WEFMAX in Girdwood, May 9 – 11, 2018

WEFMAX Day I

WEF Business – Presenter: Jackie Jarrell

1. Review of critical objectives and strategic plan –
   a. 5 objectives
   b. 20 goals
   c. WEFMAX Themes
2. 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
3. Stockholm Junior Water Price – 2 US students won the international prize
   a. View 2017 SJWP video on YouTube
4. Midyear Springboard program – any YP can apply to be part of this program
   a. Integrates students into WEF
5. 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
6. What can we do to get members engaged?
   a. Mentor a student/YP
   b. Hold networking events
   c. Encourage YPs to join the WEF YP committee
   d. Encourage YPs to apply for the springboard program
   e. Promote job opportunities
   f. Start/support a student chapter
7. Engaging operators – what WEF is doing
   a. OWWL – On-demand Wastewater Library;
   b. Ops challenge
   c. Training materials
8. What can we do to support operators?
   a. Support/mentor ops challenge team
   d. Encourage ops committee volunteers
   e. Encourage volunteers to review technical publications
   f. Share operator training and knowledge
   g. Encourage volunteers to review OWWLs; WEF needs a lot of help with content review
   h. Let WEF know how they can help
9. Utility Management
   a. Partnership this last year with EPA; bringing workshop to various utilities about effective UM
   b. There are programs being offered by WEF for MA UM/Finance committees
10. 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
11. Utility of the Future program (deadline end of May) – 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

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

13. Water Research Foundation
   a. WERF joined with the Reuse Foundation to become WE&RF and has now become the Water Research Foundation
   b. This is in the process of merging right now

14. NGICP – National Green Infrastructure Certification Program
   a. Now have the first certified people in the program
   b. Workforce development program
   c. This program is expected to grow a lot

15. WEFTEC – main ways to engage with all members at one time

16. What can we all do together to get people more involved?
   a. Connect MA committee members with WEF committees
   b. Connect with your WEF delegate
   c. Ask WEF how to...
   d. Exchange information with other MAs – at WEFMAX or other events
   e. Provide WEF your ideas
   f. Make the most of MA visits – we are there to listen, help and learn

17. Value of Membership
   a. Lifelong Learning
   b. Workforce Development
   c. Innovation
   d. Expert Resources
   e. Rewarding Experiences
   f. Training
   g. Advocacy
   h. Lifelong friends

18. Calendar of Key Events Throughout the Year
   a. Includes webinars, SJWP dates, Water’s Worth It, etc.

**WEF’S Public Awareness Plan – Lori Harrison**

1. Working to increase the awareness of impact and value of water
   a. Permanently embedded in the strategic plan

2. Working not just to create awareness, but specifically in a way that increases funding

3. Hired a new Sr. Director of public outreach that is working with task force members and others in WEF memberships

4. Have created a 3-year roadmap
5. Continuing to build content in the MA member 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)

6. Invitations and reminders for events will go out a month in advance of the event or activity
   a. Calendar of events available, webinars, national day’s etc.

7. Public awareness dates
   a. World water day – March 22
   b. World toilet day – November 19
   c. Infrastructure week – in May
   d. Imagine a day without water – October 12 (organized by Value of Water Campaign)

8. Water Palooza Toolkit – hands-on activities for grades 1-5 distributed to MA’s

9. The Value of Water (VOW) replaced World Water Monitoring Challenge

10. VOW Campaign
   a. Making the case for infrastructure report
   b. Annual public poll on infrastructure
   c. Wef.org/valueofwater
      i. Lots of resources in here including print-outs, infographics, bill stuffers, etc.

11. #MyWaterLegacy challenge on social media
   a. 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
      i. Quarterly topics are: mentorship; leadership and advocacy; community service; public education

12. Planning a refresh of the Water’s Worth It campaign this year
   a. Not changing the program completely, just a brief refresh and building off what was created previously
   b. Making effort to make a more useful tool beyond US audiences
   c. Relaunching during opening session at WEFTEC

13. Social Media
   a. More interactive, frequent posting on social media channels

14. Live streaming certain events throughout the year as well

15. Words on Water Podcast – each week, a prominent water leader is interviewed for the podcast. Archives on website


17. 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

18. Progress report
   a. Sums up what we did last year and what we want to do moving forward

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**HOD Update – Presenter: Aimeé Killeen**

19. There are 5 standing committees in the HOD and 3 workgroups
   a. Steering; WEFMAX; outreach; nominating; budget
      i. Operator workgroup; membership workgroup (working on dues strategy); student chapters
      ii. Educating delegates to ensure they understand they are the liaison between the MA members and WEF
      iii. Dues strategy toolkit being developed to:
1. Communicate dues structure and proposal processes,
2. Ensure information reaches MA’s
   iv. Operator ingenuity tool kit developed for social media, ad templates etc.
   v. Student chapter workgroup
3. Ensure chapters are active and supported at MA and university level
   vi. Communication is key – delegates need to be reaching out to their MA’s with information and providing feedback to WEF

