
  • Updated publications
    o Events are now themed (last year was baseball themed)
    o Revamped programs
    o Activity- Who Will You Be?

• What could go wrong?
  o Fixing something that already works- Tropicana
  o Going to Simple-Pepsi
  o Going Too bold- Olympics
  o Not paying attention to your audience- Dr. Pepper

• Final Thoughts
  o Rebranding comes in many forms
  o Rebranding is not for everyone
  o Take your time and set goals
  o Avoid going too fast and falling into pitfalls

**HOD DIALOGUE SESSION IV**— Moderator – Keith Hobson

_Scribe_ – Connie Raper

**OPERATOR INITIATIVES WORKGROUP** – Presenter: Fred McNeill

• Brief report on history
  o WEF Vision - Essential to water professional around the world
  o 2016 Task force
  o ABC – accreditation/reciprocity
  o HOD – Operator Workgroups (surveys/White papers)

• Goals – Board Taskforce

• Advisory Panel – 14 expert volunteers and 2 staff

• Final output
  • Operator Ingenuity Contest awards ceremony
  o MA operator initiatives
    • Student post competitions
    • Testing service with ABC
    • Pilot WEF/MA partnership
      • Operator help line
        o Regional training sessions
      • Operations challenge
        o Promotes in local media, family barbeque
        o Subsidizes teams
• Operator ingenuity award

• What can you do?:
  o Promote WEF Operator ingenuity contest
  o Host MA contest
  o Help write and review the OWLS

• Looking for input from group –
  o How do you engage your operators?
    ▪ Training and networking at conferences statewide
      • Quantity
      • Quality
      • Diversity
    ▪ Veteran workforce imitative
    ▪ WEF memberships
    ▪ Provide WEF library
    ▪ Operations challenge
    ▪ Set up events and make sure they can attend (identify champion)
    ▪ “FREE” training
    ▪ Membership in association required as condition of employment
    ▪ Target operators to be in chair positions of boards/associations
    ▪ Regional training sessions – keep cost low and have good meal
    ▪ Send invites to all operators to attend meetings
  o How do you train and develop your operators?
    ▪ Classes at conferences
    ▪ On job training
    ▪ Apprenticeship
    ▪ District meetings
    ▪ Quarterly lunch & learns
    ▪ Train boards to understand necessity of training
    ▪ Move training to various areas in the state for more opportunities
    ▪ Operator exchange among utilities – write article for publication
    ▪ Operator associations; scholarships
  o How do you promote the operator profession?
    ▪ Awards at state level
    ▪ media recognition
    ▪ elected officials
▪ Social media
▪ Promote value of water
▪ Promote value of profession
▪ Engage students
▪ Conference, competition, operator spotlight in publication
▪ Recognition and awards for individuals and facilities
▪ Presentations in front of councils and boards
▪ Have a water/utility/operations week/day
▪ Enter VAC Con truck in local parade
▪ Attend funerals of public works employees when they pass on
▪ Have operators write articles for publication
▪ Write letters to councils and legislators
▪ Public relations puts out news release to local paper for awards and present awards at council meetings

WEFMAX Day 2

SESSION V: WEF SESSION

Scribe – Carolyn Ross

COLLABORATION AND PARTNERSHIPS – Presenter: WEF Vice President, Jackie Jarrell

▪ What does partnering mean? Two parties making a commitment-partnership. Each person has a part.
▪ A community of empowered professionals creating a healthy global water environment.
▪ Most critical partners are MA’s, Looking to each MA to give feedback and share information
▪ Partnering for Impact! 2016 – what can we do together? How can we make an impact partnering with other groups?
▪ If you want to go fast, go alone. If you want to go far, go together. African Proverb
▪ There are times when each way has an advantage – alone or together.
▪ Partnering isn’t a new idea – plenty of summits and conferences have been partnered.
▪ Partnership can help change culture
  ▪ Increase efficiency
  ▪ Innovation & creativity
  ▪ Continuous improvement
  ▪ Reduce inertia
  ▪ Build community
  ▪ Good for business
▪ True partnerships take work
  ▪ Benefits
  ▪ contributions
  ▪ alignment
  ▪ communication
You must understand your goals and values and understand your partners goals and values. Do you have a common vision?

