



Water Environment Federation Member Association

MEMBERSHIP RECRUITMENT AND RETENTION GUIDEBOOK

Fourth Edition

January 2014



PREFACE

This Recruitment and Retention Guidebook was a product of the 2012 – 2013 WEF HOD Engagement and Values Sub-Working Group. The Group's task was to gather information on existing practices or develop new tools for recruiting, retaining, and engaging members of different classes (YPs, professors, alumni, politicians, regulators); determine what currently is of (true) value; and what can be done in the future to increase the value of membership to all of the different classes. In the Group's search for already available information, the third edition of this Guidebook was discovered. It then became the Group's mandate to update the Guidebook, which has led to this fourth edition.

It is hoped this Guidebook will become a living document that is updated on a regular basis and is published so that it is accessible to all WEF Member Associations (MAs). Thanks to all of the WEF MAs that contributed by sharing their successes and/or their volunteer members' efforts in updating this Guidebook. Thanks to those at WEF for assistance as well.

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CHAPTER 1 - MEMBERSHIP RECRUITMENT

Why Recruit Members?

- To increase your membership base.
- To increase the pool of future Member Association leaders.
- To increase the sustainability of your Member Association.
- To gain new ideas from new members.
- To increase your visibility.

Where Do You Begin?

1. Gathering Data (Research)

a. Survey

If you have not done so recently, now is a good time to survey your members to find out what they think of your Member Association's (MA's) activities and services. Determine what your strengths are. In order to develop a membership recruitment plan, you need to know what attracts members to your association. Is it:

- Your annual meeting, with professional development and networking opportunities?
- Availability to other educational opportunities such as workshops, webcasts, etc.?
- Your newsletter with technical information?
- Your website and other social media opportunities (Facebook, Twitter, etc.?)
- Access to the Water Environment Federation?
- Other benefits?
- What do your members expect from your MA?
- How do they view the goals of your MA?

Remember, members' needs often change over time. MAs must have a good understanding of their membership to adapt successfully to satisfy these new expectations. Therefore, it is important to survey your members periodically to stay informed of their needs.

If you are to succeed in increasing membership, you must find ways to serve your existing and potential members in the way they wish and need to be served.

Written surveys are the most commonly used research tool in associations. The Federation's "**Survey to Go**" is available to help you put together an effective membership needs survey. The survey is available from MA Programs staff at (703) 684-2445 or e-mail to dcrilley@wef.org.

b. Focus Groups

A focus group is another popular research method. Composed of no more than 10 to 12 people, the group represents your members in age, type of work, and any other important characteristics. Be careful not to limit the group to leadership or the members that are always involved or you won't get information that represents the "rank-and-file" member.

To set up a focus group:

1. Choose a convenient site.
2. Have an agenda and facilitator. Plan what you would like the group to discuss and be prepared with specific questions.
3. Invite a cross section of your membership.
4. Set a time limit. The discussion should last no more than two hours, with occasional breaks.
5. Assign a note taker. Write down important comments from the group and audio record or even videotape the discussion.
6. Survey this focus group to verify findings.
7. Develop a follow-up plan of action.

Focus groups and surveys can help you:

1. Identify possible areas of member concern (so you can adapt).
2. Develop different profiles of your members (notice changes in profiles).
3. Identify competition (to what other groups do your members belong?).
4. Explore areas of potential member services (what do your members need that you aren't providing?).
5. Develop opportunities for networking (generally a top benefit).
6. Determine how your MA can take a leadership role in providing technical information to your local water quality profession.

2. Using The Data

Once you have your survey and/or focus group results, your MA can determine how to best meet the needs of both current and prospective members. You should establish realistic goals that: (1) improve services; and (2) improve membership recruitment and retention.

Your plan should include a long-range goal, with yearly goals. You can even divide your yearly goals into quarterly or monthly goals. Remember to keep your goals realistic, but challenging. Develop a calendar plan to meet these goals.

Developing A Membership Plan

1. Prepare a written document of your membership goals.
2. Tie in your MA's strategic plan with the membership plan (i.e., new session at your annual meeting on industrial issues = recruiting industrial members).
3. Determine how you will reach existing and prospective members. Will you send a letter, call, mail a brochure, email, or use face-to-face contact? Your options are limited by common constraints such as volunteer time and budget.

When writing your plan, don't forget to consider:

1. **Budget:** How much can your MA afford to spend?
2. **Volunteer Time:** If you are a larger MA, you will have more volunteers who can help you.
3. **Competition:** If there are other similar organizations in your area, then competition may require that your efforts be stronger.
4. **Time:** How much time can you realistically give towards making your plans work?
5. **Historical Precedence:** What membership promotions has your MA done in the past? Talk to some past Membership Chairs. Find out what has worked, not worked, and what you want to do again.
6. **Audience:** Who are you focusing on? The type of member you are targeting will determine what type of promotion you do.
7. **Geography:** Look for methods that will reach the largest groups (direct mail, ads in other association publications, etc.).
8. **Cooperating Organizations:** To increase visibility, consider working with other associations or educational institutions.

Budgeting For Membership Goals

When determining your membership budget, the following are typical costs to consider:

- Supplies (paper, envelopes, etc.).
- Postage.
- Photocopy and printing.
- Advertising (consider a no-cost trade with other groups).
- Membership Chair attendance at local/regional meetings, workshops/training courses, etc. (travel).
- Incentive and recognition awards.
- New member pins/ribbons.
- New member orientation workshop.

General Recruitment Ideas

Idea #1 – Recommendations

Your best resource for getting new members is right at your fingertips -- your current members. WEF has found from our own research that more new members join the Federation on the advice of a colleague than for any other reason (including conferences and periodicals). When prospects learn first-hand about the benefits of membership, they are more likely to join WEF than those who only read about the benefits. Provide members with a flyer listing membership benefits, making it is easy for them to spread the word.

Idea #2 – Contests

Hold a recruitment contest among your members — and PROMOTE, PROMOTE, PROMOTE! (Remember, a contest is only effective if your members know about it.) Promote the contest in your newsletter and/or mail flyers to your members. Create a theme for your contest and set goals. For example, your goal may be for each member to recruit at least one new member. Contest prizes do not have to be extravagant. Top recruiters could receive prizes such as WEF books, free registration to meetings, and free annual membership dues. Things to consider include:

- How are you going to track the sponsors?
- What is the time frame of the contest? One year? Six months?
- How much do you have budgeted for contest promotion? For prizes?

