

# NC AWWA-WEA

 American Water Works Association  
North Carolina Section

 **wef** Member Association

## WEFMAX: RECRUITING & MAINTAINING MEMBERS

*Presented By:*

*Tom Bach, WEF Delegate-Elect*

*Catrice Jones, NC AWWA-WEA Executive Director*

**MAY 6, 2021**

# STRATEGIC PLAN

**OUR MISSION** (The purpose of what we do)

Dedicated to providing water education, training and leadership to protect public health and the environment.

**OUR VISION** (What we strive to achieve)

To be the leading educational resource to safe water in North Carolina

**OBJECTIVE 1:**  
To implement a "One Water Initiative", unifying the vision and purpose that sustains our organization and aligns our committees and volunteers.

- Engage each committee in developing a strategy to support their organization's vision.
- Create "One Water Initiative" ad hoc committee and identify its members.
- Develop and present branding options for "One Water Initiative" to the board.
- Announce the brand and concept at 2019 Annual Conference.

**OBJECTIVE 2:**  
To establish regional zones in support of the organization's initiatives (Western, Piedmont Triad, Triangle Coastal, Charlotte).

- Identify leaders and members in regional zones.
- Provide a framework to support the regional zone structure.
- Phase the Piedmont Triad and Western zones into identified committees.
- Phase the Coastal zone into identified committees.

**OBJECTIVE 3:**  
To provide meaningful engagement opportunities for Young Professionals (YPs).

- Present a detailed execution plan to the Board.
- Develop a marketing plan for the "One Water Initiative" concept.
- Amend the Association Bylaws to add a full-time voting YP position to the Board.
- Develop and provide more service opportunities targeting YP leaders and participants.

**OBJECTIVE 4:**  
To create a formal and visible path toward sustaining high-quality and experienced leadership to serve on the Board, providing a robust network of Council and Committee Chairs.

- Update the policies, recruitment material and Board job descriptions outlining previous preferred experience guidelines.
- Develop a formalized training plan for various leadership roles within the organization.

**GOVERNANCE**

We will adapt to provide leadership for the member organizations best aligned to our values and priorities.

**OUR MISSION** (The purpose of what we do)

Dedicated to providing water education, training and leadership to protect public health and the environment.

**OUR VISION** (What we strive to achieve)

To be the leading educational resource to safe water in North Carolina

**OBJECTIVE 1:**  
Adopt a sustainable plan for future of Maintenance Technologist Certification Program.

- Create Maintenance Technologist Certification Program Sustainability Taskforce (MTCST) to evaluate options for future of program.
- MTCST to submit recommendations for Board consideration.

**OBJECTIVE 2:**  
Adopt a sustainable plan for the future of The Academy program.

- Create an Academy Sustainability Taskforce (AST) to evaluate options for future of program.
- AST to develop and submit recommendations to Board.
- Board selects option and begins implementation.

**OBJECTIVE 3:**  
Protect and enhance the intellectual property of NC AWWA-WEA.

- Identify the minimum requirements to develop, deliver and maintain educational programs.
- Evaluate cost and benefits of various delivery methods.
- Develop templates and instructor guides for training material.

**OBJECTIVE 4:**  
To improve overall attendee evaluation ratings of certification schools by 1 point.

- Update the policies, recruitment material, and Board job descriptions outlining previous preferred experience guidelines.
- Develop a formalized training plan for various leadership roles within the organization.
- Review of curriculum and course material of all certification schools.
- Begin implementation of updated curriculum and course material.
- Develop a Train the Trainer Program for school instructors.
- Develop and implement an Instructor Recruitment Plan.

**TRAINING & EDUCATION**

We will provide high quality education and outreach opportunities to water professionals and the public.

**OUR MISSION** (The purpose of what we do)

Dedicated to providing water education, training and leadership to protect public health and the environment.

**OUR VISION** (What we strive to achieve)

To be the leading educational resource to safe water in North Carolina

**OBJECTIVE 1:**  
Understand current member and volunteer demographics of our organization and of similar organizations.

- Gather demographic data of current members based on age, gender, race, location, and industry sector.
- Identify the baseline percentage of members that are identified as active volunteers.

**OBJECTIVE 2:**  
Restructure Membership Engagement Committee to increase size, diversity, and geographic locations of committee members to better align with the regional zones.