Operator Workforce Strategies – Presenter Catherine Curtis

1. IN CALIFORNIA
   a. 30% of certified operators are over 56 years old; 56% are over 46 years
   b. 38% of Garde IV and Grade V operators are over 56 years old
   c. Certification exam passing rate for grades 1-3 are at 65-70%
   d. Exam passing rate for grades 4-5 seems to be declining; only 15.5% of operators passed the most recent exams
2. More people are eligible for retirement every year; these are mission critical jobs
3. Fewer students preparing to fill these jobs
4. BAYWORK: a regional consortium; Started with 14 utilities; organization is around 10-years old
   a. Roadmap strategies
      i. Goal 1 – develop qualified candidates
      ii. Goal 2 - Provide staff with info they need
      iii. Goal 3 - Modify work processes to optimize available jobs
      iv. Goal 4 – use collaboration as a tool
   b. BAYWORK Principles
      i. Research based action
      ii. Continuous improvement
      iii. Cost-effective through collaboration
      iv. Knowledge-sharing among peers
      v. Commitment to the industry as a whole
   c. Recommendations
      i. Increase awareness of industry and trades
      ii. Increase readiness of youth and other job seekers for trades
      iii. Increase classroom training capacity
      iv. Increase entry level job opportunities for mission critical positions
      v. Address financial barriers to training leading to the trades
   d. Continuous innovation
   e. Workshops on wheels – rent a bus with 50+ people and go to 5-6 utilities that are in the same region to see new technologies; good opportunity for networking and learning
   f. Knowledge Transfer Toolkit
   g. Internship guidebook Contextualized Learning How-To Guidebook: Helping Student Learn the Skills Industry Needs to explain to students why they need science and math and how they would use it in their careers
   h. Baywork Training Buffet
i. Curriculum for a day (sort of a mini conference with concurrent sessions) that provides contact hours

ii. Collaboration with community college system and other organizations
   a. Developed Internship Guidebook

5. Website resources page, not just from the Bay area – open source found at baywork.org;

6. Careers in the industry and what path to take to get into that career; downloadable for your use
   a. Testimonial video’s
   b. Events, past events
   c. Job Fairs
   d. Downloadable posters and brochures

7. Partnering with other organizations and obtaining grants

8. Q: How can we collaborate with MA’s
   a. Place Knowledge Transfer and Educator toolkit/tab on wef.org youth outreach link that was presented earlier Lori’s presentation
   b. Process needs to be designed to enhance accessibility

Operator Workforce Strategies – Presenter Sidney Innerebner

9. New game-changing education manuals to simplify (Book 1 is complete and can be preordered at wef.org/wwtf)
   a. New manuals are much more graphics-intensive (there are 2)
   c. Vendor-supplied graphics and real-world photos all printed in full-color
   d. Accessible language – targeting a 6th-grade reading level
   e. Relatable analogies/explain complex topics
   f. Remove glossary and utilize sidebars highlighting page contents
   g. Lots of practice questions/exams
   h. Scenario worksheets, real world operational problems
   i. Chapter summary guides (quick reference for targeting review)
   j. Companion interactive online training courses that mirrors the manuals (WEF is applying for CEUs in all states to be validated for course time and progress in the online system)
   k. Online quiz questions not published in printed books so will be updated on a regular basis

10. Operations-focused publications
    a. Released at WEFTEC 2017

    a. Basic Lab Procedure for the Operator/Analyst
    b. Water and Wastewater Lab Techniques
    c. WW Operator Guide to Preparing for the Cert Exam
    d. Available at the WEF Bookstore on the shop WEF page

12. OWWL (On-demand Wastewater Library) – the Wikipedia of wastewater available at wef.org

13. Operator Essentials columns in the back of the WEF magazine

14. Questions:
    a. Q: What level are these resources target to
    b. A: Lower to intermediate
    c. Q: What is planned to obtain reciprocity, so courses are approved by states
    d. A: WEF is seeking each state individually
    e. Presentation will be available after WEFMAX summaries are posted
SESSION I: MEMBERSHIP
Scribe Notes – by Angie Monteleone

WATER ENVIRONMENT ASSOCIATION OF UTAH—Presenters: Clint Rogers & Lonn Rasmussen

Can you Feel the Love?

How we utilized #MyWaterLegacy to increase WEA of Utah member involvement and create a perception of value

1. Board meetings – different host facility for each meeting, kicked off with #MyWaterLegacy moment
   a. Identified theme
2. Retreat – team building event to escape being a Zombie at board meeting
3. Video
4. Mid-Conference presentation
5. Annual conference presentation
6. Examples of #MyWaterLegacy moments
   a. Utilized University of Sacramento Manuals – different chapter used for each session
   b. Tours of Lift Stations
   c. Engineering plans so budgets matching bids, to provide advanced treatment for future growth
ii. #MyWaterLegacy creating:
   a. Value from involvement in WEAU
      i. Networking
      ii. Teamwork
      iii. Sense of accomplishment
      iv. Pride in what we do
iii. Annual Conference
   a. Awards and announcement times include #MyWaterLegacy spotlights with photos
   b. #MyWaterLegacy campaign kickoff on wef.org, utilized to create video for Utah available on website
iv. Q&A
   a. Q: Do operators provide your keynotes
   b. A: Yes, board members and operators – we have a public works operator rep on our board (600 members, 60% operators, 14 Ops Challenge teams). Working on a WEFMAX with an OpsChallenge event to kick it off.

WESTERN CANADA WATER ENVIRONMENT ASSOCIATION – Presenters: Natalie Wilson & Timo Jansen

1) Membership
   a) Challenges identified, and steps taken to resolve
   b) Environment challenges
   c) 4 associations formed under umbrella group, each have national conference in their geographic area
   d) Discussions of joining 2 existing YP groups into one
   e) Geographical challenges exist
   f) 60% of membership in Alberta, 6.5 million residents, 2 mill square miles
   g) Each province has a provincial counsel
h) Revenue sharing opportunities created to assist
i) Less than 300 paying dues into organization, needed new strategic plan

2) WCWEA Strategic Plan
   a) Member Value –
      i) Goal to increase awareness on what the organization has to offer its members
      ii) Provide Networking Opportunities
      iii) Training needs survey
      iv) Facilitate Knowledge exchange
      v) Increase member value by utilizing existing WEF materials
   b) Member engagement
      i) Keep happy and engaged so retain, goal is to increase membership by 20
      ii) Tell a friend being rolled out
   c) Member input and outreach
      (1) Identified need for training,
         i) Currently hosting a Stormwater conference
   d) Sustainability on board
   e) Volunteers
      i) Technical committees reduced to one: Stormwater – working to identify and rebuild others
   f) Desired Outcome input
      i) One day mini-WEFMAX event for committee chairs and each invite one committee member relaying what
         WEFMAX has offered and has to offer – highlight existing resources
      ii) Utilize WEF staff as resource
      iii) Missouri MA looked at fees being charged, focusing on member vs nonmember rate with intent to entice and
           engage non-members to join
      iv) Utah has done monthly technical trainings that offer 1-year memberships to attendees of half price as
           incentive to join