- Remind your members periodically about the contest in your newsletter. Provide updates on top recruiters and remind your members of prizes and deadlines.

Idea #3 - Member Segments

Review your MA's strategic plan to determine how it can relate to your membership recruitment plan. Are there targeted membership segments mentioned in your MA's plan? If your MA does not have a strategic plan, you should identify potential segments that are currently not well represented in your MA. For example:

- Do you have a stormwater program? WEF's e-newsletter, *The Stormwater Report*, delivers up-to-date information regarding current stormwater issues. Do you have a stormwater committee? Are stormwater topics highlighted at your annual conference and/or in your newsletter? You may want to highlight your MA's work in this area and tie it in to recruitment.
- Do you have a student program? Are there colleges or universities in your area with a strong environmental program with potential student members?
- Other Professional Areas: Small utilities, groundwater professionals, biologists, geologists, agricultural engineers, manufacturers and representatives, and business suppliers.

Idea #4 - Recruit Members/Increase Attendance at Your Annual Meeting

Your annual meeting is a perfect vehicle for attracting new members. To take full advantage of this opportunity, plans should begin at least six months before your meeting. Choose one or more of the following suggestions and PROMOTE, PROMOTE, PROMOTE!

1. Ask each member in your MA, through a newsletter, email, or a letter, to give the name and address of someone they think would benefit from attending the meeting or joining your association. Send these prospects a special letter of invitation from your President (Don't forget to enclose a membership application.)
2. Offer special conference rates for non-members that include a "free" one-year membership (sample #2).

Hint: Include a space for non-members to sign up for membership on your registration form. It is important for meeting attendees to understand that they are going to become a member — it increases the perceived value of the membership. Make sure to process conference registration and memberships simultaneously. Alternatively, set the non-member rate to the equivalent of the conference fee and one year's membership, then advertise that non-members

will receive a one-year membership in the MA by registering at the non-member rate.

3. Have a separate non-member registration booth at your meeting. Staff the booth with the members of your membership committee. Display your products and services.
4. Provide "New Member" ribbons for those that join on-site.
5. Offer a conference registration discount to every member who brings in one or more non-member registrants.
6. Hold a special "invitation only" reception for non-members (and new members) at your meeting. Arrange for speakers to discuss the benefits and services of WEF and your MA. Committee Chairs should also be available to discuss various activities and opportunities. Have membership applications available.
7. Consider sending non-members a complimentary one-day or half-day pass to your conference so they can see what you have to offer.
8. Provide specialty conferences for government agencies, new professionals, students, equipment suppliers, operations, collections, etc.
9. Provide an operator scholarship program (to cover costs) to assist rural communities by facilitating training at annual conferences/training seminars.
10. Offer high school and college/university level scholarships to students that plan to further their education in a water-related field.
11. For those who want to join the profession, provide free initial training so they are afforded an inside view.
12. Provide a Learning Lounge for attendees. (A "How To" template is available at www.WEF.org).
13. Invite leaders/supervisors to attend so they are able to see what we do and encourage them to support their employees' education.
14. Offer a specific number of free registrations (one or two) to the annual meeting (conference) to someone who has never attended and is not a member of the MA. In conjunction, offer one-year free membership to MA.

IMPORTANT: Make sure all your conference promotion materials contain membership information. Include not only your dues amount, but list reasons why one should join your MA.

Idea #5 - Mentorship Programs

A Mentorship Program encourages your experienced members to "share the benefits" with young professionals or those new to the MA/industry. Mentorship programs can be very structured or simple in nature. An example of a structured Mentorship Program can be found in Appendix A.

Idea #6 - Direct Mail Promotions

Develop a simple brochure or flyer describing your MA. Mail the promotional piece to prospective members and include a membership application. Look for new lists of potential members from other groups (seminar attendee lists and subscriber lists).

Your membership brochure should include:

- Your Member Association logo.
- Address and telephone number of an MA contact person.
- WEF's logo.
- WEF's address and telephone number.
- List of benefits and services (example: "Top 10 Reasons to Join").
- Description of your association and its purpose.
- A brief description of your membership.
- List and dates of upcoming meetings and/or events.

An MA representative should be assigned to follow up with those on the direct mail list to ensure it was received and solicit membership. If the recipient does not want to become a member, ask why or what could be done differently that would make them want to become a member. This information could help your MA refine its marketing program and lead to offering new services – remember needs are changing.

Idea #7 – Additional Ideas

For additional ideas on ways to attract new members, see Appendix B.

CHAPTER 2 - MEMBERSHIP RETENTION

Why Retain Members?

Retention is the most important component of any membership organization's activity; without a solid base of members, the organization would cease to exist.

1. Retention ensures the financial stability of your MA.
2. It is easier and far less expensive to reinstate a member than it is to recruit a new member.
3. A high retention rate helps your MA ensure a steady flow of revenue, enabling you to better plan and manage your MA's resources.
4. Retention provides you with a stable pool of future leaders.

Where Do You Begin?

Retention activities should begin immediately when a member joins. The best retention technique involves continually reinforcing the benefits of the association to your members. Your retention programs should include a plan to address three sections of your membership:

1. New members (joined within two years).
2. Members who have been with your MA for more than two years.
3. Former members.

1. **New Members**

a. New Member Ideas

The first and second years of membership are considered a trial period when new members decide whether to invest in a long-term membership. This is your Association's chance to deliver on the promise of value for the member's dues dollars. It is essential to make members feel welcome and involve them from the start. Active new members are more likely to renew than uninvolved members.

Step 1: Acknowledge new members. This may be a very obvious suggestion, but many times new members are not contacted by their MA even after four to six months of joining. Once the Membership Chair receives the list of new members from WEF each month, it is important that your MA contact these individuals.

- Suggestion: Send a letter from your President welcoming the new member into the Association or call your new members to let them know the date and location of your next meeting.
- Reinforce their decision to join.
- Invite them to a function.
- Restate the benefits they expect to receive from their membership.
- Invite them to join a committee which addresses their needs.
- Answer their questions.

Step 2: Get them involved. Promote opportunities to engage in the MA. Provide information on committees and special projects where members can become involved in the Association. Areas of involvement may include writing articles for newsletters, continuing education programs, meetings, and legislation.