- Identify and recruit 3-5 leaders and/or members for regional zones of Membership Engagement Committee using various strategies.
- Phase in Piedmont Triad and Western zones in Membership Engagement.
- Phase in Coastal zone in identified Membership Engagement Committee.

**OBJECTIVE 3:**  
Revise and implement new member onboarding process by March 1, 2020, with focus on personal and continual interaction during the first year.

- Identify membership and volunteerism trends for similar organizations.
- Identify and take action to address information gaps or technology challenges to meet needs of the Membership Engagement Committee.
- Research new member on-boarding strategies used by AWWA, WEF, Sections, MA, and similar organizations.

**OBJECTIVE 4:**  
Double current number of members that are active volunteers.

- Develop Volunteer Progression Pathways based upon member interest/career path.
- Develop Leadership Progression Pathways from Committee to Council Chairs to Board or other positions.
- Research and implement membership recruiting and retention strategies used by AWWA, WEF, Sections, MA, & similar.
- Schedule engagement activities to coincide with the overall organization calendar to capture a better and more diverse attendance.
- Schedule and implement two minimum social and/or networking activities per regional zone per year.

**MEMBER ENGAGEMENT**

We will be a growing and diverse organization that engages members, provides valuable benefits, and transitions members to volunteer organizational leaders.

**OUR MISSION** (The purpose of what we do)

Dedicated to providing water education, training and leadership to protect public health and the environment.

**OUR VISION** (What we strive to achieve)

To be the leading educational resource to safe water in North Carolina

**OBJECTIVE 1:**  
Deliver two events in each regional zone.

- Identify and recruit leaders and/or members for regional zones of Student and YP Committee using various strategies.
- Identify unique or key success factors for each regional zone based on population demographics, membership data and customer data.
- Develop content and agendas for the regional events based upon input from regional stakeholders.
- Provide expanded event location options within each regional zone.
- Phase in Piedmont Triad and Western zones in Student & YP Committee.
- Phase in Coastal zone in identified Student & YP Committee.

**OBJECTIVE 2:**  
Provide quarterly networking opportunities for field operations, collection and distribution professionals in each geographic region of North Carolina.

- Evaluate opportunities for collaboration or partnership with NCWA.
- Identify and prioritize list of other organizations to partnerships or collaborations.
- Evaluate current and implement new/alternative engagement & outreach opportunities at 2 certification schools.
- Identify operations level superintendents or supervisors at various utilities across NC.
- Identify and Engage operations level utility superintendents or supervisors to determine interests and priorities.

**PROFESSIONAL ENRICHMENT**

We will provide networking opportunities, information exchange and peer collaboration enhancing the careers of water sector professionals.

**OUR MISSION** (The purpose of what we do)

Dedicated to providing water education, training and leadership to protect public health and the environment.

**OUR VISION** (What we strive to achieve)

To be the leading educational resource to safe water in North Carolina



**OBJECTIVE 1:**

Understand current member and volunteer demographics of our organization and of similar organizations.

- A Gather demographic data of current members based on age, gender, race, location, and industry sector.
- B Identify the baseline percentage of members that are identified as active volunteers.

- C Identify membership and volunteerism trends for similar organizations.
- D Identify and take action to address information gaps or technology challenges to meet needs of the Membership Engagement Committee.



**OBJECTIVE 2:**

Restructure Membership Engagement Committee to increase size, diversity, and geographic locations of committee members to better align with the regional zones.

- A Identify and recruit 3-5 leaders and/or members for regional zones of Membership Engagement Committee using various strategies.
- B Phase in Piedmont Triad and Western zones in Membership Engagement.
- C Phase in Coastal zone in identified Membership Engagement Committee.



**OBJECTIVE 3:**

Revise and implement new member onboarding process by March 1, 2020, with focus on personal and continual interaction during the first year.

- A Research new member on-boarding strategies used by AWWA, WEF, Sections, MAs, and similar organizations.

- B Implement a new on-boarding process, that includes regional and personal connections.
- C Assign an onboarding mentor from the Membership Engagement Committee to meet routinely with new member during first year.



**OBJECTIVE 4:**

Double current number of members that are active volunteers.

- A Develop Volunteer Progression Pathways based upon member interest/career path.
- B Develop Leadership Progression Pathways from Committee to Council Chairs to Board or other positions.
- C Research and implement membership recruiting and retention strategies used by AWWA, WEF, Sections, MAs, & similar.
- D Schedule engagement activities to coincide with the overall organization calendar to capture a better and more diverse attendance.
- E Schedule and implement two minimum social and/or networking activities per regional zone per year.

