



Strategic Plan

Version 4.0

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Core Ideology **(Timeless)**

Core Ideology describes an organization's consistent identity that transcends all changes related to its relevant environment. Core Ideology consists of two notions: **Core Purpose** – the organization's reason for being – and **Core Values** – essential and enduring principles that guide an organization.

Core Purpose

To facilitate our member's success by accomplishing together what we cannot accomplish alone.

Core Values

- Professional, credible and trustworthy
- Innovative - promoting cutting edge technology
- Collaborative – promoting collaboration and networking
- Continually raising industry standards (knowledge)
- Building relationships to enhance member success

Mission (Service Niche)

Mission – 3-5 year service niche focused on essential needs of members no other organization is better positioned to meet. Three to five-year time frame; reviewed every year by the Board.

Mission

To promote the viability, growth and development of our members by being the premier water technology and business resource for our industry.

Envisioned Future (Vision) **(5-7 Year Time Horizon)**

Envisioned Future or Vision conveys a concrete, but yet unrealized, vision for the organization. It serves as a clear and compelling catalyst, a focal point for effort.

Vision

AWT will be the voice of the global water treatment industry. AWT will provide its members with the resources to meet the challenges of tomorrow, including certifications and the tools to apply innovative technologies, while promoting environmental stewardship.

Areas of Strategic Importance (ASIs)

Vision, Goals, Objectives (Measures of Success), and Possible Strategies

Vision is a description of longer-range success (5-7 years into the future).

Goals describe the outcomes association will work to achieve. Three year time frame; reviewed every year by the Board.

Objectives (Measures of Success) describe what would constitute success in observable or measurable terms. They should be reviewed every year by the Board as part of a process of reviewing progress and updating the plan.

Strategies describe how the association will commit its resources to accomplishing the goal. They bring focus to the operational allocation of resources. They indicate an activity - redesign, refine, identify, revise, develop, implement, create, establish. They should be reviewed every year by the Board and/or committees for effectiveness and modified as deemed appropriate.

ASI #1: THE CWT DESIGNATION

VISION (5-7 year timeframe)

- The CWT designation is the industry standard for excellence – representing dedication to the industry, buy-in to the Code of Ethics, and knowledge that sets CWTs apart from those without the designation.
- Advanced certifications (Legionella, etc.) are available and valued.
- Recertification is recognized as maintaining relevance of knowledge in the water treatment field.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: The CWT designation will be recognized as the industry standard of excellence.

Objectives (Measures of Success)

- AWT companies acknowledge the value of the CWT.
- Increased awareness of the CWT in target markets.
- Increased number of individuals with valid CWT.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Develop the next generation of the CWT exam to insure the program progresses	1. Select Ad Hoc Committee Members. 2. Make forthcoming exams appealing and relevant to the international market.	1	Dec 2009	Committee	\$35,000	
Enhance awareness of the CWT designation in target markets (Mechanical contractors, Equipment manufacturers, Engineering Societies).	1. Promote CWT when AWT exhibits at trade shows 2. Work with RTOs to promote CWT	2	Ongoing	Committee, Staff, Mar/Comm	In Mar CMT Budget	Ongoing
Provide members with tools to promote the value of the CWT.	1. Develop bid specifications for contractors emphasizing on CWT 2. Work with Mar/Com on the promotion of CWT bid specs	3	February 2010	Committee	\$0	In Progress
Develop new certification designations to insure the program progresses, such as: Legionella certification Certified Technical certification	1. Survey of membership on validity of new certifications 2. Study what is going on in terms of ASHRAE & internationally with regard to Legionella 3. Begin construction of the Certified Water Technician program.	4		Committee		
Design and development of CWT promotional materials	1. CWT ID Cards 2. CWT Decals 3. Code of Ethics plaque	5			\$3,000 \$5,000	

Develop CWT renewal quizzes.	Create a minimum of 5 new quizzes each year.			Committee	\$0	
Review all documents for legal purposes	Clean up Policies & Procedures RE: the remote proctor exam guidelines			Committee Staff	\$0	
Explore ways to better identify those in the industry, e.g., the designation of water treatment in the SIC codes.	<ol style="list-style-type: none"> 1. Identify and contact individuals qualified to take the CWT exam. 2. Identify end user groups and communicate the benefits of the CWT program to them. 			Staff & Committee		
Enhance and communicate the value of the CWT designation to AWT companies.	<ol style="list-style-type: none"> 1. Update CWT promotional material to clearly reference international members. 2. Continue to promote CWT in AWTGram, mailers, website, etc. 3. Proof & monitor CWT documents regularly to check for accuracy. 			Staff		
Develop ways of demonstrating the value of the CWT (e.g., Does a CWT result in a better treated system? Is a CWT more capable?)	<ol style="list-style-type: none"> 1. Survey CWTs 2. Survey CWT's customers 			Staff		