- Have committee Chairs personally contact new members who are interested in joining their committee.
- Host an opportunity session at the annual conference where members can sign up for a committee.
- Offer lunch and learn meetings to highlight new or ongoing programs that need membership support.

Step 3: Give them a job. Every member should have a task to accomplish. Discover their talents, acknowledge them, and ask new members to use their talents "to help improve our industry." A member working on a task or project will exercise their own skill set and allow them to learn from others on their committee. Member productivity and a sense of purpose will increase the value an individual receives from their membership.

Step 4: Call or write new members on their sixth-month anniversary.

- Survey their satisfaction level.
- Discuss their involvement in meetings or committees. If they are still uninvolved, ask why.
- Ask them what the Association must do to ensure their long-term involvement.
- Reinforce your commitment to meet their needs.

Step 5: Involve your Young Professionals. YPs are often encouraged by their employers to participate in association events, and have the time and

energy early in their career to help the association. Getting YPs involved helps reinforce the value of the association and makes for life-long members.

- Work with the YP Committee Chair to develop a YP Engagement Liaison.
- Have the YP Engagement Liaison work with other committee Chairs to identify open positions or committee needs
- The YP Engagement Liaison will identify YPs who are suited for a particular position.
- Tasks for YPs should be clearly defined and easy to execute.
- Once a YP has assisted with some individual tasks, they can be given more complex tasks with less direction.
- Encourage YPs who have proven themselves to take on committee and executive leadership roles.

Step 6: Provide social opportunities. Events during and around conferences will promote a sense of camaraderie. Social connections in an association will improve member retention rates. Ideas for social events include:

- Bowling tournament.
- Golf tournament.
- Fun run.
- BBQ competition.
- Motorcycle ride.

b. New Member Orientation

Your MA should consider organizing a new member orientation every three to six months. If that is not possible, your MA should, at minimum, hold one orientation at your MA's annual meeting. This might be your new member's first networking opportunity. The opportunity to network is one of the top reasons members join WEF. Orientation suggestions include:

- Plan the orientation agenda. Keep it short and simple.
- Arrange for speakers to discuss the benefits and services of WEF and your MA.
- Hold the orientation in conjunction with another meeting.

- Invite new members and their colleagues. Send a letter or invitation and promote the orientation in your newsletter. Always make sure to include the date, time, and location.
- Ask for involvement. This is an excellent opportunity to enroll and involve members in committees.
- Discuss the value of membership dues.
- Discuss the Association's missions/goals and objectives.
- Follow up with an evaluation form. Ask attendees to provide feedback on your orientation. The form could also serve as a committee sign-up sheet. Use the comments/suggestions to improve your next orientation.
- Have membership applications available.

c. Other Ideas for New Members

- Publish the names of all new members in your newsletter.
- Feature a new member, pictures, and/or interview in the newsletter.
- Send a new member information on what to expect at a meeting/seminar.
- Recognize new members at meetings by assigning them a special badge or pin.
- Assign a "buddy" to each new member during your annual meeting.
- Mail a "How's it going?" letter or postcard at the six-month mark.

2. Members Who Have Been With the MA For More Than Two Years

a. Retention Suggestions

- Conduct a membership survey to find out who your members are and what they would like from your MA. Determine their interest level in becoming involved. Use the data to increase involvement and gain a better understanding of what it will take to keep your members.
- Review your most recent annual meeting registration roster and look for names that you and other officers don't recognize. Call or send a letter to these members with a specific goal in mind, such as joining your program committee.

b. The Newsletter/Publication

An important part of retention is staying in contact with your members through meetings, phone calls, newsletters, or publications. Newsletters/publications are a primary means of communicating to your members. Since some of your MA's

members will never attend an association conference, business meeting, or seminar, their impression of the organization will be based almost entirely on its publications. If you don't already produce a newsletter/publication, you might want to consider creating one.

The benefits of a newsletter/publication include:

- Keeps members informed of activities and meetings.
- Can be used as a tool to attract new members.
- Serves as a member benefit.

A newsletter doesn't have to be an expensive publication to be an effective communications tool. The purpose of your newsletter is to provide useful information to your membership. Newsletters can be revenue neutral by obtaining sponsors, or publications such as a magazine or electronic publications can result in modest revenue. Whether or not your MA newsletter/publication results in direct income like educational programs, conferences, or other publications, there are other valuable advantages:

- Provides for a regular communications link between the Association and members.
- Helps promote association activities.
- Provides a place for recognition of outstanding individual/group accomplishment or activity.
- Provides an important service to those who do not or cannot regularly attend association meetings or activities;
- Offers a chance for expression and creativity to Association members with skill and/or interests in publications and writing.
- Gives the Association visibility in the community.

When starting a new publication or evaluating an existing one, the first step should always be market research (see "Where Do You Begin: Gathering Data" in Chapter 1. Find out what your members want to read about in the publication. What special content can the Association provide? Perhaps your publication could include in-depth reporting on issues that are merely highlighted in other publications, or a quick summary for busy members who need to know about industry trends and concerns. Your MA will also want to seek a balance between news in the industry and local news about Association members and activities. Promotions of member services can be incorporated, i.e., an advertisement for an upcoming seminar, membership campaigns (be sure to include a membership application), etc.

A mission statement as well as editorial guidelines for your publication will help to clarify the goal and keep it on track through changes of volunteer editors.

It is also helpful to make use of freelance copywriters, editors, and graphic designers in producing your newsletter. Your members deserve a well-written, well-designed product. If you can't find a volunteer to produce the newsletter, a freelancer can do the job at a cost that, in the long run, may actually be less than that of one of your volunteers (in terms of time). It is also important to become acquainted with a local printer who can give helpful advice on a format to save you money.

There are several ways to actually create your publication, depending upon your MA's budget, available resources, and desired result.

1. You can type material ready for the printer's camera. This involves typing of your text, pasting up a layout on plain paper, and writing headlines and spaces for pictures. The printer then photographs the type, prepares the headlines and processes photos, sends you B proof, and runs the copies (unless you have access to a desktop or word processor, in which case you can do it all yourself).
2. If you have more time and money, you can find a freelancer to create the newsletter. In this case, they usually have a good working relationship with a printer and can also get it printed for you. Check your budget.
3. If you go electronic, you can save on postage costs. By using a professional publishing firm you may be able to generate some income from advertising.

For whichever format is chosen, communication is of the utmost importance. Format, style, etc. are embellishments. It is content - rather than form - that needs to be stressed.

