



April 8, 2021 | 2:00 - 4:30 pm ET | Social 4:30 – 5:00 pm ET
Hosted by the WEA of Utah
Zoom Meeting/61 Participants

Welcome

- **Clint Rogers**, *WEF Delegate & Chris Reilley WEAU President* - Host Welcome. President Rogers stated there are 654 members where 54% of them are PWO. Mr. Rogers added, “We are an all-volunteer organization. We have an annual conference and a mid-year highlighted by ops challenge and tech sessions featuring exhibitors. One of our main goals is to help our members grow.”
- **Ifetayo Venner**, *WEF Vice President* – WEF welcome, “I am excited to be kicking off the first virtual WEFMAX of 2021. The staff and the volunteers have been working hard over the last several months to put together an awesome virtual program. Thank you for being the first virtual hosts. Hopefully, I can visit in person. Over the course of the next few WEFMAX programs, I will try to update you as often as we move forward. The WEF Board continues to meet – for now – virtually. This week we are having a call-out for nominations for the WEF Board; so, think about it seriously. Thank you to the WEF staff regarding conferences, and with COVID communications with MA’s. WEF MA staff put in a lot of work with the Leadership Series and WEF has launched the DE&I subcommittee at the Board level and hired a consultant to guide us through our efforts. Additionally, WEF is launching a new strategic planning effort. Last strategic plan was updated in 2018. Also, the WEF Wastewater Treatment fundamentals II solid handling book is now available, and In-FLOW is taking applications until the end of April. If you have a school which is interested in participating, visit the WEF.org In-FLOW info page. Lastly, we are planning for an in-person WEFTEC with some virtual components.
- **Nikita Lingenfelter**, *WEF House of Delegates Speaker* – HOD welcome. “Thank you to Utah and we hope to have a future in-person WEFMAX soon. Thank you to the WEF staff and Mike Milius and the WEFMAX committee for always being on top of everything. There is a lot of work which goes into a WEFMAX and we appreciate all that you do. Normally at WEFMAX we hold our HOD meetings, but we are holding them quarterly outside of WEFMAX. They have been replaced by our quarterly HOD meetings. Our HOD Nominations are opening on 01 May for Committee or HOD leadership/Delegate-at-Large positions, we need your applications and would love to have you. If you know anyone interested in the Delegate-at-large position, we are looking to expand how we outreach to other groups, nations, we want to expand and ensure we are providing for an inclusive environment outside and inside of WEF. Our HOD monthly updates – we have been doing interviews highlighting delegates, and I have to say that what we have been doing has grown. We have our own stories and want to share our delegates’ water stories. This next interview coming up is very important, powerful, and timely. Finally, we have a very robust program today and thank you for having us.”
- **Mike Milius**, *WEF House of Delegates WEFMAX Committee Chair* – welcome/program, “Thank you for attending the 1st 2021 WEFMAX. Thank you to the committee members and the

WEFMAX committee. Much time and effort has been put in and thanks to Dianne Crilley and WEF Staff. Upcoming WEFMAX's to attend are April 22nd PA WEA, May 6, Pacific NW WEA, May 27th Atlantic Canda WEA. The WEFMAX YP Summit will be April 21st.

Session I – Host Topic

Chat Moderator – Trevor Lindley (Utah President-Elect)

Treasure Island: Financial Stability & Protecting MAs during COVID-19 and Other Unforeseen Events

Presenter: John Richardson

- Our theme is surviving on a deserted island. How do we survive and what are the basics, and can we prepare for the storms and what are the lessons learned? When we survive, how can we thrive?
- Basic Rules: Define Operating Costs, Ensure Revenue Cover Costs, Est. Budget Allocations Based upon Actual Data, Provide Monthly Financial Reports to the Board and Invest in Members.
- Prepare for the storms: We have had economic downturns which influence membership. Questions, how many recessions since 1970? Seven
- Risks: Litigation, Cyber Threats, Reduced Membership, Lost Revenue due to Cancelled Events. Annual membership dues and annual conference are our large revenue sources.
- Challenge: Ended FY with a \$20K deficit, Unexpected Student Activity Committee Expenses, Investment Account lost Money during 2009-2010 Economic Downturn.
- Ways to Thrive: Establish a Rainy-Day Fund, Utilize Merchant Account for Events and Membership and Prepare Financial Reports with Accounting Software (Quickbooks).
- Survival: Never Give Up.