ASI #2: THE AWT Convention

VISION (5-7 year timeframe)

- The AWT Convention:
 - Is the forum where networking among members and between vendors and customers occurs.
 - Is the forum where vendors introduce new technologies and products to the marketplace.
 - Is the most well attended conference in the water treatment industry.
 - Is the place where the best and highly relevant technical papers and presentations are given.
- Content from the Convention is available to all interested parties through many formats of communication.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: The Convention will be a financially successful forum where (a) networking among members and between vendors occurs and (b) the best and highly relevant technical papers are presented.

Objectives (Measures of Success)

- Meet the financial goals set by the Board on the profitability of the Convention.
- Improved quality of technical articles.
- Increased number of business papers.
- Increased number and variety of vendors for the Exposition and sponsorship.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Develop and implement strategies prior to the Convention to increase attendance and participation.	<ol style="list-style-type: none"> 1. Market the Convention at least six months in advance with discussion of content, and benefits of attending. Put convention papers online in advance for attendees only and market this more heavily. 2. Survey members as to who their suppliers are as potential exhibitors. 3. Develop various levels of packaging for exhibiting, advertising, and sponsorships. 	1		Staff		
Provide a variety of opportunities at the Convention to enhance the value and nature of the experience.	<ol style="list-style-type: none"> 1. Increase networking & “fun” events. 2. Board members to mentor new members and help them find their way around the Convention. 3. Information from CVB about the site and things to do in the area. 4. Have a mixer or other fun event 	2		Staff & Committee		
Increase interaction at the Convention	<ol style="list-style-type: none"> 1. Make the AWT Convention more interactive – more small groups, discussions and workshops. 2. Water treatment 101 with Bill Pearson 	3		Staff and Committee		
Develop a comprehensive business and technical program to increase member awareness and education.	<ol style="list-style-type: none"> 1. Determine long-term needs of membership. - How can AWT better meet those needs? 2. Give consideration to value received by membership in attending meetings. 3. Continue to improve quality of presenters and timely topics. 	4		Staff & Committee		

Areas of Strategic Importance - ASI #3: Education

VISION (5-7 year timeframe)

- The AWT is viewed as the primary source of training and education in the industry.
- In addition to existing training materials, new education/training segments include:
 - DVD/On-line and webcast series;
 - An advanced training segment;
 - A sales training segment;
 - A major segment in water reuse training;
 - A green building technology segment; and
 - Legislative/regulatory issue-related training.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: AWT will be viewed as the premier source for training and education in the industry.

Objectives (Measures of Success)

- Members and other industry stakeholders indicate (through survey) that they view AWT as the premier source for training and education in the industry.
- Increased member participation in training courses.
- Measurable increased involvement in the education and training courses from individuals outside of the AWT membership.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Develop a state of the art Sales Training segment for members	1. Request BOD to select and review for content training. 2. Make the segment available through online access or webcasting.	1	Ongoing	Committee & Staff	No development cost to organization	Product was developed. BOD is requested to direct the committee on any additions or changes.
Develop online and interactive training programs	Evaluate possibility of offering different levels of training (e.g., operator, technician, manager)	2	2009 - 2010	Staff & Committee	NA	Professional filming should be done.
Develop content for the 2009 Convention.	Develop a Legislative/Regulatory segment for members.	3	On-going	Committee	NA	Farmerie has the presentation
Promote the content and benefits of existing training programs.	1. Continue member survey's & get feedback 2. Use quotes in promotional materials	4	On-going	Staff		Completed for 2008 courses
Develop an advanced training course	1. Survey membership 2. Determine topic needs (RO, Wastewater, Pre-treatment, potable, corrosion, etc.) 3. Develop training programs	5	ASAP	Staff	?	Not Done

Areas of Strategic Importance - Legislative/Regulatory

VISION (5-7 year timeframe)

- AWT provides valuable legislative & regulatory information to members & the profession.
- AWT members recognize the value that AWT provides in the legislative/regulatory area.
- Members have confidence in AWT legislative alerts and look to the alerts to determine what will impact their business.
- AWT identifies and communicates the latest legislative/regulatory issues and changes that will affect members.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: AWT members will recognize the value that AWT provides in the legislative/regulatory arena.