3) Q&A
   a) Question: How do you find travel funds with geographic challenges
   b) Answer: Challenge, consultants have had to reduce support funding, try to host in multiple cities
   c) S Carolina MA has districts, each putting on their own operator events in their areas
   d) Alaska has similar remote issues, we have successful monthly lunch presentations and are working on video
      conferencing them for remote village
   e) Make sure to provide Contact hours
   f) S Carolina - utilized book called Tribes, written by Seth Godin was very helpful to identify communication. Started
      newsletter highlighting achievements, kudos for awards encourages members and connectivity
   g) Question: Do you interact with operator groups, suggest going to their events and offer opening remarks or
      awards
   h) Answer: Hard to get into those groups due to geographic and cliché’s
   i) Ontario supplier – Challenge of understanding who does what and why, duplicated efforts between organizations
      under umbrella. Joint conferences forum may be effective...

WEFTEC MEMBERSHIP RECIPROCITY DISCUSSION – Presenter: Aimeé Killeen

1) Membership recruitment initiative – launched in 2017 at WEFTEC
   a) Went to WEFTEC and signed up for a membership to WEF they were given the membership for a year
   b) Way to ask people at WEFTEC who are not WEF members
c) MA’s could elect to participate
d) 32 Mas participated
e) 351 new members provided with welcome packet (available on wef.org MA resource page)
f) 10 MA’s gained 10+ members
g) Majority of new members from US
h) Average 11 new members per participating Mas

2) HOD member relations work group
   a) Will WEF be willing to wave the membership fees like MA’s also waive the fee –S reciprocity
   b) Keep the 351 new members – how?
   c) Tools are available to help MA’s keep the new members from joint WEF/MA
   d) Plenty of stuff on WEF website
   e) MA have the information and go to the WEF website
   f) How many MA’s have membership retention tool kits or use them
      i) New member welcome letter
   g) So much on line so don’t need to reinvent the process
   h) Are welcome letters effective?
      i) NY – Letter and call to new members effective
         i) Dedicated member hired – part-time
         ii) Go through stages because it is hard to stay on top of it
         iii) Is there a script – number of years ago had a script
   j) Want suggestions on how to improve the materials
   k) Feedback on what is missing in order to engage and retain members

3) Membership reciprocity

4) Goal is to encourage WEF membership and enhance MA membership

5) Developed from requests at WEFTEC 2015 Leadership Day

6) Membership recruitment initiative-
   a) Went to WEFTEC and signed up for a membership to WEF; they were given the membership for a year
   b) Way to ask people at WEFTEC who are not WEF members
   c) MA’s had to choose to be a part
   d) 32 MAs participated
   e) 351 new members
   f) 10 MA’s gained 10+ members
   g) Majority of new members from US
   h) Average 11 new members per participating Mas
   i) See blue sheet – MA Reciprocal Membership Plan
   j) Goal is to have outreach in both directions
   k) WEF will provide – welcome email and new member letter; exit survey
   l) WEF membership codes have gone out (minimum of 3) to use however you want; ideas on how to bring in new members; one year from date of issue to distribute – membership one year from when activated

7) Pilot MA Reciprocal Membership Plan being extended to 2018, sent to each ma that participated in campaign
   a) Flexible options and has stipulations

8) FEEDBACK/What does your MA’s need?
   a) Stronger WEF branding items included in new member packets (coupons to WEF merchandise, notepads, pens etc.)
   b) Additional focus on how to bring in more regulators
c) Concerns with only 1 code provided to the MA but it is applied to 3 complimentary registrations – need to provide individual one-time use code for each registration. This code also tracks retention...

d) WEF tracks the new memberships

e) MA’s would like to see notifications from WEF to membership chairs/delegates when a member joins (AWWA does this currently). If concerns with too many emails, create opt in? It is an opportunity to market upcoming events and networks to new members.

f) Invitations to Students and YP’s need to be shared to WEFTEC, registrations are free.

WHAT DID WE LEARN...summarized by Patty Kennedy

- Use of Baywork materials – leverage materials
- Communication of value of WEF to MAs and future members
- New members – initial letter and follow up after
- Recognize new members – eblast of new members and recognize long term members milestones
- Demographics of membership so needs can be identified – keep them engaged
- Regulator membership – difficult to engage to be member
- Membership tied to volunteer – reduced fee
- Utility rate – similar to AWWA
- Need to call and follow up – personal touch
- Need to seek out volunteers
- Relationships are key!
- Get them involved early – before they can say no
- Personal message is effective to get others involved
- Come for content, stay for relationships
- Collaboration – between MAs and other organizations
- SWAG is good – celebrate new member
- Use the brand
- Call and thank committee chairs and thank for service
- Exit interviews – what were issues that were not addressed?
- 2 new members to replace 1 member that does not renew – need to retain existing members
- National WEF committee and MA committee need more communication
- Expertise from MA could be shared at National level
- Reciprocal memberships good
- Yearend summary – letter from president or discussion at conference
- Toot your horn!
- Don’t forget “thank you” and follow up emails

SESSION II: ENGAGEMENT
Scribe Notes – by Angie Monteleone

NEW ENGLAND WATER ENVIRONMENT ASSOCIATION – Presenters: Ray Vermette

1) NEWEA at a glance
   a) Founded in 1929 (89th year)
   b) 2,300 members
   c) Staff of 3
2) Volunteer Opportunities
   a) They have several councils with committees
   b) Board members are on the councils and serve as liaison to the executive committee