Questions:

- What is your annual budget? \$125-145/yr.
- Are your Directors/Officers protected against insurance? John Richardson can send a copy of Utah's policy.
- Investments? We are in money market accounts (Board-Level Decision)
- What is your rainy-day fund? We are over 100K

Breakout Session I Questions: What are your fixed costs to keep the doors open; what does that look like and what will you do different post COVID 19?

Comments:

Kathy Richards (OH), "We received both rounds of the PPP. We did not see a decline in membership per se. We were able to not pay fines due to cancellation of conferences." **Denise Epling** (Michigan WEA), "We saw more people take our virtual training and even gained new members from that virtual training." **Jeff Beckman** (Utah WEA), "Our annual conference is next week, and we reduced our registration to \$100 and we're looking to have a very robust conference." **Jamie Eichenberger** stated, "the networking in the virtual world seems to struggle. What I thought worked well was WEFTEC Connect where 20 people were in a room or where 100 people were in a zoom call with facilitators."

Jeff Beckman (Utah WEA) asked, how much are other MA's getting in sponsorships? Participants replied, "Vendors, Engineering firms, Contractors & Consultants provide sponsorship money and it's very lucrative."

Breakout Session Report

Jeffrey McBurnie (New England)

Hired paid staff when they found their revenue was good, set aside money for a rainy day, paid scholarship. Let volunteers work how volunteers should.

David Arnott (Central States)

We want to pay for the big stuff without income for 1 year, do we have some in reserves. Only the Exec Dir is paid.

Allison Wood (Michigan)

Want to be able to run big things and have a few paid staff, did have to dip into rainy day this last year- that is what it is for!!

Michael Welke (Ohio): Have paid staff and rainy-day fund. Put money away for an op challenge team. of 6 in break out, 4 have teams regularly in op challenge, 2 do not.

Jeffrey McBurnie (New England)

Op Challenge is a good way to "give back to the operators", great way to sponsor.

Pandemic fixed costs can be different than normal fixed costs.

Funding the op challenge is not as big a problem in some places as getting enough interest.

Laura Oakes (Chesapeake)

Room 2 - Everyone seemed to know their fixed costs; will continue to offer virtual events going forward.

Calvin Reilley (Utah)

Most could function 1/2 to 1/3 less.

Melodi Clark (Ohio)

Due to most events at the WEF level like WEFMAX and WEFTEC being virtual MA's saved money so the budgets did not take a huge hit.

Casey Gish (Pacific Northwest)

- Utah canceled event but did not have high cost of hosting event, reflected on bare bones operating costs (insurance, GoToWebinar) \$35K
- Nebraska, all volunteer, cost of keeping website current, canceled events. 25 - 30K per year. 3 organizations collaborate on conference, lead rotates around. Revenue and expenses shared. The other 3 organizations are APWA, AWWA, and WEA - three organizations that share. conference responsibilities. Conference shares a single bank account.
- Illinois WEA, conference biggest income, canceled last year. Net negative last year but did not devastate organization. Annual budget around \$200K, minimum costs around \$30K. Reserve

account to keep 50% operating budget.

- Utah WEA did not charge for conference last year. What did Illinois charge last year? \$15/CEU member charge and \$30/CEU non-member.
- Illinois set bar of 10 attendees per webinar as a success, had closer to 30 or so attend

Ellen Frketic (Chesapeake)

- We all knew our fixed costs.
- Chesapeake and PWEA have found sponsors to be very generous this year because engineering firms and contractors are all busy.

Melodi Clark (Ohio)

- Most went to virtual options like webinars and having their annual conference virtual.