Some newsletter suggestions include:

1. List the names of your new members each month.
2. Feature new member profiles.
3. Provide sample copies of your newsletter to potential new members.
4. Print a membership application in your newsletter.
5. Print a referral form in your newsletter. Ask members to send the names and addresses of individuals who would benefit from membership in your MA.

6. Publicize involvement opportunities in your newsletter. Develop a "Help Wanted" column and promote activities that require volunteers.
7. Feature a service of the month in your newsletter.

c. *The Website*

Websites are an additional means of communicating to your members. Much like newsletters, your MA's members' impression can be based on your website and the information provided there. If you don't already have a website, you may want to consider creating one, or if you have an out-of-date website, you may want to update it.

The benefits of an up-to-date website are:

- Keeps members informed of activities, meetings, and other relevant industry news.
- Provides contact information for the MA.
- Can be used as a tool to attract and highlight new members.
- Can be used to highlight information provided by WEF.
- Serves as a member benefit.
- Can be used to highlight information provided by various MA committees.

A few items to consider when developing and/or updating your website:

- Do you want to develop your website in-house, utilizing the abilities of your members to create the website?
- Do you want to contract with an experienced web designer to develop your website?
- How do you plan to keep the website updated? Can you do this with your MA staff, or will your web designer need to perform this task?
- Make sure that your website is vibrant, attractive, and contains beneficial information for your members.
- Look at websites from other MAs to gain ideas.

3. Former Members (Members Who Have Been Delinquent for Six Months or More)

You can get former members to return with some effort. Former members are excellent prospects because they are already aware of your Association. They just might need to be reminded of the value and benefits of membership.

- Calling former members is the most effective retention method. Ask them to renew or even attend your next meeting. Remind them of benefits and answer any questions they have.
- Send a letter to former members (members who have been delinquent for six months or more), telling them they are missed at your MA. Inform them of the new programs implemented or enhanced since they were a member. Encourage them to renew.

Retention Overview

1. **Top Five Retention Ideas** (from *ASAE Membership Developments*, December 1994)

- Get every member actively involved in the Association's activities.
- Remind members to renew their membership.
- Recognize member achievements and accomplishments (both professional and personal, in newsletter articles and through telephone calls).
- Highlight the benefits of belonging -- in newsletters, at meetings, and in mailings.
- Through welcome packets and telephone calls, work to retain members on the first day they join.

2. **General Retention Strategies**

- Examine every association activity for a membership tie-in:
 - Technical committee activity
 - Annual meeting
 - Workshops/seminars
 - Dinners/luncheons
 - Public education
 - Government affairs
- Keep track of your dropped members. Get to know the signs and take action when a member is likely to drop out.
- Let members attend their first meeting for free.
- Give new members free ad space or another opportunity to promote their service or product.
- Keep members' names and addresses current and accurate. It is the best sign of a caring and effective organization.
- Send members a "pledge card." Ask them to fill it out with the name of a dropped member they pledge to bring back.

- Conduct exit interviews with dropped members.

For additional ideas on ways to retain members, see Appendices B and C.

3. Please and Thank You's

It is very important to thank your members for joining/renewing. For example, send a thank you letter or list new members in your Association newsletter/publication. The message you should convey to your members is that they are an important part of the association.

In addition to new and renewing members, it is important to recognize volunteer efforts. The most effective recognition programs are those that not only boost volunteer egos and participation, but also publicize this desirable behavior for the benefit of members at large.

Recognize long-standing members with a luncheon. As members move towards retirement, you can keep them involved as volunteers in exchange for free members and discounts to events. Keep the knowledge and experience within the MA to transfer to YPs.

4. What's In It For You?

Recruitment and retention programs do require an effort on the MA's part if they would like to see growth in their membership. But the work that is put into planning and promoting a program does have its benefits, such as:

- Increased revenue for the MA.
- Growth in revenue means more money for existing and new programs.
- New ideas from new members.
- Increase in networking opportunities.
- More volunteers for committee assistance.
- Greater visibility.

Creating and Maintaining Continuity in MA Activity

1. Create Chair transition checklists to make sure all bases are covered for each Chair.
2. Create Board/Delegate transition checklists to make sure all bases are covered.
3. Use event planning timeline and forms.

4. Be aware of the needs of membership; identify those needs and meet them.
5. Collaborate with sister organizations with the same goals.
6. Remember the mission.
7. Update and annually revisit your Strategic Plan.
8. Solicit organization buy-in to allow employees to participate and remain active. Make a presentation to the staffs of local municipalities, consultants, etc.
9. Give conference presentations: The Benefits of your MA and Volunteerism.
10. Give presentations to students at university.
11. Give presentations to regulators for their participation, as well as their employees.

CHAPTER 3 – OPERATOR ENGAGEMENT/PROFESSIONALISM

Operations Challenge

MAs have found that maintaining an Operations Challenge (OC) Program keeps operators engaged and actively training and encouraging more participation in MA activities. It is also a competitive event that can involve family and friends.

To ensure the success of an Operations Challenge Program:

1. There should be no technical sessions taking place during a competition.
2. Encourage everyone to compete.
3. Hold a pre-competition reception to welcome all the competitors and their families.
4. Hold a fund raising event such as a BBQ or bowling tournament to raise funds to attend competitions.
5. Have different competitions within the competition, i.e. best uniform award, best fan support, best photo, etc.
6. Promote participation by showing the benefits:
 - Cross training opportunities.
 - Qualified training hours.
 - Team building work.
 - Positive work atmosphere.
 - Building leadership skills and communication.
 - Mentoring opportunities for experienced operators and training for less experienced operators.
 - Builds a network of peers and resources.
 - Expands knowledge and capability.
 - Operator-specific topic training.
7. Use other utilities or university for training grounds or ask for donations.
8. Give operators an opportunity to attend another MA conference for free so they can learn how to grow their own program. (Send OC team to competitions nationally or nearby.)
9. Encourage them to practice on their own time so they have ownership in their investment.
10. Subsidize the OC Program.
11. At conferences, have events in exhibition area to encourage talk with vendors.