3) Student Outreach
   a) Presentation Tool Kit K-12 created by Public Education Committee
   b) Teacher training annually to sit down with them and discuss water industry
   c) College and university initiative – have an executive committee meeting at one of the colleges or university every year and also have student chapters
   d) Recommend having a career day at schools

4) YP Development
   a) Summit modeled after WEF’s YP summit
   b) Half day program that’s part of annual conference
   c) YP’s plan, organize, and stage the event
   d) After the event there’s a networking reception with members, also after the Executive Committee Meeting

5) Mentor Program – initiated by YP’s to develop future members
   a) Match mentors with mentees for an 18-month program

6) Poo and Brew also developed by YP Committee
   a) Networking/Relationship building and knowledge transfer
   b) Plant facility tour followed with a networking session at a local micro-brewery
   c) Planning the 13 events currently
   d) Attendance is typically around 40 people

7) Veterans Workforce Development
   a) Connect veterans with job opportunities
   b) Water Warriors white paper
   c) Create awareness of water infrastructure jobs
   d) Meet with regulatory agencies, labor departments, and job placement agencies
   e) Established an ad-hoc committee in 2017 with state subcommittees and liaisons
   f) Four step process – recruitment, placement, training, and certification
   g) Lifelong careers

8) Innovation Task Force
   a) Innovation pavilion similar to WEFTEC
   b) Connecting with colleges and universities on research programs
   c) Innovative technologies and trends
   d) Entrepreneurship
   e) Workforce development
   f) Started in 2017 and continues to evolve

9) Operator Ingenuity session at Conference
   a) Operator forum put on by operators speaking to things they have done

Q & A

1) Comment: NEWEA staffing tool on website – used by others repeatedly
2) Q: Your mission statement was updated, what was old and what drove the change
3) Rebranding 3-4 years ago. Evolving as an association like the industry involves. Get pollution and Waste out of our name to be more palatable to the public. Incorporated a logo to identify ourselves: water, safety, earth, and infrastructure.

4) Comment: Latest edition of journal has a great Ops Challenge article

GEORGIA ASSOCIATION OF WATER PROFESSIONALS – Presenter: Pam Burnett

Life Member and Retirees Task Force

- Established in 1932, Umbrella over all but rural water
- Changed name a few years ago
- Members: 4000 ind; 200 com; 200 util
- 14 staff, 4 full time instructors, own our own building
- Water Innovation center being built by Gwinnett county, partnering with them to establish training initiative
- Leadership academy
- Executive forums, meet with util and bus execs quarterly – provide top speakers not in the industry
- Stormwater school with full curriculum
- H2Opportunity (workforce development program)
- Keynote speakers – focus on blue collar leadership
- Renaming our OP’s from “geezer” to GURU Committee –
  - connect our life and retired members to YP’s
  - History project – boxes of historical items that have been collected over the years being turned into a museum of history,
  - Updating history of water website
  - GURU porch at conference: set in a setting of rocking chairs, checkers, get off lawn signs etc. to have YP’s visit with GURU’s to learn.
  - Field trips - Bellwood Quarry, Johns Creek Environment Campus, Buford Dam etc.
  - Interact with YP’s

Q & A

1) Q: Old Farts committee in S Carolina as well. Do you have travel funds for them?
   a) A: They started policy of not using association funds, they cover their own and even fund other areas such as scholarships or contributions to funds

2) Q: Tours – do they do joint tours with YP’s
   a) A) Yes, most are done during business hours so it takes coordination

3) Q: Life memberships –
   a) Discounts are offered if retired

OHIO WATER ENVIRONMENT ASSOCIATION – Presenter: Pam Burnett

- >2k members
- 12-member EC
- 8-year rotation
- 3 staff – exec admin and 2 office assistants
- Houston...We have a PROBLEM
10 years Exec Admin – strong financials and well-established procedures, so didn’t require much oversight. At end of 2016 she decided to retire.
  - Moved assistant up to exec admin position after having been there 6 years
  - Hired 2 p/t assistance to work with her

Problems: list of outstanding bills increasing and Letter of violations for almost a year of training violations
  - Struggle to get updated P&L’s
  - Defining event 8/2017: Contact hour issue with OEPA, resulting in immediate termination of EA
    - Affected over 600 operators never received by President to whom it was addressed
    - Limited financial records in 2016 and 2017
    - $172,000 in unpaid bills, $80,000 in uncollected
    - Decision based on previous balances
    - Lack of confidence in central office
    - Had to reconstruct 2 years worth of records so operators would not lose licenses for lack of training records.

How did we solve
  - Temp admin staff hired
  - Responded/worked with OPEA
  - Rebuilt financial records and paid outstanding bills
  - Worked to not have noticeable impact on events and member services
  - Executive Committee members volunteered a lot of time
  - Remaining OWEA staff carried on with business
  - Started search for new executive administrator
    - Advertised on WEF website
    - Ohio Assoc of non Profit Organizations
    - Association of Fundraising Professionals
    - American Society of Association Executives
  - Received 25+ resume’s
  - Created our Candidate Review Criteria, along with a candidate shortlist and President, President elect and Vice president interviewed
  - 1/2018 Hired new Executive Administrator in January of this year, resolved issues with OEPA

Lessons learned
  - If something seems off it probably is
  - Even when things are good oversight is prudent
  - Training/involvement of EC in key areas

Onward and Upward
  - New EA with strong association background
  - Refined contact hours process, including updates to written SOP
  - Increased financial transparency
  - Monthly 3rd party review