Jamie Eichenberger (WEF)

- No one had a plan in place prior to the pandemic, but quickly looked at savings vs. revenue and put a plan in place.
- Many MAs with paid staff were able to take advantage of both rounds of PPP loans.
- Sponsors and exhibitors have been very supportive throughout the pandemic and kept revenues up.

Calvin Reilley (Utah)

- Need to get new mindset to how we must get revenue.
- WE saw through this crisis our places of vulnerability.

Frederic Smith (Ohio)

- Did any other MA's get PPP loans?

Laura Oakes (Chesapeake)

- Noted virtual events allow for folks to attend that may not be able to attend in-person events; however, networking and marketing are not as well executed as in-person.

Calvin Reilley (Utah)

- We discussed quite a bit of the likely push of some managers wanting us to do some form of a hybrid conference.
- We also talked how this has shown us some of our vulnerability as associations and how we need to adapt for our members and the need to find other ways to find income.

Session II - WEFMAX MA Topic

Chat Moderator – Marianna Sochanska

Making the Most of Your Virtual Conference

Presenters: David Arnott & Tracy Ekola, Central States WEA

- Background & Timing: 2002 Annual Conference was set for mid-May; we soon realized an in-person meeting was not an option. We had to change everything, cancel events, coordinate speakers/meetings, etc.
- We had to find the best virtual platform and pull this off.

- Our model was we had to create things on the fly. Mohammed Haque led the decisions. He took control and did a great job with making things happen. Most important thing of our annual meeting was our tech. program. We reduced reg. fees and provided exhibitor refunds, we went to recorded presentations, we had a live keynote address and enhanced sponsorships and commercial opportunities.
- We used the Pheedloop Platform. A great fit for our program.
- We changed the organization of the meeting allowing people to check in/out when they would like.
- For our tech. sessions, we went with a pre-recorded session where attendees could view up to a year after the event.
- Successes: Commercials for Exhibitors, Creativity, Culture, Fun to Watch. Sponsorships were premium and this provided a higher visibility than in-person.
- Attendees: 400, down slightly, Revenue was down \$120K, Expenses were down \$61K and net was \$25 less than budget.
- Challenges: Exhibition Hall – How to Engage Exhibitors? Question? How much of cost went to Pheedloop? \$30K
- Challenge which remains: How to engage exhibitors?
- Awards: Did not have a virtual program in 2020
- Keys to Success: We hired a tech. consultant. The Association got out of the way and no red tape, we made the rules as we went and demonstrated value to the attendees. Pheedloop was very valuable to us. It allowed for a multiple track event.
- Future? New virtual paradigm for attendees to gain credits, understand networking is not the same in the virtual environment. Recorded presentations.

Question:

With three different platforms, do you have yearly membership for each or monthly? “The cost of the 3 platforms were gained back in the specific cost for the event: example by registration costs.”

Chat:

Trevor Lindley (Utah)

- WEAU has purchased GoToWebinar for up to 500 attendees at about \$2K per year.

Mohammed Haque (Central States)

We purchased annual contracts for Zoom, GoToWebinar and Pheedloop

Jamie Eichenberger (WEF)

<https://www.wef.org/advocacy/water-advocates/>

Breakout Session II Question: What virtual platforms are MA’s using and is your MA considering permanently implementing the new virtual model?

- Dave Arnott, CSWEA uses zoom and GoToWebinars for a higher attendance event.
- CSWEA uses Pheedloop for our larger conferences. It is good for many tracks and has even more functionality.
- CSWEA is considering implementing virtual permanently for smaller topics which will reduce costs.”

- All our participants felt they were missing out on the networking aspects when we went virtual.

Breakout Report Session #2

Megan Borrer (Ohio)

- Ohio uses Conference Tracker and GoToWebinar
- Conference Tracker rate is per event or bulk events.
- Ohio has specific requirement, including a quiz, for contract hours and Conference Tracker met those requirements.
 - It was very economical.
 - Same platform we use for scanning at in person events.
- Our sections do a lot of our education. One month we had 4 different offerings and we were watering down our attendance.
- From the state standpoint, we are doing an in-person conference with a much smaller virtual option.
- In 2020 we will continue one-hour webinars once a month. We want to make sure the virtual element never replaces the in-person.
- Mixed success with 100% pre-recorded virtual conference. Used GoToWebinar.
- Membership would rather meet in person. Hosting in person 2021 conference.
- Hosting pre-recorded virtual sessions for membership not available to attend in person conference. Large utility attendee concerns.
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Allison Wood (Michigan)

- Michigan uses Zoom Whova, and Hopin platforms
- Doing i-person with a live streaming option. We can have 200 people attend.