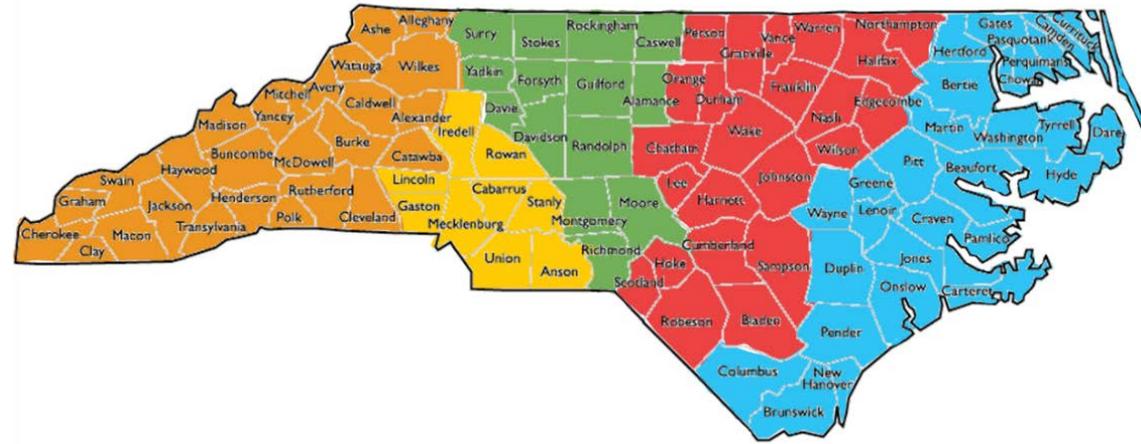


**OBJECTIVE 5:**

Improve communication tools that encourage collaboration and engagement for internal and external stakeholders.

- A Provide platform and framework for committees to schedule meetings and activities.
- B Provide viewable calendar of all organizational activities.

# REGIONAL ZONES



## Western

Alexander  
 Alleghany  
 Ashe  
 Avery  
 Buncombe  
 Burke  
 Caldwell  
 Catawba  
 Cherokee  
 Clay  
 Cleveland  
 Graham  
 Haywood  
 Henderson  
 Jackson  
 Macon  
 Madison  
 McDowell  
 Mitchell  
 Polk  
 Rutherford  
 Swain  
 Transylvania  
 Watauga  
 Wilkes  
 Yancey

## Charlotte

Anson  
 Cabarrus  
 Gaston  
 Iredell  
 Lincoln  
 Mecklenburg  
 Rowan  
 Stanly  
 Union

## Piedmont

Alamance  
 Caswell  
 Davidson  
 Davie  
 Forsyth  
 Guilford  
 Montgomery  
 Moore  
 Randolph  
 Richmond  
 Rockingham  
 Stokes  
 Surry  
 Vance  
 Warren  
 Yadkin

## Triangle

Bladen  
 Chatham  
 Cumberland  
 Durham  
 Edgecombe  
 Franklin  
 Granville  
 Halifax  
 Harnett  
 Hoke  
 Johnston  
 Lee  
 Nash  
 Northampton  
 Orange  
 Person  
 Robeson  
 Sampson  
 Scotland  
 Wake  
 Wilson

## Coastal

Beaufort  
 Bertie  
 Brunswick  
 Camden  
 Carteret  
 Chowan  
 Columbus  
 Craven  
 Currituck  
 Dare  
 Duplin  
 Gates  
 Greene  
 Hertford  
 Hyde  
 Jones  
 Lenoir  
 Martin  
 New Hanover  
 Onslow  
 Pamlico  
 Pasquotank  
 Pender  
 Perquimans  
 Pitt  
 Tyrrell  
 Washington  
 Wayne