12. Work directly with system managers to gain support.
13. Promote your OC Program/competitions early and often.

CHAPTER 4 - YOUNG PROFESSIONALS

Building Your Student Chapters

1. Identify university faculty members that will work with your MA (offer lecture series, plant tours, etc.). You will need to determine those in the organization that may be interested in the water and wastewater profession.
2. Create a Past Presidents Club for mentoring and training of YPs. (This type of experience needs to be retained in the MAs to assist board members and other volunteers.)
3. Provide graduate- and undergraduate-level scholarships (i.e., \$3,000 each) for professionals. Operator development should be included as well as an amount determined for training.
4. Develop pilot programs to train young engineers and operators. Involving YPs in current or ongoing projects is a great way to build better YPs.
5. In an informal setting, have Board members meet with YPs several times a year to discuss goals.
6. Provide a free MA/WEF student membership program for students that would get them involved in MA. Board or committee members would help in facilitating training and involving students in volunteer activities. (The student membership would be free as long as they are attending school and meet the volunteer criteria each year as set by the MA.) There are a variety of areas in which they can serve, such as:
 - Presentations to elementary schools.
 - Conference/seminar planning.
 - Social event planning/organization.
 - YP event planning.
 - Committee chair/co-chair.
 - Science fair judge.
 - Environmental projects.

CHAPTER 5 - PUBLIC/COMMUNITY OUTREACH

1. Post pictures of wastewater treatment plants in the province/state.
2. Invite new elected legislative officials to a plant tour.
3. Invite District Directors/municipal officials to attend Board meetings.
4. Survey companies as to how to gain their involvement.
5. Recruit committee members that may not necessarily be MA members but have technical expertise that will enhance what is offered by your MA.
6. Work with community colleges for employment development. (Find out if there are grants available to the colleges for this type of training.)
7. Maintain a presence at home and garden shows.
8. Online Resource Center.
9. Material purchases.
10. Public recognition awards.
11. Adopt a school program promoting water savings, being conscientious, etc..
12. Public Outreach Awards for individuals who demonstrate significant accomplishments by helping others to recognize the importance of the water environment.
13. Inform first-term politicians of water environment issues. Prepare a presentation to get them up to speed (see staff first to get on the schedule.) Invite them to conferences to hear concerns in specific areas.
14. Piggyback” onto and be involved in local environmental events to provide more visibility for your MA.
15. Attend annual conferences and other environmental events so your MA has more exposure. Involve your local politicians and employers.
16. Partner with other local agencies, provide food, etc., and make it a real event. Advertise viewing of local facilities (or wetlands to get people there). Take them through the plant first so they can see where the process starts.
17. Invite a local politician to give the opening speech at an annual conference.

2012-2013 Engagement and Values WEF HOD Sub-Working Group



**NEW PROFESSIONALS COMMITTEE
MENTORING PROGRAM**

Mentor Tool Kit



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Overview

The WEAO New Professionals (NP) Committee promotes career advancement by continual growth through networking and technical development. We believe that mentoring relationships may be a critical success factor in the career advancement of new professionals within our industry.

What is mentoring?

- Mentoring is a relationship between two people – the mentee and the mentor. It is not an exclusive situation. Just like leadership is not the exclusive domain of role or title, mentorship is not the exclusive domain of age or experience.
- Mentors and mentees can be young or old, male or female, introverted or extraverted. Mentoring can be generational (old mentoring young, or young mentoring old) or experiential (tenure mentoring novice). It can be cultural, or it can be motivational.
- Mentoring programs provide many benefits. They can:
 - Introduce new or inexperienced professionals to other parts of their respective organizations.
 - Augment formal training and development programs.
 - Increase job satisfaction in those who act as mentors
 - Assist in knowledge transfer within or outside of an organization
 - Retain and develop emerging and future leaders, as part of a retention strategy

Purpose of a Mentoring Program

Mentoring is a successful strategy to support professional development.

Reasons to consider a mentoring program:

- Mentoring is a successful method for transferring knowledge and experience
- The mentee benefits from acquiring new skills and knowledge
- Through mentoring the mentee increases their confidence which may accelerate their learning and ultimately their potential
- Employers benefit from the efficient transfer of knowledge and experience
- Retention rate, job satisfaction and loyalty may increase
- Mentors derive satisfaction from sharing skills and experience, and gain a renewed enthusiasm for their role as a seasoned professional
- Through mentoring the mentor has the opportunity to interact with new professionals offering 'fresh ideas' which may result in challenging and rewarding discussions and experiences

Mentoring Program - Roles

1) NP Mentorship Sub-Committee

- Provide goals and role definitions for the Mentoring Program
- Monitor and measure success of the Program
- Make recommendations on the implementation of the Mentoring Program
- Provide training
- Administer the program
- Evaluate the program
- Maintain the confidentiality of the mentors and mentees and respect the mentoring relationships
- Provide support to the mentoring pairs for the duration of the mentoring agreement, checking in periodically with the pairs

2) WEAO Board

- Support the Mentorship Sub-Committee
- Communicate the successes of the Mentoring Program and encourage participation
- Act as the avenue of redress for any problems within the Mentor/Mentee relationships
- Suggest candidates for mentoring

- Be respectful of the relationship and confidentiality of the mentoring relationship

3) Mentor

- Be committed to the process
- Provide guidance and coaching on professional development and work-related issues, particularly on areas noted in the Partnership Agreement
- As appropriate, give specific training on management and technical skills
- Maintain the confidentiality of the mentee and respect the mentoring relationship
- Be open and honest
- Be respectful of time
- Model the same excellence you expect from a mentee
- Share your impressions of the mentoring program with the Mentoring Committee to provide ongoing feedback for program improvement

4) Mentee

- Be committed to the process
- Be accountable and accept ownership of the process
- Be open to learn from your mentor, particularly on areas noted in the Partnership Agreement
- Maintain the confidentiality of the mentor and respect the mentoring relationship
- Be open and honest
- Be respectful of time
- Actively provide feedback to the mentor on the mentoring relationship
- Share your impressions of the mentoring program with the Mentoring Committee to provide ongoing feedback for program improvement

Mentoring - FAQ

What is a mentor?

A mentor is an experienced person who goes out of his or her way to help a mentee reach important life and career goals.

An informal mentor is someone who provides coaching, listening, advice, and is a sounding board they react in a casual or unstructured manner. A formal mentor agrees to an ongoing, planned partnership to assist the mentee reach specific goals over a specified period.

The American Heritage Dictionary defines mentor as “a wise and trusted counsellor or teacher”. Webster’s dictionary defines mentor as “an experienced and prudent advisor”.

How is coaching different from mentoring? Do we need both?