Mike Milius (Nebraska)

- Nebraska uses Zoom and Whova.
- We have concern if we do a low-cost continuing education we will shoot ourselves in the foot with our annual conference.

WEF

- Zoom, GoToWebinar, Remo
- Remo offers you different things to make it more visually appealing.

WEA of Utah

- Utah WEA - Conference next week. Using GoToWebinar. Two parallel tracks. \$2K fee. So far has worked well for monthly presentations/meetings.

Illinois WEA

- IWEA uses Whova for virtual events. Plans to be in person next year, not planning on implementing a virtual conference in the future. Live trivia and networking for InFlow program attendees. Two-week conference, videos available for 60 days after conference. Live Q&A after each session.

Clean Water Professionals of KT

- Switched conference from July to September. Large utility attendee concerns.

Calvin Reilley (Utah)

- Switched conference from July to September. Large Utility attendee concerns
- We have used GoToWebinar for 4-5 years so shift was not too hard.

Jamie Eichenberger (WEF)

- Most everyone in our breakout was going to try to do a hybrid event, in-person and virtual moving forward.
- Platforms included: Pheedloop, Cvent, Precis, and GoToWebinar
- Drivers were cost, state CEU requirements, and combined functionality for conference AND tracking EDUs.
- The challenges with virtual go beyond just the conference, and need to consider abstract collection and review, program development, and CEU administration.

Calvin Reilley (Utah)

- One used both Zoom and hop-in

Jeff McBurnie (New England)

- We have 9 different platforms.
- All have their plus and minuses, but they all do the same thing.
- There needs to be a way to verify active participation whether it be a poll etc..

Tracy Ekola (Central States)

- GTM, AnyMeeting, and Zoom were the common responses in our breakout room.
- Quiz and survey capabilities for GTM were used for PDH/CEU.
 - Some hiccups but it worked.
 - Other challenges incurred initially to make sure everyone had the specific platform on their computer or ability to link.
- Most will continue to use GTM or Zoom.
- At least one MA is going to offer a virtual component in the future to augment in-person events.
- Very successful virtual meetings although not the same as in-person.
- Not as many used breakout groups or their platform did not offer breakout groups.
- Pheedloop had a PDH certificate capability.

Session II – WEFMAX MA Topic

Moderator – Chad Burrell

Operator Training Initiatives

Presenter: Allison Wood – Michigan WEA

- Staff four, with 2000 members and hiring 2 more staff and 11-member Board
- Joint Expo & Operators Day: 2-day conference in February in Lansing, MI. Focus is on operators. First held in 1992 and represents about 10% of annual income. Topics: Electrical, GIS, SCADA, Valves, Motor Testing, Safety & Cyber Security. 8 Presentations are selected. 300 attendees per

ballroom. Different agenda every day. During the afternoon we have lunch and explore the exhibit hall. 2020 was our largest year with 1,125 in training and 509 for the exhibit hall. 2021 was virtual with the same time frame and we had over 600 participants over the 2-day event. Offered on-demand is available. We used sproutvideo.com for tracking. The vendors were not interested in the virtual exhibit hall. Our goal was fifty, but we can in under ½ our goal. Our net revenue was down 40%. Hope 2022 we will be back in person.