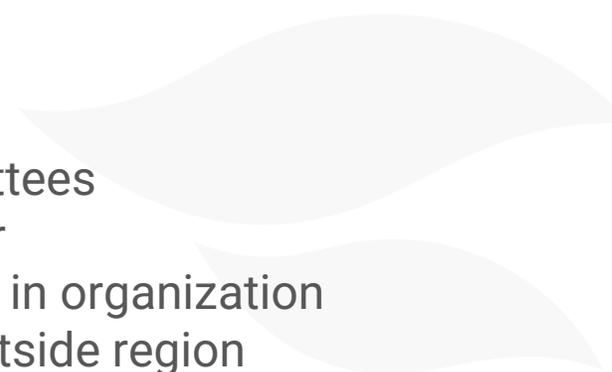


# REGIONAL ZONE GOALS & ADVANTAGES

## GOALS

- Cross section of members represented in each regional zone
- Increase “personal” contacts with new and non-active members
- Provide local event/activity ideas or venue suggestions
- Reference website for organizational opportunities
- Revise “Onboarding” and develop “Progression Path Forward” processes
- Provide opportunities for small group/team activities
- Transition “members” into “volunteers”

## ADVANTAGES

- New stream of engaged volunteers
  - Increased support for other Councils and Committees
  - Mentoring for new members throughout first year
  - Providing guidance progression pathway forward in organization
  - Providing networking opportunities within and outside region
  - Diverse knowledge of resources as result of Cross section of regional group members
  - Provide a new members method to ask organizational questions and gain valuable feedback from past experiences/involvement of regional group members
- 

# ONBOARDING – ELECTRONIC PROCESS

## SERIES OF EMAILS

- **Email #1**
  - Welcome from Chair of Membership Engagement Committee
    - *Setting up website member profile, encouraging volunteerism, carbon copy to applicable regional leader*
- **Email #2**
  - “Welcome” from staff
    - *Leading resource for promoting safe water, and preserving and enhancing the water environment*
    - *Encourages involvement from the new member and setting up a member profile; committee chair contact information*
- **Email #3**
  - “Take a look around” from staff
    - *Links to board of trustees, councils, committees and staff*
- **Email #4**
  - Volunteer recruitment from staff
    - *Links to career center, councils, committees, volunteer form*
- **Email #5**
  - “Training & Networking Galore” from staff
    - *Links to certification schools, committee meetings, conferences, seminars/institutes, and academy*
- **Email #6**
  - “How are your leadership skills” from staff
    - *Encouraging volunteerism, utilizing leadership experience, submit name for nomination to BOT, apply to leadership development program and academy classes*