Q&A

- Q: Have you considered contract administration as opposed to employee
  - A) No, AWWA in Ohio contracts out and haven’t had terrific results
- Q: Is monthly review an audit
  - A) Partial audit monthly, full audit yearly
Q: What was your discussion processes?
   o A) just among board members and general consensus determined selection rather than formal process
Q: What were your concerns over litigation
   o A) couldn’t find evidence of missing money so neglect was issue more than fraud

OPEN DIAGLOGUE SESSION

1) Here in Alaska, we have had enthusiastic volunteers – taking on monthly lunches, sponsorships obtained for conference events – happy with engagement
2) Young Professionals moving into professional roles need to be shown where they can fit in, encouraged and mentored
3) Atlantic Canada – also experience an issue with a hacker, deleted out all our records. Message stating compromised, and $12,000 in bitcoins was demanded. Had backup so when looked into restoring and it was compromised as well, affecting 16 years of historical files and documents.
   a) Able to recover emails and some financial files
   b) Now paying external company to maintain backup
   c) Hacked again during restore, lost what had been recovered – both business and personal credit cards hacked as well.
   d) Insurance claim filed, hard drives had to be turned over
   e) Now using cloud storage
   f) Hackers are a step ahead of us – protect your MA!!!
4) Non-profit staff members are not tech specialists – find tech consultants that speak in our terms and in our budget

WHAT DID WE LEARN...summarized by Sue Sullivan

- Cybersecurity – what are associations doing – what can we do differently?
- Engaging more senior, aka old, members
- Charge for conference versus – experience and help
- Getting hacked stinks, losing EA stinks – make programs for older folk’s work
- Poo and brew! Invite brewery folks to WW plants
- Consider technical component of stuff.....
- Networking for everyone – regardless of age
- Operator CEUs
- Big name tags!
- Trust but verify
- Presentation packages for students and teachers
- Staffing tool
- Checks and balances
- ED – focus on non-profits
- Roles and responsibilities of board members - review them regularly
- Fiduciary responsibilities
- Board orientations
- Toolkit – do you have enough security etc? case studies, good bad and ugly
- Transition and succession planning
- Keep pace with technology
- Safeguard against problems
- NEWEA video – engaging with members and others

SESSION III: MA HOST – Reaching Out to Rural Members
Scribe Notes – by Angie Monteleone

ALASKA WATER & WASTEWATER MANAGEMENT ASSOCIATION – Presenter: Jennifer Warren

- Geography overview
  - Limited access to communities
  - Small community (lack of) sewer system challenges
- OneAWWA scholarship – investing in small communities
  - Two Winners from 2017, one from Igiugig, next to Lake Illiamna, which is the size of Connecticut and home of the largest salmon fishing and the other from Voznesenka (old Russian community)
  - Two winners from 2018, one from Sitka the other from Newhalen
  - Would like to put similar scholarship together for WEF in Alaska, contemplated sending recipient to WEFTEC but feel they wouldn’t be able to get away due to only ones operating plants in the village or geographic challenge
- Feedback on how other MA’s have dealt with rural or small system operators getting involved
  - How have you reached rural members?
  - How have you developed a new rural member?
  - Have you had success in developing an operator workforce?

WHAT DID WE LEARN…summarized by Mike Foerster

1. How have you reached rural members?
   - Use state associations as a resource
   - Use Rural Water as a partner
   - Technical committees to provide technical trainings for differing areas in State.
2. How have you developed new rural members?
   - WEF Reciprocal memberships to help get rural operators involved.
   - Team with rural water don’t compete.
3. Have you had success in developing an Operator workforce?
   - Hire High School kids to mow lawn in summer, learn process and stay on.
   - Train inmates to be operators.
   - Operators have separate trainings with operators only. Make it cheap. Sponsorship with no profit.
   - Use community colleges to prepare operator trainings.
   - College level courses in High school for operators.
4. Operators- what was your motivator to get involved with WEF?
   Workforce Development
   - MA programs are very positive.
   - College outreach.
   - Structured, managed by MA’s program.
   - Employer of Choice – what does it take? Pay higher, benefits, etc.
   - 2 step process –
     - engage with high schools to show it’s a profession..exciting technology..profession
Keep in the industry – YP, mentoring

- Supervisory training, as a 1-day workshop. However, issues with CEU’s. Can WEF help develop list of soft skills?
- Different CEU requirements need to be recognized.

The WATER RESEARCH FOUNDATION – Dorn Sanders

- Solicited Research
- Unsolicited Research
- Subscriber Priority
- Research Partnership
- Tailored Collaborative Research
- 2018 $6.6 Million budget
- Hot Topics outlined for 2018
- Upcoming Events, Opportunities and Dates
- Interactions
  - Annual Donations
  - Annual Research Presentations at Annual Conferences
  - MA Board meetings
  - Informational Webinars
- Design Competitions have access to WERF research (2 1st place winning teams have access to 1 year of)

HOD DIALOGUE SESSION IV – Moderator – Aimeé Killeen & Mike Kyle

Scribe Notes – by Angie Monteleone

- Brief report on history
  - WEF Vision - Essential to water professional around the world
  - 2016 Task force
  - ABC – accreditation/reciprocity
  - HOD – Operator Workgroups (surveys/White papers)
- Goals – Board Taskforce
- Advisory Panel – 14 expert volunteers and 2 staff
- Final output
  - Promote national licensure
  - Develop the operator of the future
  - Support resources for a sustainable program
  - Redraft WEF position statement
  - Certification and training summit
  - Apprenticeship standards
  - Training at WEFMAXs
  - WEFCOM “Operators of the Future”
  - No cost operator-based WEF webcasts
- OWWL
- WEF Wastewater Treatment fundamentals training manual
- Operator-oriented events at WEFTEC
  - Pinning ceremony
  - Operations challenge
    - Enhancing skills
    - Workforce development
  - Operator-focused Technical and mobile session
  - Operator Ingenuity Contest awards ceremony
- MA operator initiatives
  - Student post competitions
  - Testing service with ABC
  - Pilot WEF/MA partnership
    - Operator help line
      - Regional training sessions
    - Operations challenge
      - Promotes in local media, family barbeque
      - Subsidizes teams
    - Operator ingenuity award
- What can you do?
  - Promote WEF Operator ingenuity contest
  - Host MA contest
  - Help write and review the OWLS
- Looking for input from group –
  - 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