Coaching is the support for learning job-related skills which is provided by someone who uses observation, data collection and descriptive, non-judgmental reporting on specific requested behaviours and technical skills. The coach must use open-ended questions to help the other employee more objectively see their own patterns of behaviour and to prompt reflection, goal-setting, planning and action to increase the desired results.

Mentoring is the all-inclusive description of everything done to support a mentee in their professional development. It includes forming the relationship, emotional safety, and the cultural norms needed for risk taking for the sake of learning, with the desired result of accelerated professional growth.

Coaching is ONE of the strategies which mentors must learn and effectively use to increase their mentee’s skill set.

What does a mentor do for a mentee?

Mentors help in several ways. They give inspiration, advice, and corrective feedback on the mentee’s actions, instruction and assistance on organizational politics as well as on technical topics. They provide introductions to people who can help and opportunities for mentees to demonstrate their skills. Perhaps the greatest thing a mentor can do is encourage – convey a sincere belief in a mentee’s ability to succeed.

What does the mentor get from the relationship?

Many mentors have commented they receive tremendous satisfaction from mentoring relationships. It is an opportunity to “give something back” and to pay past mentors for their assistance. Mentors receive recognition from their peers and managers for having an eye for talent and for developing promising people. Mentors also learn new skills and knowledge from their mentees.

Can a person have more than one mentor?

Yes, in fact it is recommended. You can and should have mentors for the different phases of life, e.g., career, spiritual, social, intellectual and even physical mentors. Some mentees manage to have multiple mentors at the same time but normally the relationships would be successive, not simultaneous.

Does the mentor have to be older than the mentee?

Typically the mentor is older, but they don't have to be. It is what the mentor has to offer that matters not the age. People can acquire mentors at any age.

What do mentors and mentees do together?

Some of the more common activities are: talking together (this could be about the mentees' past experience, goals, plans, skills etc.), attending meetings, conferences and other events together and discussing later. As well as working together on activities, role-playing situations, exchanging and discussing a document written by the mentee and interacting with others.

Who should manage the relationship?

The mentoring relationship is a partnership; however, the mentee benefits the most from this relationship and therefore should take the initiative to manage the relationship.

Prospective mentees can initiate the relationship, negotiate the specifics concerning goals to work on, length of partnership, meeting times, etc. and monitoring the progress.

What are some of the problems that can occur in mentoring relationships?

The age-old problem of time! Not enough of it to spend on the mentoring relationship. Mentees unsure of their objectives, unreasonable expectations of each other, the possibility of one member taking advantage of the other and a lack of mentoring skills for both the mentor and mentee.

How can these problems be prevented or solved?

Both mentor and mentee need to aim for realistic goals, maximizing their time by use of phone, e-mail and other timesaving strategies. There is a need to talk honestly and open about the mentoring relationship, expectations, limits, best ways to interact and how to end the relationship at the appropriate time. Both mentors and mentees should work on improving their mentoring skills.

How long should a mentoring relationship last?

Formal mentoring partnerships normally last somewhere between 6 and 12 months. Seldom should formal mentoring relationships last more than a year. It is the intention of this program to last 6 months to avoid burning out mentors. Informal relationships can last a lifetime.

Is it necessary to eventually separate from a mentor?

Yes, for the relationship to be successful, the two must eventually part, at least in the “mentoring” sense. The mentee needs to know that he or she can succeed independently.

Are there stages in the mentoring relationship?

Yes, there are at least four stages: the first begins by establishing the relationship and building trust; the second stage is where the mentor is the ‘expert’ and the mentee is the ‘novice’; the third stage the mentee has learned a lot and is developing and finally the fourth stage where the mentee’s learning begins to slow and an equalization starts to occur. At this point the formal mentoring relationship will begin to wind down.

How often should mentors and mentees get together to make the relationship work?

The suggested minimum is one or two hours per month. This can be all at once or spread over the four weeks. In-person meetings can be supplemented with telephone calls and written communication.

Does there need to be chemistry between the mentor and mentee?

Mutual admiration and liking is an asset in mentoring but good mentoring can also take place if the two parties simply respect one another. If the mentor sees the mentee as having good potential, and the mentee admires and needs the mentor’s expertise, the relationship can and will work – even if the two do not feel “chemistry.”

WEAO NP Mentoring Program

If you are interested in participating in the Mentoring Program, please fill out the attached Program Application Form and return it to Julie Vincent, Executive Administrator (EA) for the Water Environment Association of Ontario (WEAO).

The process to be followed:

- Mentors/mentees submit their Application Form to Julie Vincent (EA).
- A WEAO Board representative and NP Mentoring Sub-Committee will then look to match mentors and mentees given the details/preferences provided on the Application Form.
- The proposed mentor/mentee will meet to determine if they are in mutual agreement to start a mentoring relationship.
- The mentor/mentee will be required to sign the Partnership Agreement to define expectations of the program.
- Mentors/mentees will be required to complete a Midway and Final Review to share feedback/comments on their satisfaction with the program.

Depending on certain factors including the level of experience a mentor/mentee has, there may be a three month wait period before the WEAO Board representative and NP Mentoring Sub-Committee are able to match you with a mentor/mentee. Please note that we may not be able to match up all mentors/mentees.

If you are seeking a Technical Mentoring relationship you should specify this in your Application Form so as to successfully match you up with a Mentor/Mentee that is able to meet your requirement.

The intent is to offer this program with as much flexibility as possible, however there is a minimum requirement that you and your mentor/mentee meet at least once per month.

Once the mentoring relationship has been established it is expected that the minimum time period for the relationship be six months to one year.

The intake period for Application Forms will occur two times per year. This will ensure most relationships can be formed.

Mentor Application Form

Name:

Sector:

Role profile:

How long have you been a WEAO member?

Do you have time restrictions? Yes No

If yes please list restrictions below:

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Please tell us about your career path.

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Please tell us about your technical skills.

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Please tell us about your soft skills.

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Please tell us about your hobbies and interests in your spare time.

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This program hopes to promote career planning, job enrichment and growth. Why do you want to participate in the Mentoring Program? Are there any goals you wish to achieve?

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Have you been in a (formal or informal) mentoring partnership previously? If you have, what aspects of that relationship were most/least beneficial? What did you enjoy most about it? Dislike the most?

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What type of individual do you think would be most beneficial for you to work with as a mentee?