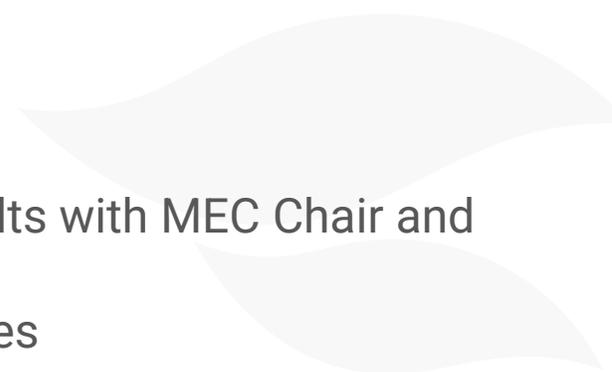


# ONBOARDING – PERSONAL CONTACTS

## PHONE CONTACT

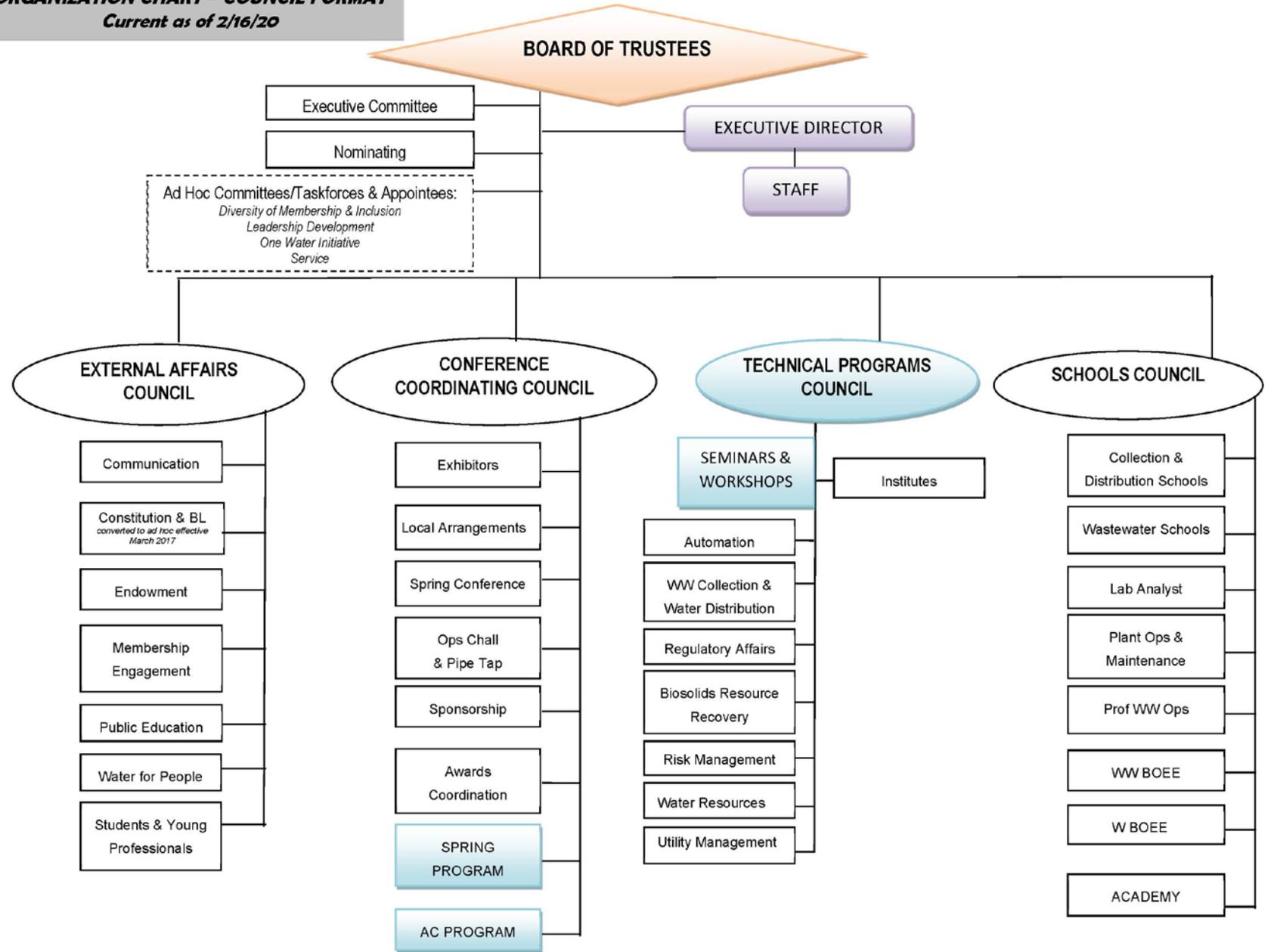
- Develop and provide scripts for new member calls
- Regional leader or designee will contact the new member by phone
- Goals for calls:
  - Establish a “personal” contact with the new member and find out their interests in the organization;
  - Set-up regular follow up calls and/or meetings with new member
  - Facilitate contacts with existing committee/event chairs and vice chairs according to the new member’s interest

## RESULTS AND EVALUATION

- Regional leaders and designee share results
  - Regional group leaders provide summary of results with MEC Chair and Vice Chair
  - Utilize results to make improvements and changes
- 

# COUNCIL STRUCTURE

## ORGANIZATION CHART – COUNCIL FORMAT Current as of 2/16/20



# COUNCIL CHAIR PROS & CONS



## PROS

- Assists staff in supporting committees
- Provides peer to peer collaboration
- Allows more seasoned volunteers opportunity to share their experience & knowledge with newer leaders



## CONS

- Can be difficult to find Council Chairs with enough experience
- Each council does not have an even distribution of committees
- Some Council Chairs have hard time breaking through the wall with their Committee Chairs



## 2021

- Providing assigned ambassadors and liaisons information needed to communicate with new members
- Complete development of progression pathways to new members based upon their interest
- Connecting the “seasoned professional” with the regional groups and navigating the process

## 2022 & Beyond

- Obtain new member feedback on onboarding process and make adjustments
- Adjust regional group structure and communications based upon feedback
- Update Roles & Responsibilities documentation for future leaders
- Return to Board’s original intent for “personal” connections with new members

# QUESTIONS

**Tom Bach**

*WEF Delegate-Elect*

[bacht@concordnc.gov](mailto:bacht@concordnc.gov)

**Catrice R. Jones, CAE**

*Executive Director*

[cjones@ncsafewater.org](mailto:cjones@ncsafewater.org)