Comments/Questions

  o What are barriers
    • National reciprocity issues
      • State regulators not members
How do we encourage them to join and participate?
- Put in leadership positions and encourage participation
- Get them involved as YP’s

- Other underrepresented groups
  - Legislators
    - Create award categories to bring them to conferences

  - Operator Ingenuity Contest on [https://www.weftec.org/speak/call-for-abstracts/operator-ingenuity/](https://www.weftec.org/speak/call-for-abstracts/operator-ingenuity/) contains information to put on MA website and in newsletters/magazines to promote operator programs

WEFMAX Day 2

SESSION V: WEF SESSION
Scribe Notes – by Angie Monteleone
COLLABORATION AND PARTNERSHIPS – Presenter: Jackie Jarrell

If you want to go fast, go alone
If you want to go far, go together – *African Proverb*

- Most important component of WEF is our MA’s
- Who are our external (other) partners – a community of empowered professional creating a healthy global water environment (US Water Alliance, NACWA, BlueTech, WaterReuse, AWWA, WERF, WFP, EPA, Imagine H2O, CWWA ACEPU, SIWI, Pisces Foundation, CAP, Engineers Without Borders, plus international partners
- Organizations have a certain number of volunteers, and often not enough, so collaboration of uses is appropriate
- By working together, we can go farther
- Why do we partner?
  - Good for business
  - Increase efficiency
  - Reduce inertia
  - Knowledge-will help grow the knowledge base of the organization
  - Capacity
  - Innovation & Creativity
  - Build Community
  - Continuous Improvement-always working towards doing something more

- Entering partners
  - Value and Goals
  - Organizational philosophies
  - Communication
  - Written agreement

- You must understand your goals and values and understand your partners goals and values
  - Are you trying to achieve the same goals?
  - Are your goals entirely different?

- 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 5013c, 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 structure so you can move forth and partner together

• If you are trying to partner with an organization and have hit a roadblock, 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

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

Discussion
Q: How do you respond to the request to take a political stand
A: Organizations take positions, even though they are partners we may not always agree with their position. We as 501c3 organizations cannot advocate for a candidate but can take a position on legislation – we need to ensure we education on the science behind our position.

Q: what is happening on discussions with joining AWWA to become one organization representing one water
A: WEF board has met with AWWA over the past couple summers, too many differences to become one organization but many in common opportunities to partner (programs, conferences, advocacy, etc.).

  Q: Is the board reaching out to MA’s for input on any decisions to not join with AWWA
  A: No, the board determined that different needs and different philosophies precluded any further research into possibility

Comment: The WEF and AWWA boards should poll their membership to determine what they think best, feel that the majority as a member organization would like to see us stronger as one water organization (both politically and as members). At the MA level, working together as one organization in many states, in time the national organizations will move closer – workforce development and YP members would like to see one...

Q: Does WEF have an agreement template for joint conferences?
A: Yes, MOU’s and templates are available, along with legal council to review MA existing documents

Q: In New England, the members are asking for “one voice”, is there a group messaging plan in place?
A: WEF is striving to improve, aligned with AWWA and other organizations for one legislative event.

Comment: Legislators have stated that they hear daily from other organizations/associations but seldom from ours... We should do a better job nationally reaching out to MA’s with information to use to educate our
legislature. Water advocacy program is good, should get more use (CQ roll call program, which should be added to agenda at WEFMAX).
Comment: disappointed to find that AWWA isn’t in the same room at the fly-in as WEF and NACWA – would like to see more “one water” ...
Staff trying to bring it together
CWWA exists to advocate for Canada, arrangements with WEF and AWWA on federal level

ANNUAL CONFERENCE – Presenter: Scott Wilson

- Conference and planning: Why is something so fun, so hard....
- Quick poll
  - How many in the room are the sole organizer for your event?
  - How many partner with another organization?
  - How many simply “support” a water related event?
- Planning – What keeps you up at night?
  - Registration
  - Speakers not showing up
  - Bad session
  - Sessions over-packed
  - Hotel attrition & guarantees
    - Food prices went up considerably and cost the association money
  - Networking sessions
  - Exposition hall
  - Bad evaluations
  - Emergency situations
  - Technology
  - Volunteers not showing up
  - Sponsors
  - Not enough hotel rooms
  - Food
  - budget
  - Weather
  - Logistics
  - Unexpected requests
  - Getting speakers to commit
  - Venue can be challenging
  - Anything involving money $$
  - Exhibit hall traffic – making sure vendors are satisfied with the flow; food and drink events
  - Submit abstract to committee to decide what will happen at the conference; have a deadline for submission; conference committee to do most of the searching for venue and location; having a budget and have registration that is compatible
- Picking locations
  - Feasibility of travel
    - Close to airport/train
  - Have estimate of crowd size
  - Availability
Move around the state so several different associations can attend
Have in a destination that organization will pay for participants to attend; close to extra event places for entertainment
Size of hotels vs. size of group attending
Requirements and NON-guarantees
Lack of competition can allow hotels to take advantage of association
Know what other conferences are going on during your timeframe

Tools at your disposal
Convention and visitor’s bureaus
On-line planning tools
  Wild apricot has a great list –
  https://www.wildapricot.com/blogs/newsblog/2017/01/19/nonprofit-event-management-software-tools
WEF (Dianne, Scott, Kelsey, Legal Council except at WEFTEC time)

