



ALBERTA WATER & WASTEWATER OPERATORS ASSOCIATION STRATEGIC PLAN

AWWOA Vision

Our vision statement is an energizing, positive and inspiring statement of where and what we want to be in the future

The Alberta Water & Wastewater Operators' Association will continually be an effective, valued and trusted professional organization.

AWWOA Mission

Our mission statement identifies our distinct purpose to which we dedicate our work life. This is the reason for our existence and it clearly defines why we exist and who our customers are.

The Alberta Water & Wastewater Operators Association serves its members by providing education, networking, training and ongoing promotion of the water and wastewater industry.

Values

Our values outline how we will behave while realizing our business/mission. This is the way we interact with each other and the general public.

Integrity – we believe in keeping commitments, honesty and sharing accurate information. We listen to our members.

Teamwork – we believe in working together & building long term relationships.

Professional Growth – we believe in the ongoing development and education of our members, volunteers and employees. We recognize the operators' profession.

Respect – we value individuals' ideas and contributions.

What We Do – Future Orientation

- Annual Operators Seminar
- Annual Water Week Workshops
- Website
- Free job postings
- Alberta Utility Operator newsletter
- Small Community subsidy
- Plan and execute our strategic plan
- Charity work
- Have an office and staff
- Partner and work with other organizations
- Facilitate the development, ever greening and delivery of training
- Promote careers in water and wastewater
- Manage our annual work plan and budget in conjunction with resource capability
- Follow our bylaws and review them annually
- Listen to our membership and stakeholders
- Represent interests of the operator
- Support continuing education through bursaries and scholarships
- Member recognition – i.e. years of membership, awards etc...

What We Do Not Do

- Operate W&WW Systems
- Endorse products, companies, processes, individuals or political parties
- Regulation or certification process (i.e. exams, requirements, etc.)
- Share membership lists
- Negotiate for wage or employment conditions
- Represent in legal or union proceedings
- Assign or track CEUs

Key Success Measures

Our key success measures are an indicator of our success in achieving our organizational mission and values on a year-to-year basis. They assist in ensuring continual improvement towards achieving our ideal future.

1. Employee Satisfaction
 - Satisfaction rating of employee after annual review
 - Turnover rate of staff
2. Instructor Satisfaction
 - Satisfaction rating of instructor in course evaluation
3. Member Satisfaction
 - Satisfaction on member survey which is held every 3-5 years
 - Satisfaction on training survey
 - Satisfaction on Banff survey
 - Number of Members
4. Executive Board Satisfaction
 - Exit interviews by past chair
 - Satisfaction on annual survey of board members
5. Financial Success
 - Break even with approximately 2 years of operations expenses in bank
6. Training
 - Participation level
 - Course evaluations
 - Number of courses offered/cancelled
7. Annual Operators / Banff Seminar
 - Satisfaction rating on survey
 - Participation level
 - Delegate and supplier feedback
8. Capacity supports for education and training in smaller communities
 - Small Centre's subsidy

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Key Success Measures Matrix

| Key Success Measures | Frequency | How to Measure | Baseline | Intermediate Targets | | Target | Accountability | Status Ahead ↑ On Track ✓ Behind ↓ |
|--|--------------|--|--|----------------------|-------|----------------------|----------------------|---|
| | | | 2016 | 2017 | 2018 | 2019 | | |
| Employee satisfaction | | | | | | | | |
| Satisfaction rating. To be included in yearly appraisals | yearly | Scale 1-4 (% of 3-4 ratings) | ≥95 | >95 | >95 | >95 | Office | ✓ |
| Turnover Rate | Yearly | Number per year | 1 | 0 | 0 | 0 | Office | ✓ |
| Instructor satisfaction | | | | | | | | |
| Satisfaction rating | Every course | Scale 1-4 (% of 3-4 ratings) | ≥90 | ≥90 | ≥90 | ≥90 | Office | ✓ |
| Member satisfaction | | | | | | | | |
| Satisfaction rating on member survey | 3-5 years | Scale 1-4 (% of 3-4 ratings) | 89.9% | 90 | n/a | >90% for next survey | Office | ✓ |
| Number of Members | yearly Nov. | Number compared over 3-5 years | 16- 2175 15- 2335 14-2013 13-1958 12-1827 '11 -1890 '10 -2002 '09 -1932 | 2,150 | 2,250 | 2,350 | | ↑ |
| Volunteer satisfaction | | | | | | | | |
| Exit interviews past chair | Upon exit | Scale 1-5 % of 4&5 Ratings | 95 | 100% | ≥95% | ≥95% | Chair | ✓ |
| Satisfaction on annual Executive Board survey | yearly | Scale 1-5 % of 4&5 | 95 | 100% | ≥95% | ≥95% | Office | ✓ |
| Financial success | | | | | | | | |
| Bank balance (Net Assets) | yearly | >2 years of operations expenses | Y/N 1,700,000 | 1,900,000 | | | Office Finance Chair | ↓ |
| Training | | | | | | | | |
| Participation level in courses | Every course | Percentage of Participants measured over 3-5 years | ≥ 80% | > 80% | > 80% | > 80% | Office | ✓ |
| Course | Every | Scale 1-4 | H | | | | | |