Because of different philosophies, projects move in different directions. Risk is carried differently because of different insurance.

Board is meeting with officers annually discussing what we can work on together. Determine where proceeds go.

Collaboration with AWWA – could do better; get stuck in doing the same things always been done

EPA is a new organization we could look to

There must be a clear definition of what each party is going to receive out of the partnership

Things you should consider when adopting a partnership
  - Scope of work
  - Money-how to split revenue and who will split the loss if there is one
  - Insurance
  - Branding/marketing/etc.
  - Schedule
  - Who will be reviewing contracts and signing them?
  - Who owns the attendance database? Controlling the database and how it is being updated
  - Organizational Structure-who is charge, conflict resolution
  - Promotional deals

Partnership with AWWA and why it is confusing
  - AWWA is organized differently than WEF, the association is telling the sections what to do, due to them being a 501-C3, they don't want to lose their status
  - They organize finances differently
  - There is not a right or wrong structure, but we must understand both organizations structures, so you can move forth and partner together

If you are trying to partner with an organization and have hit a road block, you are able to call Scott Wilson, WEF with questions. Scott has a wealth of information on partnering and collaborating with other organizations. AWWA also has someone to help.

Some MA’s have had hard a time partnering with other organizations due to lack of obtaining bank accounts, etc.

When collaborating with other organizations, to not plan an event over the top of one another

Collaborating with partnerships can become a struggle when one organization has paid staff and another does not

Partner with other organization by offering member pricing for their members to your events a visa versa

BEING A WATER ADVOCATE: NOT AS HARD AS YOU THINK! – Presenter: WEF Staff, Travis Loop

- Grassroots lobbying is aimed at persuading members of the general public to contact their legislative representative
- Individual lobbying is not as strict as you think, you have freedom of speech
- Some employees are government employees and have code of conducts; therefore, those members may not be able to advocate for certain topics
- Water Advocates Program brochure has glossary of common terms
- Why Grassroots Advocacy?
As stakeholders, we have a right and responsibility.

Current political climate
Fractured Sector
Diluted voice

- Build relationships with your local officials-this is grassroot
- Doesn’t have to be a large national movement, can be in your region
- Asking attendees to the fly-in to advocate for increase on certain budgets
- Tax Reform and Job Act, advocating to try and fix the bonds to fund fixing existing infrastructure and restricting the bond
- Trump’s infrastructure package provides a 20% grant for new infrastructure, but limits funds federally and puts a lot of pressure on the local government to fund the majority
- WEF is asking to revise and have more money for SRF, WEF has made a called to action for water advocates to send letters to congress
- WIFIA, WEF is asking to double the funding for both programs
- WIFIA, new program allows states to submit for money for infrastructure
- Water advocates have made changes, and supported WEF on their call to actions and have made changes
- DC Wipe Law was going to be completely cleaned, and a lot of push back happened, and congress decided to not move forth
- Water is not high in the political climate, and unless we are engaging with elected officials, they do not understand us or our goals

Examples of grassroot activities
- Calls
- Letters
- Fly-in/Drive-In/Walk-In Events
- Social Media
- Facility tours and site visits

- If your MA is wanting to start a program there are objectives you can put in place
  - Teach participants how to effectively communicate with target audiences and stakeholder groups
  - Explain the importance of grassroots advocacy and elements of a successful program
  - Establish your goals and messages
  - Assess resources, manage expectations, and determine timing and strategy to maximize effectiveness
  - Provide framework for interacting with the media and elected officials
  - Offer mock sessions to talk with individuals
  - Media Training, stay on message and not derail
  - Empower participants to use social media to impact decision makers
  - Offer incentives
    - Prizes for the most engagement
    - Scholarships
    - Bling
    - Recognition

Digital Advocacy-persuading political figures using a digital format
- #OccupyWallStreet
- #BlackLivesMatter
- #MeToo
- #NeverAgain

- Social media influences, inspires, and impacts
• Water Advocates page
  o Cqrcengage.com/wef/waterinfrastructure
• Other ways WEF encourages you to get involved
  o #MYWATERLEGACY Challenge – Way to provide WEF members to tell their stories
• You can go online and send a letter in as little as 5 minutes via WEF’s resources
• Other Resources for Digital Advocacy
  o Thunderclap
  o Water Advocates
  o Resistbot – text RESIST to 50409
• Water Advocates Program
  o New Website - https://www.wef.org/advocacy/water-advocates2/
  o Water Advocates Toolkit that was given out onsite can be downloaded