Objectives (Measures of Success)

- Increased member understanding of the value of the *AWT Update* (as measured via survey).
- Increased readership of the *AWT Updates*.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Continue to enhance <i>AWT Updates</i> .	<ol style="list-style-type: none"> 1. Reevaluate <i>AWT Update</i> format - look at length of the Updates – summary should be clear and concise 2. Include in the <i>AWT Updates</i> an opportunity for members to provide input regarding leg/reg issues about which they would like more information. 3. Include links to the AWT or other websites to get more information about legislation. 	1	Nov 09	Staff & Committee	\$0	Ongoing
Engage Associate Members and Consulting Members in legislative/regulatory issues.	Engage Associate members to create a self-audit checklist for members to evaluate their compliance with health, safety and environmental (H,S,E) regulations	1.5	Dec 09	Committee & Staff	\$0	
Develop mechanisms to keep <i>Regulatory Overview</i> fresh and updated.	<ol style="list-style-type: none"> 1. Create Procedure 2. Update Overview every year 3. Create an FAQ on how to use the document 	2	Aug 09	Committee	\$0	
Become a legislative resource for members	<ol style="list-style-type: none"> 1. Publish a paper that guides members the CFRs for specific product usage and applications 2. Keep members update on NFPA information 3. Create a safety training video 	3	2010 Ongoing 2009	Committee & Staff	\$0 \$0 \$25,000	

ASI #5: Marketing/Communications

VISION (5-7 year timeframe)

- AWT is seen as the preeminent authority in the water treatment industry.
- The industry sees the CWT designation as the standard for excellence.
- The AWT supports CWTs.
- The industry sees the AWT as the premier resource for technical and educational information.
- Members view the AWT as the catalyst for bringing water treaters together.
- Members recognize the value of AWT membership and financial and informational benefits provided by the Association.
- Members feel the AWT website is clear, concise, easy to navigate, and professional.
- The AWT is partnering with other organizations in the water treatment industry to enhance member success.
- The AWT is viewed by other trade organizations as an industry leader; they seek AWT expertise and involvement in their organizations.
- The *Analyst* is the magazine in the water treatment industry that everyone reads.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: AWT will be seen as the preeminent authority in the water treatment industry.

Objectives (Measures of Success)

- Survey the membership to determine their views of AWT in comparison to other organizations in the industry.
- Increased hits on the AWT website.
- Survey industry leaders and members to determine their views of the CWT.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Promote 2009 Convention	1. Blast emails 2. Articles 3. Notices 4. Mailings	1	Aug 09	Staff Committee		In Progress
Establish the CWT as the industry standard of excellence in order to reinforce AWT's position.	1. Support the Bid Specs program 2. Identify end user group and communicate the benefits of the CWT program to them.	2	Nov 09	Committee & Staff	\$0	
Ensure the AWT website is an important resource for the water treatment industry.	1. Research Online Webinars 2. Continue to promote listservs 3. Ensure website optimization 4. Consider Buyer's Guide online 5. Research Online Mentor program	3		Staff	\$2,000 TBD TBD	
Use existing and develop new AWT materials to enhance visibility, increase revenue, and reinforce the AWT brand.	Create AWT University/SEED Program	4	Aug 09	Staff & Committee	\$0	

Promote AWT & CWT in the industry.	<ol style="list-style-type: none"> 1. Target one market to increase visibility and knowledge 2. Exhibit/sponsor at their convention <ul style="list-style-type: none"> o Write articles for the trade publication o Present at conference o Develop and run advertising campaign-print and web 3. Research ad swap possibilities with related organizations. 	5		Committee & Staff	\$7,000	
Improve Analyst to make it the “first stop” for water treaters	<ol style="list-style-type: none"> 1. Research possibilities for fold-out poster. 2. Promote Analyst subscriptions to nonmembers 	6		Staff & Committee	\$3,500	

ASI #6: Membership – Establishing ‘Member Intimacy’ with AWT Members

VISION (5-7 year timeframe)

- Water treatment companies feel AWT membership is essential to their success.
- Membership of AWT is at least 750 members – at least 600 Full Members and 150 Associate and Consulting Members.
- The AWT is recognized worldwide and has members from throughout the world.
- The AWT has a current and comprehensive profile of potential members.
- The AWT knows its members and has information about each member to support a meaningful membership relationship.
- The AWT attracts the most capable and knowledgeable experts in the industry.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: AWT will know its members and will maintain meaningful relationships with each member.