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|---|--------|---|---|-----------------------------|------|------|--|---|
| evaluations | course | (% of 3-4 ratings) | 95% | ≥90% | ≥90% | ≥90% | | ✓ |
| Banff | | | | | | | | |
| Satisfaction rating on Banff survey | yearly | Scale 1-4 % of Overall Good to Excellent | '16 93% '15- 86% '14 - 98% '13 - 93% '12 - 86% '11 - 84% '10 - 81% '09 - 93% | >90 | >90 | >90 | | ✓ |
| Participation level: Full Seminar | yearly | >500 | '17 - 529 '16 - 514 '15 - 509 '14 - 496 '13 - 510 '12 - 512 '11 - 521 '10 - 512 '09 - 552 | >500 | >500 | >500 | | ✓ |
| Delegate & supplier feedback | yearly | Scale 1-4 (% of 3-4 ratings) | Trade Show: 93% Workshops: 88% Technical Program: 85% AGM: 85% Facility: 96% Location: 89% | >80 | >80 | >80 | | ✓ |
| Small Community Subsidy | | | | | | | | |
| Small community capacity supports i.e Subsidy | yearly | Total Value vs Budget | 25K Budget \$22,478 used | 25K budget \$23,578 used | 25K | 30K | | ✓ |
| | | | | | | | | |

Core Strategies

Our strategies are the primary methods and techniques that we will use to bridge the gap from where we are today and will enable us to reach our desired vision. These are the goals for all areas of our organization.

- 1. Training (Courses, Workshops)**
- 2. Communication & Events**
- 3. Membership**
- 4. Operations**
- 5. Annual Operator Seminar (Banff)**

Strategies and Actions

Strategy #1: Training

To develop, maintain, improve and deliver a quality training program for our stakeholders.

| From | To |
|---|--|
| <ul style="list-style-type: none"> Partnering with others | <ul style="list-style-type: none"> Continue to procure, improve and maintain current partnerships |
| <ul style="list-style-type: none"> Current courses | <ul style="list-style-type: none"> Maintain and improve existing established courses/training: web-based, ever greening Strive to meet emerging training needs of members: relevance of course, new courses, availability of courses |
| <ul style="list-style-type: none"> Internal administration of training | <ul style="list-style-type: none"> Effective/efficient/accessible delivery of training |

Training Strategy Strategic Action Items

| | Action | Who is Responsible | Start Date | End Date | Status |
|-----|---|-----------------------------|-------------------|-------------------|--------------------------------|
| 1.0 | Establish Training Committee | Executive Board | March | Annual | |
| 1.1 | Meet annually to evaluate past training year and set goals for next training year | Training Committee | Ongoing | | |
| 1.2 | Quarterly – meetings or as required to discuss ongoing training needs | Office | Ongoing | | |
| 1.3 | Review existing courses for evergreening as needed | Training Committee | Ongoing | June of each year | |
| 1.4 | Coordinate instruction: selection process, delivery, assessment, retention/attraction, compensation, partnerships | Office / Training Committee | | Ongoing | Ongoing Instructor recruitment |

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|-----|--|----------------------------|---------|-----------|--|
| 1.5 | Review training re-development plan and implement ever greening of courses | Office/ Training Committee | Ongoing | | |
| 1.6 | Develop new training as required and partnership opportunities arise | Office/ Training Committee | Ongoing | | |
| 1.7 | Review current a.v. and propose updates and potential partnerships | Training Committee/ ED | Ongoing | June 2017 | |
| 1.8 | ELT contract expiry | Training Committee/ ED | | Mar 2020 | |

Strategy #2: Communication & Events

To improve communication and relationships between all of the stakeholders.