- Operator Training Classes: We have 13 classes available. We offer 2/3 classes/year. All attendees receive a course workbook. Added operator prep classes and very popular with 10-15 students/class. There are four levels in MI for the operator's license. We hosted 40 classes with over 200 attendees. 2021 22 classes YTD, expect to be at 50-60 by EOY. 250 attendees YTD. **Developing 10 new classed funded by WEF seed grant money.** WRRRT Credential Program was developed to encourage those who are new to the industry
- Operator Training Classes & Operator Scholarship: WRRRT Future Leadership Scholarship. We offer 4/year which can be up to \$1,000/award. Contact: awood@mi-wea.org

Questions from Chat:

- How is the stipend determined? Set price/class (All-day rate)
- Are the certification exams administered electronically, on paper or a combination? "Eagle" (the MI Regulatory Agency) handles all the exams, and we only do the prep for the exams in-person.

Breakout Session III Question: How did the operator initiatives change during the pandemic and what do we keep doing going forward? What impact did the pandemic have on the operator training?

Jackie Jarrell (WEF)

- There are several things that WEF is doing, spec., skills based training and new operator fundamentals translated into Spanish, and in the strategic plan there is a goal for WEF to lead the initiative to more toward a national certification (not necessarily to create it but to "lead" it.)
- WEF member operators will join the MA's and then at the WEF level we have resources we can share with the MA's and with the operators.
- We had more operators attend WEFTEC due to it being virtual. We also have a blue-ribbon panel to determine what level/type of PPP to utilize for workers."

Calvin Reilley (Utah)

- We thought the pandemic would only last a month and we'll hold off on training.
- Then we moved to webinars.
- We went with WEF's fundamentals book.
- The pandemic slowed our progress down more and then we decided each entity would have to do their own training(s).
- Been meeting with my folks and training them personally. We have had to be adaptive and asking other entities how we can help.
- Having the annual conference allowing CEU's will assist the operators.
- It is tough getting the operators involved and we are putting in a lot of effort.
- We call them and support them.

- Before our cert. test we do a 2-day training which helps them fine-tune things and the classes are full.

Mike Milius (Nebraska)

- NE took over training when the state stopped in 2008-2009.
- At our Fall conference we had more attendance by a factor of over 50% of people to get hours.
- We are starting in May with an in-person event. But what will it look like?
- Many questions remain.

Kylee Daily (Indiana)

- It is a struggle to get our training back up and seems like the operators do not want anything to do with virtual training. Its tough for the utilities to train in the pandemic.

Melodi Clark (Ohio)

- We have webinars every month.

Breakout Session Report

Allison Wood (Michigan)

- One thing we did for the Virtual Operators Day this year was offering a test session the week prior.
- Attendees could join and test their audio, play around with the platform settings, etc. to make sure they were comfortable for the live event.

Trevor Lindley (Utah)

- Some observance that other entities such as Rural Water either overlap or almost 'compete' with MAs are trying to do.

Susan Sullivan (New England)

- We do not have places to take the exams.

Calvin Reilley (Utah)

- We did small sessions with only 8 guys who were spaced apart over a week.
- It allowed us to at least do something.

Chad Burrell (Utah)

- Seems like the States are not comfortable with virtual credits. Chad was the contact with the State allowing the CEUs to be provided to an operator.

Clifford Fletcher (Alaska)

- Alaska Certification & Training has not seen a significant change in the pass/fail overall for certification exams whether they be online or in person.

Calvin Reilley (Utah)

- We need to have a good relationship with the operators. They are feeling a disconnect and make them know they are supported by everybody.

Chad Burrell (Utah)

- Let's plan our training around operators.

Mike Milius (Nebraska)

- In Nebraska we team with AWWA / SWANA / APWA for conferences.
- Rural Water has not been very receptive to working together.

Clifford Fletcher (Alaska)

- Overall pass rate in Alaska for all exams is about 50%

Jeff McBurnie (New England)

- Great program! Thanks for all your efforts!

Ellen Frketic (Chesapeake)

This was great - thank you so much!!!

Michael Sedon (Pennsylvania)

PA all the WAY!!

Clifford Fletcher (Alaska)

- This was great!! Thank You Utah and all our presenters!!

Clint Rogers (Utah)

- Thanks for attending. Next WEFMAX April 22, 2021, hosted by Pennsylvania.

Coming Up Collection System Jeopardy!