Objectives (Measures of Success)

- Increased membership to 600 members by 2015.
- Increased member retention rate.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Develop retention strategies	1. Inform membership of benefits 2. Determine ROI for AWT members and in communications 3. Improve member involvement in AWT. 4. Promote Benefits of attending Convention, education, networking, etc.	1		Committee		
Recruit New Members & Explore ways to better identify those in the industry, e.g., the designation of water treatment in the SIC Codes	1. Use existing members as a resource; Letters to vendors to get new members – everyone’s job to bring in new members 2. Utilize CWT insurance promotion.	2	Ongoing	Committee & Staff	\$5,000, not budgeted	
Develop and promote new member benefits	Flash drives for membership as well as other materials	3			\$10,000, not budgeted	
Improve membership involvement	More people involved in committees	4				
AD HOC COMMITTEES						
Dues restructuring	1. Know what the dues increase is going to 2. Get members more involved 3. Define categories for Board approval 4. Educate membership on the purpose of the categories 5. Implement the categories		2011	Committee & Staff		

International members	<ol style="list-style-type: none"> 1. Improve communications 2. International member listserv 3. Links to international membership on the website 4. Get more vendors involved b/c they know international 5. Partner with a UK "AWT" 6. Determine current international member needs. 7. International chapters. 		2011	Committee & Staff		
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ASI #7: Technical Leadership

VISION (5-7 year timeframe)

- The AWT is the recognized leader as the clearinghouse of technical information.
- Industry benchmarks for performance and operation have been set by the AWT.
- Technical publications are recognized by the industry (peer review, high quality).

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: Members will have access to current information, new technologies, and technical assistance.

Objectives (Measures of Success)

- Member ratings (through survey) of the value of the *Analyst*. Verify that members indicate they find the *Analyst* a “must read.”
- Member ratings (determined via survey) of the value of technical communication.
- A technical assistance program (Mentor) developed and instituted by 2010.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Continue to enhance the Analyst & other AWT technical products	<ol style="list-style-type: none"> 1. Produce a minimum of one technical article and one TUTOR in each issue of the Analyst 2. Each year, each Subcommittee will produce an article for the Convention 3. Review chapters 1-4 of the Technical Reference Manual 	1	Ongoing Ongoing Feb 09	Committee	\$12K	
Develop and promote symposiums the Conventions.	Each year, each Subcommittee will produce an article for the Analyst or Convention.	2	Ongoing	Committee	\$0	
Produce a set of operational guidelines for particular applications (cooling towers, boilers) from each Subcommittee.	<ol style="list-style-type: none"> 1. Corrosion rates 2. Boiler guidelines 3. Legionella control 4. Treatment limits 5. Biocide Matrix 6. Pretreatment 7. Wastewater treatment 8. Instrumentation and controls 	3	2010	Committee		
Recreate the AWT website to be an important resource for the water treatment industry.	<ol style="list-style-type: none"> 1. Identify & develop a resource section 2. Refine and publish a comprehensive laboratory services guide for AWT members 3. Create NCD comparison document for website 4. Update the Mentor Series - create online series 5. Develop an audio TR&TM 	4	2010	Committee & Staff		

ASI #8: Board Governance

VISION (5-7 year timeframe)

- The AWT Board is a cohesive unit that jointly determines the organization's mission, vision and values.
- The AWT Board ensures the necessary resources are in place to support the mission.
- Members have confidence in the AWT that they know the pulse of organization and work as one to accomplish set goals.

GOALS, POSSIBLE STRATEGIES, & OBJECTIVES (3-5 year timeframe)

GOAL: The AWT Board will continue to set the future direction of the Association and evaluate themselves in the process.

Objectives (Measures of Success)

- Increased member understanding of the value of AWT.

Strategies	Tactics	Priority	Target Due Date	Responsibility	Cost	Status
Review Governance documents annually.	1. Revise Bylaws in 2009 2. Review & update Policy & Procedures Document	1	2009	Board & Staff		
Continual review of Strategic Plan	Review Strategic Plan at each Board meeting and when determining budgeting and/or program priority shifts.	2	Ongoing	Board & Staff		
Develop Board effectiveness tools	1. Develop self-evaluation tools 2. Hold annual governance session 3. Hold Leadership Orientation for Committee Members 4. Hold Orientation session for New Board Members 5. President, President-Elect & staff to attend CEO symposium yearly 6. Actively recruit new Board members	3	Ongoing	Staff & Board		
Evaluate AMC (Association Management Company) at least every 2 years.		4	2009	Board		