Other MA’s Experience

• NEWEA Experience – Patricia
  o Advocacy is important to help address new regulations that impact different areas

• Kentucky-Tennessee WEA – Grassroots Advocacy Successes - Valerie Lucas
  o Hosting WEFMAX April 24-26
  o Hired liaison for Kentucky and Tennessee
  o Fund one person per state to attend Water Week
  o Worked with AWWA to spread message
  o Great opportunity to realize we have a voice and can make an appointment to talk with our elected officials

• Ohio WEA’s Grassroots Advocacy Successes – Dale Kocarek
  o Recommends Fly-Ins for all advocates to understand importance of partnering
  o Welcome surprise to learn that Capitol Hill prefers lay advocates
  o Leverage resources that WEF allows MA’s to do, i.e. letters

Q & A

• How is liability handled when both organizations partner? Each MA handles it differently. Sometimes each bring their own liability insurance, or there may be an agreement that one will hold the insurance risk.
• How do separate organizations split costs between the two? Each MA is different. Some split 50/50, others may have an agreement of one organization getting more than the other based on # of members, exhibitors, sponsors etc..
• What is WEF’s perspective on US Water Alliance partnership? WEF works collaboratively with the Alliance on projects of shared interest. We participate in their reports and briefings through both financial contributions and expert consultation. WEF also supports the Value of Water campaign, which is administered by the Alliance. We will continue to find ways to work together.
• Does it behoove us to pick our battles when advocating with elected officials? There are many "non-traditional" policy issues that impact the water sector, for instance Clean Air Act provisions, labor policy, and tariffs on imported steel and aluminum. While it would be ideal if we could focus our energies on issues that directly affect our sector, sometimes it’s important to weigh in on the other stuff too because it will help policy
makers make balance decisions. Time is precious to grassroots advocates, so it’s important to the staff and association leaders identify the important issues to weigh in on and make it as easy as possible for advocates to convey the right message.

- **Who keeps track of lobbying limits in MAs?** The MA needs to keep track of its direct spending on lobbying as part of their budget process. The permissible spending limits for lobbying are generous relative to the size of the typical MA’s budget. Of the amount spent on lobbying, up to 25% can be spent on supporting an MA’s grassroots program.

### SESSION VI: WORKFORCE DEVELOPMENT

**Scribe** – Amber Medlin

**ROCKY MOUNTAIN WATER ENVIRONMENT ASSOCIATION** – Presenter: *Stacey Walker*

**Supervisory Leadership Certificate Program**

- Program designed specifically for water and wastewater industry operators, leadership development program; the future of leadership in our industry depends on competent, motivated and knowledgeable leaders.
- Program targets:
  - Rising start in the utility industry
  - Supervisors
- Structure
  - 8, full-day sessions
  - Twice a month (back to back)
  - 4 months in duration
- Components
  - Executive panel
  - Activities & simulations
  - Presentations
  - In-class discussions
  - Readings
  - Assessments
- Classes
  - Self-awareness
  - Communication
  - Role of the supervisor part 1, 2, & 3
  - Organizational culture & leadership styles
  - Executive panel
  - Putting it all together – presentations and graduation
- Consistent and diverse attendance
- 230 graduates to date from three states
- Professional Facilitators:
  - Richard Gerstberger, Tap Resource Development Group
  - Karen Main, Innovations in Training
- Financials
  - Self-supporting
    - Pay facilitators
• Meet and use space at utilities to reduce costs
  o Fee
    ▪ $1,699 for members
    ▪ $1,899 for non-members
  o Joint program of RMWEA and RMSAWWA

• Trying a 2-day program in 2018
• 4-4.5 training units
• Very diverse group of students in each course
• Personality assessment is a part of the course, due to leaders needing to know yourself and understand each other
• Books also accompany the course
• Attendance around 18-23
• The program is self-supporting
• Pay facilitators, and use utilities to hold the course
• Joint program with RMSAWWA

Q & A

• Questions regarding how to get your utility to foot the bill for this training. – The utility sees value in having an outside source provide the training. The benefits have proven strong and the utility continues to send more each year. Utilities take on expenses of student; student may have some cost of hotel and travel.
• Would the facilitators be willing to share the program? Not sure. RMWEA and RMSAWWA bought the curriculum however the facilitators own it. The curriculum was designed through collaboration with facilitators and with a committee to develop it.