| From | To |
|--|--|
| <ul style="list-style-type: none"> <i>Promotion of ourselves</i> | <ul style="list-style-type: none"> <i>Increase promotion and address new opportunities to promote association through social media outlets and conventional methods</i> |
| <ul style="list-style-type: none"> <i>Some activities in regards to government, AEP certification</i> | <ul style="list-style-type: none"> <i>Greater presence and proactive dialogue with government</i> |
| <ul style="list-style-type: none"> <i>Informed membership</i> | <ul style="list-style-type: none"> <i>Enhanced opportunities for involvement</i> |
| <ul style="list-style-type: none"> <i>Communication currently acceptable</i> | <ul style="list-style-type: none"> <i>Communication focused on “What’s in it for them” and address new opportunities</i> |
| <ul style="list-style-type: none"> <i>Informed executive</i> | <ul style="list-style-type: none"> <i>Updated orientation link within Executive Login Area of website</i> |

Communication & Events Strategy Strategic Action Items

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| | Action | Who is Responsible | Start Date | End Date | Status |
|-----|---|---------------------------------|-------------------|-----------------|---------------|
| 2.0 | Review Communications Committee – Potential to change into events committee | Executive Board | March | June/17 | |
| 2.1 | Provide information articles to WCW & AUO | WCW REP COMM COMMITTEE/ OFFICE | Ongoing | Ongoing | |
| 2.2 | Explore app development as needed | COMM / ED COMMITTEE | Ongoing | | |
| 2.3 | Succession planning for executive – email blast with nomination form sheet | COMM / ED COMMITTEE | | Ongoing | |
| 2.4 | Water Week – Review Success/ Growth/ Expansion Ideas/ Improvements | Comm & Events Committee/ Office | Annually | Oct/ 2017 | |
| 2.5 | Host minimum of two networking events each year | Comm & Events Committee/ Office | Annually | Ongoing | |

Strategy #3. Membership

To increase membership through improved communication, program satisfaction while raising the profile of the members.

| From | To |
|----------------|-----------|
| • 2175 members | • 2250+ |

Membership Strategy Strategic Action Items

| | Action | Who is Responsible | Start Date | End Date | Status |
|-----|--|------------------------------|-------------------|-----------------|---------------|
| 3.1 | Give Free membership for one year to NAIT WWT Students | Office | Ongoing | Ongoing | |
| 3.2 | Evaluate Member Benefits and added values | Communication Committee / ED | Ongoing | Ongoing | |

Strategy #4. Operations

To maintain a sustainable efficiently staffed office to handle the daily business of the AWWOA.

| From | To |
|--|--|
| <ul style="list-style-type: none"> Dedicated staff running AWWOA Office | <ul style="list-style-type: none"> Appropriately staffed office Call upon additional resources when required |
| <ul style="list-style-type: none"> Manage staff changes as they arise | <ul style="list-style-type: none"> Succession planning; high staff job satisfaction |
| <ul style="list-style-type: none"> Understanding finances | <ul style="list-style-type: none"> Updated financial policy and objectives to meet needs of the association |

Operations Strategy Strategic Action Items

| | Action | Who is Responsible | Start Date | End Date | Status |
|-----|--|---------------------------|----------------------------------|------------------------|---------------|
| 4.1 | Review Job Descriptions | ED | Ongoing | Annually | |
| 4.2 | Determine number of office staff required/ infill position | ED | Ongoing | Annually | |
| 4.3 | Develop annual budget | Admin, ED & Finance comm | June | Oct | |
| 4.4 | Annual full audit | Admin, ED & Finance comm | Board: July ED: July | Board: Oct. ED: Oct | |
| 4.5 | Financial Advisor – Join Exec meeting | ED, Chair, Finance Chair | Twice per year June & January | Ongoing | |

Strategy #5. Annual Operators Seminar (Banff)

To develop, maintain, improve and deliver a quality seminar.

| From | To |
|--|--|
| <ul style="list-style-type: none"> <i>In house event planning with office (large), committee (larger than before) and new contractor (one part)</i> | <ul style="list-style-type: none"> <i>Continually review processes and manuals to meet needs of attendees</i> |

Annual Operators Seminar (Banff) Strategy Strategic Action Items

| | Action | Who is Responsible | Start Date | End Date | Status |
|------|--|--|-------------------|-----------------------|---------------|
| 5.0 | Establish Banff Committee | Executive Board | March | Annual | |
| 5.1 | Confirm location/facility for 2019, 2020 | Office | | March 2017 | |
| 5.2 | Update Banff manual | Banff Committee/ Office | Ongoing | Ongoing | |
| 5.3 | Organize tradeshow | Office | October | Nov – Dec Annually | |
| 5.4 | Develop preliminary budget | Banff Chair/ Finance Chair | | June - Annually | |
| 5.5 | Register participants | Office | October | March - Annually | |
| 5.6 | Develop Tech program/ workshops: <ul style="list-style-type: none"> hire contractor establish selection committee select | AOS COMMITTEE Office/ Contractor/ Banff Committee | September | January- Annually | |
| 5.7 | Select giveaways | Banff Committee | October | Nov - Annually | |
| 5.8 | Organize AV at both sites | Office/ Contractor | February | March - Annually | |
| 5.9 | Update sponsorship program | Office / ED/ Contractor | September | Sept – Annually | |
| 5.10 | Update guest program | Banff Committee | November | Nov – Annually | |
| 5.11 | Book entertainment | Banff Committee | December | Jan – Annually | |