What’s in it for ME?
Evaluations
Marketing material
What are you telling them they will come away with?
  Theme based
  Earn PDH contact hours
  Stay up to date with area news
  Elevator Pitches:
  Atlantic Canada: We serve Lobster
  Come for the hours and the people; stay for the bath
  View, credit hours, cutting edge technology; networking; learn what works for them; share what works for you
  Connect and Explore; expand your career and horizon
Kraft Beer Conference –
Network opportunity to over 100,000 water professionals; PDH hours; product and services from over thousands of vendors and no new taxes
What is your water legacy? Go into dialogue.
Hawaii: We are the only game in town
Come to Palm Springs in 2019
Come to the show me state in 2019, biggest conference in the state – joint with AWWA MWWA with over 100 technical presentations...
If you don’t come, we are going to steal your clients
Know what the value of your conference it

Risks Mitigation – planning for the unplanned
Contracts – have in place and signed by correct officer
  Vendors
  Speakers
  Exhibit hall participants
Insurance - a MUST, can come after the organization and the board members
  Liability
  Request certificate of insurance form vendors
  Event: there are policies that covers against cancellation in the event of a disaster
You can’t plan for it all, but you can cover yourself for most of it!

- **Transportation** -
  - Hotel shuttles
    - Several hotels to the venue
    - Off-site events
    - Schedule clearly posted

- **Content**
  - Finding speakers
    - Request for proposal
    - Paper submission
    - Request
    - Speaker bureaus
    - Video submission (2-3 minutes)
    - Think outside the box
    - Don’t leave out the YP’s and newer speakers
    - Obtain photo with bio so you know who they are onsite
  - Speaker negotiations – sell concept to them on volunteering their time for the potential for new business rather than honorarium payments
    - Price problems
      - Speaker has handler so there is no face to face negotiations
      - Charge speakers? Coming to speak then leaving or staying to network? Set speaker rate that covers basics (meals)?
      - Speaker training event a month in advance
      - Connect with session moderators in advance
      - Cover travel costs? All part of negotiating process...
    - Speaker contracts
      - Important to have
      - Should include
        - Date and time
        - Venue location
        - Presentation title
        - Compensation – clearly state what they will receive
        - Secondary and tertiary terms
        - Intellectual property
  - What if speaker is a NO SHOW? What do you do?
    - If a breakout:
      - Cancel
      - Repeat another popular session
    - If a keynote
      - Review your pool of breakout session speakers
      - Invited guests or VIPs could quickly create a moderated panel discussion
      - A public official in attendance
    - Tap into the exhibitor pool
    - Have a few presenters on a standby list in the event of a cancellation or no show
    - Obtain presentations in advance and find subject matter experts to present slides
    - Look through all other proposals
- Talk to speakers you have booked in the past
- Executive Committee often has a presentation that is ready to give
- Cancel the session
- Use a public official in attendance

- The Expo Hall...dun, dun, dun
  - Most common feedback:
    - Not enough traffic
    - How can the organizer drive more traffic?
      - Schedule lunches in the hall
      - Speaker meet and greets
      - Passport or scavenger hunt contests (important to explain game “rules” to staff coordinating) (comment: derby cars built at location in hall and raced)
      - Place the general session room on the far side of the expo hall
      - Dedicated time for tradeshow with no competing sessions/events
      - Allow vendors to introduce themselves on stage and inviting to booth during meal functions
      - Raffle, door prizes and/or silent auction items remain at donating exhibitor booth for bidding on
      - Keep drinks/food in the exhibit hall
      - Charging stations in hall vendors can sponsor or pay extra to have at their booth

- Evaluations
  - During or after and what?
    - Sessions
    - Exhibit hall
    - Food
    - Venue
    - Conference overall
  - Why do we evaluate
    - Evaluate interest
    - Evaluate whether certain styles of sessions appeal to your attendees; workshop vs. lecture vs. activity
    - Evaluate the effectiveness of the speaker
    - Capture the satisfaction or dissatisfaction exhibitors
    - Evaluate the overall effectiveness of the event
  - What do you do with the data from evaluations?
    - Share the information with your planning committee and board
    - Provide the speaker with the score and comments from their session, only their session
    - If you include the exhibit hall on your evaluation, share any relevant feedback with vendors

- Technology
  - Session room
    - What is “standard” package
    - Will you charge speakers for additional needs?
    - Who will provide assistance to presenters
    - Who will provide technical assistance
  - General session
    - Who will handle tech needs
- How many screens
- Permission to record
- Will you use an app? Who will pay... great sponsor opportunity!
- Are you providing Wi-Fi – also a great sponsorship opportunity
- Will there be any streaming content?

- Things to Remember
  - Value Statement
  - Insurance
  - Contracts
  - Survey

Comments: What if I told you: what we do cannot please everyone - it will always be too cold or not enough food

- NC used QR codes to scan name tags this year, certain it was stressful in the planning
- Stress over financial obligations over hotel and room block when everyone registers at the last minute. How to motivate early registrations and use of hotel block with AirBnB and favorite hotels in the area?
- Travel to smaller communities reduces attendance from larger utilities so stuck in one or two area's each year

- Suggestions:
  - Educate attendees of organizations obligations to venue
  - Start up with lower block count and build in ability to expand it closer to the date
  - Discover what hotels your members would prefer and block at multiple
  - Based on attendance and exhibitors, there is only one venue available to us in certain cities.
  - Bus rental? Get sponsors, also sponsor other commercial vehicles to display ads a month out
  - Government and municipal employees are only allowed to spend up to a certain amount to draw that audience, book less room rates
  - Consistency in planning staff is a must, a better contract negotiated is the result!