CHESAPEAKE WATER ENVIRONMENT ASSOCIATION - Presenter: John Fletcher

Baltimore Water Mentorship Program “How did it get started?”

• Overview
  o What is the problem?
  o How did we find solution?
  o Who was involved?
  o What was solution?
  o Did it work?
• Two problems
  o Unemployment
  o “Graying of the work force “
• One Solution (March-December)
  o Initial team identified from CWEA and DPW
  o Multiple meetings for game plan
  o Look at high school and trade school base program
  o Identified additional members
• Chesapeake Water Environment Association (CWEA) Maryland, Delaware, D.C
• City of Baltimore
  o Founded in 1729
• Pop – 625,000
• Director Rudy Chow
• Wastewater – collection & treatment
• Water – distribution and production
• Solid water
• Storm water
• Average age 75-80 years

• YH2O
  • Partnership mayor and city council
  • Director MOED
  • Youth Works program
  • Hire One Program
  • Phase I – recruitment (January-Feb)
    ▪ Recruits or more (17-24)
    ▪ Conduct assessments of youth
    ▪ Code of conduct and good business practices training provided
    ▪ Multiple presenters provide participants with an overview of the water industry and career opportunities
    ▪ Provide training sessions for those professional interest in serving as career mentors
    ▪ Interview panel conducts formal program interview for final 15 participant selection
  • Big Brothers and Big Sister of the Greater Chesapeake
    ▪ Managed mentor application process
    ▪ Interviewed participants
    ▪ Matched the participants and mentors
  • Phase II – industry Exposure (March – June)
    ▪ Take part in a safety training workshop
    ▪ Meet twice a week for a total of eight hours a week to receive:
      • Job readiness sessions
      • Water industry career exploration activities
      • Worksite tours
      • Job shadowing experiences
      • Guest speaker lectures, etc.
    ▪ Match up the career mentors
  • Phase III – Industry Job Experience (June-August)
    ▪ Participants placed in water industry positions through Hire One
    ▪ Attended the APWA Heavy Equipment rodeo
    ▪ Mentors connect with participants
    ▪ Job fair to connect participants with water industry employers
    ▪ Participants interviewed with municipal and private companies

• Phase IV – Career Placement (September)
  • Identify and start of a long-term career in water industry
  • DPW hired of 17
  • Consultant hired the 15th

• Leadership lessons
  • Recognize problem
  • Identify the right team
Push for action
Driver’s license
Review and improve
Know your audience – may need to use alternate communication techniques
DPW may implement in other areas

Q & A

• Are graduates of this program returning as mentors? Or to further their skills? - Yes.
• Do they provide training to coaches and mentors on how to become a mentor? – Yes. Started with Big Brothers/Big Sisters program.
• Problems with mentors/mentees traveling outside of Baltimore? Lesson learned that if the participants travel outside of the inner city they tend to have issues. A new phase of training may be required to help participants in this area.

WHAT DID WE LEARN...summarized by WEF Delegate Leanne Scott

• How to handle basic professionalism – employability skills – what are the expectations of not only the department of public works, but also outside industry.
• Connect program mentors to employers
• How do we celebrate this and get the message out?
• What can WEF do to help?
• Need to consider alternative employees
• Work with technical schools to develop curriculum.
• Internships for high school and college students.
• Get to the parents – let them know their kids don’t have to have massive college loan debt – there are vacancies and positions in our industry.
• Training at tech schools – mechanics, electricians, etc.
• How to get our own staff to see themselves as professionals. Elevate the careers in the eyes of our own employees, which will sell it to the rest of the world.
• Program to employment
• Acknowledge issues of racism and sexism- be aware and confront it
• Consider a job fair in city where WEFTEC is located that year.
• Dedicated time for follow up with new employees for the first few years, let them know they can ask questions and are not on their own – take time for your staff.