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|------|------------------------------------|-------------------------------|----------|---------------------|--|
| 5.12 | Organize meals/coffee/refreshments | Office / ED | January | Jan – Annually | |
| 5.13 | Determine charitable donations | Banff Committee | March | March – Annually | |
| 5.14 | Annual call for volunteers | Banff Committee/ Office | Jan- Feb | Feb | |
| 5.15 | Awards | Banff Committee/ Office | Jan- Feb | Annually | |
| 5.16 | Nominations/ Elections | Banff Committee/ Office | Jan- Feb | Annually | |
| 5.17 | Wednesday Social Event | Banff Committee/ Office | Nov | Jan Annually | |
| 5.18 | Use web-based app for Seminar | Banff Committee/ Office | Nov | Annually | |

APPENDIX

KEY STAKEHOLDERS

- AWWOA Members / Operators
 - Communicate Strategic Planning Executive Summary to them via email blast, newsletter, website, Western Canadian magazine and report at AGM
 - By the Communications Committee after the Strategic Plan is approved
- AB Environment and Parks (AEP)
- Municipal Employees
- Other Associations (WCW constituency, AHMSA)
- Consumers
- AWWOA Executive
- Environmental Stewards
- Competitive – Education, Consultants
- Utility owners and other water focused/related organizations (municipalities, AUMA, AAMDC, etc.)

FUTURE ENVIRONMENTAL SCAN

- **Number of certified operators increasing (60% members and 40% non-members) ***
- **Communications, marketing, people reading/listening, seeing value of ownership, networking ***
- **Changing regulations, processes & structures at government level***
- **Competition for training, venues, courses ***
- **Changes to membership management ***
- Intellectual property/ ownership
- Economy – ups and downs
 - AB economy projections, oil & gas goes up and down
 - Impact of Europe economy
- Eco-green alignment – more stakeholders – wetland science, storm water, grey water
- Conferences, seminar by for-profit organizations – competition for training \$
- Contractors making their own rules, their own training
- Alternate training course delivery system
- Long term commitments and sustainability
- Regionalization

*** - highest priority**

CURRENT STATE ASSESSMENT

SWOT

- Members approx 2000, not all operators (75/25 split)
- \$1 million yearly cash flow for 2014-15 Fiscal Year
- Seminar location full
- 2014 survey
 - Close to 500 responses which equates to nearly 27% of members
- \$1.2 million funds in restricted reserve for evergreening, scholarships, unforeseen events
- \$700K in non-restricted reserves
- Course evaluations positive
- Conference run in-house with contractor for technical program
- Newsletter 3 x/year with support from AB Environment & Sustainable Resource Development
- Training & development/ ever greening – Review Options
- Water Week Options/ Increased Attendance
- Donate to charities
- Shortage of volunteers for board positions
- Passionate volunteers
- Staff & volunteers work hard
- Communication – keep disseminating information through AWWOA media channels
- Moving towards clearer courses and ownership & training
- Website changing
- Offer free job postings
- Avenue to sell old equipment by request
- Small community subsidy for courses – 25% course fees
- Social media
- Good reputation, well known in the industry
- New generation - Technology, learn differently, work/life balance
- Attraction to smaller municipalities
- Technology
 - How it affects certification
 - Communicate differently with members
 - How it affects the job and changes in processes
- WCW conference, NAIT, AB Provincial Council – friendly competitors
 - Marketing our training
- ESL
- Learning disabilities
- Lack of board orientation – to be improved with new website Executive log in area
- Review staff duties and consider new position
- Potential partnerships with stakeholders as opportunities arise

QUARTERLY MEETINGS

At each board meeting, the board will quickly:

- Discuss any changes in the External Environment and any implications to the Strategic Plan
- Discuss any changes to the Current State and any implications to the Strategic Plan
- Review all Key Success Measures and any implications to the Strategic Plan
- Review Strategic Action Items:
 - Changes required as a result of External Environmental, Current State and Key Success Measures reviews
 - Actions that are not on track and implications to the Strategic Plan