Strategy 2020: Our Updated Strategic Plan

Presented by:
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Process

1. SWOT Analysis
2. Balanced Scorecard Process
3. Vision/Mission Statements
4. Strategic Goals
5. Objectives
6. Tactics/Activities
7. Metrics (KPIs)
SWOT Analysis

**Internal**
- **Strengths**
  - What do you do well?
  - What are your advantages?
  - What relevant resources do you have?
  - What of these you offer other people can see as an advantage?
- **Weaknesses**
  - How can you improve your offerings?
  - What do you do poorly or not at all?
  - Is your communication up to date?
  - Is your budget availability enough to cover all advertising needs?

**External**
- **Opportunities**
  - Which are the best opportunities in the near future?
  - What are the market trends?
  - What is the best period of the year to offer your services?
  - What niche you may try to attack and cover with your offerings?
  - May you enlarge your business area?
- **Threats**
  - What obstacles, economical, coming from the market or from the competitors, are you going to face?
  - What is the worst period to promote the activity and why?
  - New technologies may affect the business trends?
  - Which are the new products that are out coming on the market and that could be considered as a threat for the business?
Strengths

• Local Chapters
• Technical Committees, Seminars/Workshops
• Brand
• Friendly/Collegial
• Number of Events
• Engagement of Core Members
• Decentralization of Activities
• Student Chapters/Student Design Competition
• Water Festivals
• Financials
• Regulatory- and Legislative-Driven Utility Council
• FWRC
Weaknesses

- Connectivity with WEF
- Level of Administrative Support
- Retention of Institutional Knowledge
- Burning out Volunteers
- Volunteer Recruitment
- Business Planning Process Complexity
- Board Rotation
- Relationship with Utility Council
- Flat Membership
- Unclear Vision
- Alignment of Organizational Structure
- Volunteer Training
- Lack of Connectivity between State Board and Chapters
- Lack of a Defining Branding Event/Activity specific to FWEA - “the hook”
Opportunities

- Leverage WEF
- Partner with Complementary Organizations/Associations
- Potential Mergers/Acquisitions
- Target YPs (GenXs/GenYs)
- Target Students/Soon-to-be College Graduates
- Target Regulatory Groups
- Outreach General Public
- Advance Image in Marketplace & General Public
- Innovation to Deliver Content
- Enhance Website
- General Communication with Membership
Threats

• Multiple Organizations Competing for Members
• Employer Support
• Burn-out of Volunteers & Members
• Organizational Structure & Processes
• Recession
• Loss of Membership to Specialized Subgroups
• Technical Information readily available Online (not through Technical/Professional Association)
• Maintaining Relevancy
• Generational Divide and Preferred Communication Method
Overview of Process

Vision/Mission Statements

Strategic Goals

Objectives

Tactics

Metrics (KPIs)

Organization Chart

Implementation Schedule
Balanced Scorecard Process

Financial Health (Internal)

Operations (Internal)

Innovation (External)

Membership (External)
Former Vision Statement

A Clean Water Environment for Florida’s Future Generations

Current Vision Statement

A Clean and Sustainable Water Environment for Florida’s Future Generations
Former Mission Statement

Preserve and Enhance Florida’s Water Environment by Supporting and Uniting Water Quality Professionals through Public Education, Professional Development, and Promotion of Sound Science-based Public Policy.

Current Mission Statement

The Florida Water Environment Association (FWEA), a leading non-profit organization, will promote clean and sustainable water environment by:

1) Supporting and uniting our members and the public through **Public Awareness**,  
2) Providing **Professional Development** of our members,  
3) Promoting Sound Science-based **Public Policy**, and  
4) Maintaining a **Strong Organization**.
Key Words for Mission/Vision Statements

- Unite
- Adapt
- Protect the Environment
- Def’n of Water (how narrow)
- Education/Knowledge
- Organizational Excellence
- Sound Science
- Public
- Members
- Policy Guidance
- Innovation
- Leading Organization
- Leverage Knowledge
- Development
- Non-profit
- Sustainability
Strategic Goals

- Supporting and uniting our members and the public through *Public Awareness*
- Providing *Professional Development* of our members
- Promoting Sound Science-based *Public Policy*
- Maintaining a *Strong Organization*
Public Awareness - Objectives

1. Position WEF/FWEA as an Information Resource
2. Educate and engage the public to become water stewards
Professional Development - Objectives

1. Provide educational opportunities to assist with licensing and certification requirements
2. Expose members to best practices and innovative concepts
3. Provide networking and career growth opportunities
4. Provide leadership opportunities
5. Engage students focused on the water profession
Sound Public Policy - Objectives

• Improve communication between FWEA and Utility Council
• Provide education opportunities/outreach for elected officials
• Promote sound science-based public policy making
Strong Organization - Objectives