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Mentoring experience: Midway review

Use this form (and additional pages as needed) to analyze the experience you have had up to now with your mentor/mentee. Approximately halfway through the agreed upon time together, meet to discuss the experience, and decide on what next steps to take.

Examples of activities/interactions we have implemented up to now in this partnership:

So far in this mentoring partnership, I have gained the following knowledge and/or skills:

Other benefits I am receiving from this mentoring relationship:

Ways, if any, that this mentoring partnership or program could be more effective:

Mentoring experience: Final review

Use this form (and additional pages as needed) to analyze the experience you had with your mentor/mentee. Near the end of your agreed upon time together, meet to discuss the experience, and decide on what next steps to take.

As a result of this mentoring partnership, I gained the following knowledge and/or skills:

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Other benefits I received from this mentoring relationship: Ways, if any, that this mentoring partnership or program could have been more effective:

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Recommendations I would make to other mentor/mentee pairs:

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Are you willing to be a mentor in the future? Other comments:

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Name: Date:



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Once the mentoring relationship has been established it is expected that the minimum time period for the relationship be six months to one year.

The intake period for Application Forms will occur two times per year. This will ensure most relationships can be formed.

Mentoring Program Application Form (Mentee)

Name:

Sector:

Role profile:

How long have you been a WEAO member?

Do you have time restrictions? Yes No

If yes please list restrictions below:

Please give thoughtful consideration to the questions below in order to provide enough information to get a good feel for what type of mentoring support you would like so that the best match can be made. Please do not feel obligated to answer every question. The most important thing is your interest in being a mentee. All information will be kept confidential.

Tell us about your background (education, experience, etc)

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Tell us about the career path you are interested in.

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Tell us about the technical skills you'd like to obtain.

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Tell us about the soft skills you'd like to obtain.

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Tell us about your hobbies and interests in your spare time.

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Would you like the mentoring relationship to be on a technical level?

Yes No

Explain:
.....

This program hopes to promote career planning, job enrichment and growth. Why do you want to participate in the Mentoring Program and what are some of the goals you wish to achieve?

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Have you been in a (formal or informal) mentoring partnership previously? If you have, what aspects of that relationship were most/least beneficial? What did you enjoy most about it? Dislike the most?

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What type of individual do you think would be most beneficial for you to work with as a mentor? (ie long-time employee, senior management etc.) Keep in mind the goals you have set above.

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If applicable, please list the names and/or titles of up to three people who you would be interested to have as your mentor and why.

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.....

Mentor/Mentee Partnership Agreement

The purpose of this agreement is to solidify the mentoring agreement made between both parties. This agreement is completely voluntary and should only be used if both parties are in favour.

What specific skill areas and or topics will we concentrate on in the context of our mentoring relationship?

How often will we meet? When will we meet? What types of communication are appropriate between meetings?

Mentee: What are your success criteria for your relationship with your mentor?

Please include anything else you deem appropriate: We understand the importance of maintaining the strict confidentiality in all matters, personal and professional, discussed in the context of our mentoring relationship. Our formal mentoring relationship begins on the date of the signing of this agreement, with a minimum of one meeting per month, and will end after six months unless we both agree to extend it. By mutual agreement, either party is at liberty to extend or end this agreement.

Signature of Mentee: _____ Date: _____

Signature of Mentor: _____ Date: _____

Mentoring experience: Midway review

Use this form (and additional pages as needed) to analyze the experience you have had up to now with your mentor/mentee. Approximately halfway through the agreed upon time together, meet to discuss the experience, and decide on what next steps to take.

Examples of activities/interactions we have implemented up to now in this partnership:

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So far in this mentoring partnership, I have gained the following knowledge and/or skills:

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Other benefits I am receiving from this mentoring relationship:

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Ways, if any, that this mentoring partnership or program could be more effective:

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Recommendations I would make to other mentor/mentee pairs: Other comments:

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Name: Date:

Mentoring experience: Final review

Use this form (and additional pages as needed) to analyze the experience you had with your mentor/mentee. Near the end of your agreed upon time together, meet to discuss the experience, and decide on what next steps to take.

As a result of this mentoring partnership, I gained the following knowledge and/or skills:

Other benefits I received from this mentoring relationship: Ways, if any, that this mentoring partnership or program could have been more effective:

Recommendations I would make to other mentor/mentee pairs:



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Are you willing to be a mentor in the future? Other comments:

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Name: Date:

NEW JERSEY WATER ENVIRONMENT ASSOCIATION

50 IDEAS TO HELP RETAIN MEMBERS

By: Rocco J. Maiellano, NJWEA Membership Chair

1. Send a thank you note, or an e-mail message.
2. Include networking tips in newsletter or new member pack. Networking is a primary reason for joining and one of the most important benefits to offer. Produce a short article or checklist on how to use these networking opportunities more effectively. Add to a meeting or convention brochure. Also could fax the list to pre-registered attendees shortly before conference.
3. Use testimonials from some members who aren't active but feel membership is valuable. If members feel we understand and are trying to help them cope with challenges that are more likely to renew. Ask those who are not active but continue to renew to contact other inactive members.
4. Use Jeopardy marketing putting it in the form of a question. "Wouldn't it be great if someone were working everyday to tell the public about...?" Or "Wouldn't it be nice if every month someone brought to your door another form of continuing education and a place to find out about job openings?"
5. Conduct focus groups by phone. Members with varying years of experience focusing on the needs of a small segment. New member focus group. Send all participants an agenda and set of rules. Take attendance; let everyone know who is attending. Make a list of who speaks so you know who to ask for input.
6. Give an incentive, such as a free gift, to members who renew by a certain date.
7. Have a renewal lottery – renew more quickly to get in.
8. Communicate successes to members regularly.
9. Generate segmented and targeted renewal notices. Tell each segment how membership benefited them this year.

10. Send a special certificate of thanks to first-time renewals. The first two years produce the most drops. Maybe 50% off 3rd year if paid at same time (or 2nd year?). Focus hard on the first renewal.
11. Identify and recognize members with the most tenure. Send a message that people stay a long time. (Create something for 60 years. Put on web and hotline long-term memories).
12. Identify at least four specific contact to make with first year members that are above and beyond the normal. Phone, fax or special newsletter.
13. Add ordering options to each item on publication or discounts.
14. Develop a written retention plan. Include retention goals (retention rate, retention rates by category, % of drops that were first year members, activities to be undertaken, resources available to help, etc.).
15. Do an e-mail survey of important questions and issues as they arise.
16. Establish an involvement committee. Purpose to get members to participate in some way.
17. Involve the Executive Committee in retention efforts. The health and growth of the organization is already among the Executive Committee's responsibilities. Divide the membership among the Executive Committee and devise a retention system that awards points to Executive Committee members for each member of their "team" during the year. I.e. 1 point if they attend a meeting, 25 points if they renew, 1 point if they donate to the NJWEA. Get commitment from the top volunteer leaders to not only talk about the importance of member participation and retention but also do something about it.
18. Establish a member-mentoring plan. Assign new members to current members.