WHAT DID WE LEARN...summarized by Natalie Wilson

- Think about the future and do not be stagnant with collaboration
- Rotate locations, joint AWWA
- Try to re-collaborate with other orgs
- Contracts are most important

WaterSTARRE – Yves Comeau

- WaterSTARRE is a framework to develop a set of strategic resources...
- Proposed WaterSTARRE Goals
- WaterSTARRE Program
- Advanced Resource Recover Data Request
- Dianne to include in the wrap-up email

SESSION VI: WORKFORCE DEVELOPMENT

Scribe Notes – by Angie Monteleone
ROCKY MOUNTAIN WATER ENVIRONMENT ASSOCIATION – Presenter: Will Raatz

- Supervisory Leadership Certificate Program designed specifically for water and wastewater industry professionals, leadership development program (joint with Rocky Mountain Section of AWWA)
- 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
- 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
  - New and Current Supervisors
  - Anyone interested in improving their leadership capacity
- Structure
  - 8, full-day sessions
  - Twice a month for 4 months
- Components
  - Executive panel
  - Hands on activities & simulations
  - Presentations
  - In-class discussions
  - Readings
  - Assessments
- Classes (8 am – 5 pm)
  - 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
- Professional Paid Facilitators:
  - Richard Gerstberger, Tap Resource Development Group
  - Karen Main, Innovations in Training
- Financials
  - Self-supporting (slightly better than break even)
    - Pay facilitators
    - Meet and use space at utilities to reduce costs
  - Fee
    - $1,699 for members
    - $1,899 for non-members
  - 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 – http://www.rmsawwa.org/page/SupervisoryProgram

Q&A
• Q) Is it successful because filling a void, do utilities not have their own leadership program
  • A) Program used to fill gap of workers becoming supervisors
• Cost is all towards facilitators, not trying to generate revenue from, benefit to members is idea
• Q) Any prerequisites for students to apply for course?
  • A) No known selection process if someone wants to take
• Q) CEU’s?
  • A) Certification program for each state dictates

WATER ENVIRONMENT ASSOCIATION OF TEXAS - Presenters: Julie Nahrgang, Melissa Sansing & Jessica Braun

• Workforce Development: A Case of the Power of the WAMBAT
  • Facts
    ▪ State of our State/Union
      ▪ TCEQ administers licensing
      ▪ Salary Averages (annual wage breakdown)
    ▪ Benefits of a career in the Wastewater Treatment Industry
      ▪ A career Not a Job
      ▪ Room for Advancement
    ▪ Trends Forecasts, Doomsday Prepping
      ▪ Hurricane Harvey
      ▪ Understanding in Advance so not having to have disaster to learn from
        ▪ WERF warns of a mass exodus of utility employees that is anticipated due to retirement in the next 10 years – 2012 WERF Publication
  • What WEAT is doing (as is every other MA)
    ▪ Ops Challenge
    ▪ Student Design Comp
    ▪ SJWP/Science Fair
    ▪ YP Mentoring
    ▪ Advanced Operator Training Program
    ▪ YP Track
    ▪ Diversity Track
    ▪ WEAT/TAWWA Operator Springboard Program
      ▪ Poll high schools and get list of recent graduates that aren’t going to college and take to city of Houston for training program
  • Training Strategies, Case Studies
• Pitch Perfect
• Embracing and Understanding
• Big Picture, Telling the Story, and WAMBATS

• Case Studies
  • Study 1
    o Problems:
      ▪ Lack of perceived professionalism associated with the operator position
      ▪ Preparing for workforce shortages
    o Solution
      ▪ Set up a water academy at local community college
      ▪ Created operator program at Tarrant County College
    o Success
      ▪ Utilities waiting for them to graduate and hiring
  • Study 2: Not Your Grandfathers Organization
    o Well respected firm
      ▪ Not the cool kids
      ▪ Family focused
      ▪ Well regarded and recognized older women engineers in TX
    o Network effect
    o Glass Door?
      ▪ Changed compensation and benefits package and targeted younger women professionals
  • Study 3: Data suggest people don’t leave for marginally higher paying jobs they leave managers not companies
  • Study 4: “the reality is, society needs people who work with their hands and piece complex system across disciplines together. Finding those people with all those skills that still want to get dirty is a challenge
    o What does being an “Employer of Choice” look like
    o What are the challenges as seen by an EOC?
      ▪ Referrals are from friends
      ▪ Peer to peer engagement
      ▪ Preaching the Gospel/Recruitment
      ▪ Giving presentations to the public
      ▪ Participating in career days at schools
      ▪ Making pitches to community colleges
      ▪ Selling the idea of the value of working in water

Word of Mouth Believers and Transmitters (WOMBAT)

Jessica, researcher turned techie applying innovation to bring water products and ideas to market

Great jobs and innovative things in our industry that don’t get outside of the organization – how do you bring out and impact the industry with them

Q & A

• Q) cost of community college program
• A) Originally funded by grant, it is expiring so students will be paying $2100 for course beginning this fall
Q) is WEF doing something at the national level to implement by MA’s?
A) Operator Springboard program came from YP in TX and is a resource of WEF’s
Comment: Operator Advisory Panel at WEF has workforce development on top of list. Webpage on Chesapeake Bay MA’s site is a project to get panel’s work out there... WEF is very aware of the whole idea of workforce development and how to get the tools to the utility – how to find the right people and match them to the right employers

WHAT DID WE LEARN...summarized by Natalie Wilson

- Need to encourage diversity across skill sets, not just the ‘technical’ skills.
- Workforce development program can be overwhelming to determine what to provide.
- Public awareness as early as elementary school.
- Geography and getting staff to provide the training
- Educating the people who hire the ‘water staff’ to understand how important training is. These staff could be brought into the leadership academy of the MA’s.
- Need to take the “yuck” factor out of the industry.
- Stay tuned for Words on Water from WEF in May