• Increase membership and member engagement
• Improve leadership development
• Ensure financial stability
• Align the organizational structure and decisions with strategic goals
• Improve institutional memory
Public Awareness - Tactics

- Water Festivals
- Outreach to science teachers
- Each chapter adopt a STEM program
- WEF program – support World Water Day
- Develop communications plan with messages
- Invite media to technical seminars/FWRC on relevant public topics
- Provide media training for members
- Florida Water Week/proclamation
- Social/media posts
- Establish FEWA Public Information Officer (PIO)
- Develop technical web content as it relates to public
Professional Development – Tactics

- Technical Seminars
- Annual Conference - FWRC
- CEUs/PDHs
- Annual Awards
- Student Design Competition
- Scholarships
- Luncheon Meetings
- Local Chapter Meetings
- Operations Challenge
- Publications – FWRJ, FWJ, Droplet, Chapter Newsletters
- Develop/expand Mentoring program
- Membership directory/guide
- Webcasts/on-line content
- Advertise WEF webcasts
- Leverage WEF content/YouTube/webcasts/white papers/ppts
Sound Public Policy - Tactics

• Utility Council on FWEA Board
• Provide technical expertise to the Utility Council for their policy position development
• Expand FRWC tract to entice public official participation
• Legislative Days
• Hold Big Ben/Tally Florida Water Festival on Legislative Days
Strong Organization - Tactics

- Hosting WEF officials
- Promote FWEA only membership
- Develop membership brochure
- Develop web store on website
- FWEA shirts for brand
- Leadership development workshop
- Executive/financial manager
- Email blast communications
- Interaction with Student Chapters
- Maintain healthy treasury reserve
- Improved budgeting process
- Update policies & procedures manual
- New member on-boarding program
- New leader orientation guidance documents
- Develop concise, easy to read/find guidance documents
- Outreach to other stakeholders (i.e. regulators) to strengthen membership
<table>
<thead>
<tr>
<th>STRATEGIC GOALS</th>
<th>OBJECTIVES</th>
<th>ASSOCIATED TACTIC(S)</th>
<th>ASSOCIATED METRIC(S)</th>
<th>TARGET FOR EACH METRIC</th>
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</thead>
<tbody>
<tr>
<td>Supporting and uniting our members and the public through <strong>Public Awareness</strong></td>
<td>Educate and engage the public to become water stewards</td>
<td>Participate in charitable, community, and educational forums as FWEA representatives</td>
<td>Number of activities attended (by type) and approximate number of public reached per activity (by general age category of grade school/high school/adult)</td>
<td>Participate in 10 activities per year</td>
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<tr>
<td>Position WEF/FWEA as an Information Resource</td>
<td>Expand dissemination of info online via the website and posts to social media</td>
<td>Number of new articles/posts on website and social media</td>
<td>12 per year</td>
<td></td>
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<tr>
<td>Providing <strong>Professional Development</strong> of our members.</td>
<td>Provide educational opportunities to assist with licensing and certification requirements</td>
<td>Hold training events with PDH/CEU opportunities</td>
<td>Measure number of events—tracked by type, location, no. of attendees, no. of PDH/CEUs issued</td>
<td>6 events per year, with a minimum of 3 regional seminars</td>
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<td>Engage students focused on the water profession</td>
<td>Support of student activities by local chapters</td>
<td>Number activities local chapters do to support the student chapters (track by type: scholarships, participation by students in local chapter activities, outreach to their local students meetings, events to support SDC)</td>
<td>3 activities per student chapter per year</td>
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<td>Conduct student design competition annually</td>
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<td>Minimum 4 schools participating per year</td>
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<tr>
<td>Promoting sound, scienced-based Public Policy</td>
<td>Improve communication between FWEA and Utility Council</td>
<td>Member of ExCom participates in utility council meetings</td>
<td>Percent of UC meetings with ExCom member participation</td>
<td>100% per year</td>
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<td>Promote sound science-based public policy making</td>
<td>Publish articles on the annual legislative session and other relevant “hot topics”</td>
<td>Number of articles per year</td>
<td>2 articles per year</td>
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<td>Maintaining a Strong Organization</td>
<td>Increase membership and member engagement</td>
<td>Grow membership annually</td>
<td>Track number of members by chapter and by category (student/YP/full/FWEA-only/etc)</td>
<td>3% growth per year in total number of members</td>
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<td>Ensure financial stability</td>
<td>Maintain healthy reserve balance to cover potential liabilities</td>
<td>Amount of FWEA-only reserves versus expenses for FY</td>
<td>50% of FWEA-only expenses for FY maintained in reserve, set annually in budget, with quarterly updates</td>
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<td>Improve institutional memory</td>
<td>Update and maintain a user-friendly Policy &amp; Procedures Manual</td>
<td>Number of times P&amp;P manual is updated</td>
<td>Complete initial update of entire P&amp;P manual within 12 months. After first FY, continually update P&amp;P manual for each board mtg</td>
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