19. Color code correspondence so members can quickly identify types of information. Such as one for educational information, one of legislative, etc.)
20. Institute a “thank you” column in publication to recognize members for involvement and leadership.
21. Send a member profile form to new members to gain information.
22. Have a special edition of your publication focus on how your organization is helping members prepare for the next century.
23. Be sure your web page has hot links to individual members for business referrals and networking purposes.
24. Offer a special listing in the directory to members who renew early.
25. Keep experienced members active through targeted involvement. Need to keep older members and new ones interested and involved. Keep the activities meaningful.
26. If your organization has corporate members, develop a system to involve top management of those companies.
27. Produce materials that clearly show what the company/employer gains by joining and participating in your organization.
28. For members recruited during a membership drive, add at least one extra contact during their first year of membership.
29. During functions, suggest that officers look for new members and spend time with them. Make sure new members’ nametags indicate their status.
30. Scan industry, professional, and community publications, as well as the Internet, for ads by members. Try to get them to use the association logo or some sign of affiliation.

31. Give members points when they participate in any activity. Like frequent flyer points.
32. Send an audiocassette or floppy to members as an informal annual report.
33. Establish a Membership Service Center for “one stop shopping”. A central place where they can receive all information and products/services they need.
34. Offer money-back guarantees on all programs and services (including membership).
35. Establish standards for responding to members.
36. When conducting focus group at meetings, invite attendees who are not leaders to participate.
37. Send mini-surveys that can be done quickly (via fax).
38. Develop a telephone orientation for new members.
39. Consider offering a multi-year membership at a reduced rate.
40. Consider offering a multi-employee discount to companies that pay for employees’ dues.
41. Set up a system that allows members to renew electronically.
42. Consider allowing members to create their own membership package. For example, for a basic, reduced fee members can pick two or three services they want included in their membership with the understanding that any additional services are available for additional fees.
43. When a new member joins, e-mail congratulations from an organization leader that same day.

44. Look into posting results of meetings and conferences on the Internet.
45. Increase meeting attendance by featuring an interview with the meeting's keynote speaker in the publication that comes out a month before the meeting.
46. List new members on the Web site.
47. Put individual e-mail addresses of key leaders on the Web site.
48. Combine and coordinate all forms of member communication to support membership recruitment and retention efforts.
49. Have a special list serve and/or special section of the Web site for first year members.
50. Deliver the new member kit electronically.

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Attracting and Retaining Members ... “The Young...and the not so Young”

Students and Young Professionals

- ✓ Develop student chapters
- ✓ Establish an advocate at local colleges, universities or technical schools
- ✓ Participate in science fairs
- ✓ Establish a scholarship program
- ✓ Create a Young Professionals Committee
- ✓ Invite and include young professionals who work for your organization to participate in MA/Section activities
- ✓ Ask young professionals to serve on committees and task forces
- ✓ Recognize your students and young professionals at MA events
- ✓ Ask young professionals what they look for in an association
- ✓ Establish a college/university student liaison
- ✓ Provide resume development tips for students, at an MA event
- ✓ Provide free participation for students at events
- ✓ Hold events at universities, colleges and technical schools
- ✓ Participate in Career Days
- ✓ Schedule an Information Day – during school hours, with speakers on careers in the water environment
- ✓ Implement a student poster contest
- ✓ Provide some financial support for student chapters.
- ✓ Hold a student design competition presentation at your annual meeting - Tie it to course credit
- ✓ Establish an outreach program, i.e., current members supporting young professional involvement
- ✓ Plan a FUN Young Professional event , i.e., baseball game, race, bicycle event, etc.
- ✓ Energize young professionals to recruit students
- ✓ Establish an outreach program to community colleges, technical schools, high schools, etc.
- ✓ If you are an employer, pay MA and WEF membership fees for young professionals
- ✓ Encourage and facilitate employer supported and paid involvement
- ✓ Establish credibility with town councils/officials
- ✓ Implement a poster session/technical presentation - Winners get free membership
- ✓ Provide incentives for academics
- ✓ Identify young champions
- ✓ Establish connections to academia – students and professors
- ✓ Give a young professional a valuable job or task within the association
- ✓ Give recognition to young professionals for their achievements
- ✓ Provide career opportunities at annual meetings, i.e. Career Fairs, On-site interviews, etc.
- ✓ Support a student paper competition
- ✓ Start an annual student night
- ✓ Offer student members special discounts
- ✓ Invite association members to student chapter meetings
- ✓ Promote young professional group meetings at annual conferences
- ✓ Remember that students are professionals and treat them accordingly

Attracting Members

- ✓ Match new members with involved/active members
- ✓ Connect with new members at conferences
- ✓ Require leadership to interact with members at special events
- ✓ Have officers greet new members at special events
- ✓ Correspondence – distribute information on specific involvement opportunities to new members
- ✓ List all new members in MA newsletter
- ✓ Call non-members that are in the industry, personal invitation to join
- ✓ Inform public officials and others about the industry and WEF
- ✓ Solicit active involvement of utility officials
- ✓ Include membership fee in conference registration

Keeping Members

- ✓ Call/e-mail every member to verify/update contact information
- ✓ Call before membership expires...however, be aware that calls may not always be well received
- ✓ Post magazine(s) on Web site
- ✓ Use e-mail to communicate with members
- ✓ Partner with AWWA Sections on activities
- ✓ Provide an entry level membership and actively encourage full WEF membership
- ✓ Convey value of membership to members' employers
- ✓ Convey the concept of committing some personal time, not just working hours, to the association and WEF
- ✓ Outreach to negative people.
- ✓ Contact people who have left your membership, by phone
- ✓ Call members and thank them for their involvement
- ✓ Improve MA's visibility – connection to community
- ✓ Acknowledge member's contributions, to their employer
- ✓ Award winners – “represent” WEF/MA awards at high levels