
Strategic Planning Executive Summary: Wisconsin AWRA

July 2023

About this document

This document is the result of a six-month process that involved Wisconsin AWRA members and leadership. It captures the process used, information and ideas gathered, and decisions made, as well as links to the detailed documentation of that process and its results. As needed, it can serve as a reference document for creating work plans and communications to members and others related to strategic planning.

About the process

The board elected to complete strategic planning at this time to respond to the opportunities and challenges offered by the following:

- Rich history of a valuable annual conference that features strong science, strong community, and a focus on professional development at all career stages;
- Calls for social justice, shifts in people's relationship to science, and the growing awareness of the threats of climate change and new pollutants like PFAS; and
- Interest in completing a sustained and thoughtful consideration of leadership, revenue, and service structures in support of remaining relevant and sustainable.

The strategic planning process was designed and facilitated by an external consultant, under the guidance of a strategic planning committee that consisted of the Wisconsin AWRA board and three additional Wisconsin AWRA members. The process involved gathering information and ideas from the strategic planning committee and from members; identifying strengths, weaknesses, opportunities and challenges; and synthesizing that information to define the organization's mission, vision, values, and metrics. It also involved identifying three priority strategies, next steps, and a timeline for addressing those strategic priorities for the coming five years. We expect many of the ideas generated throughout this process to inform the priority strategies and conference planning for the coming five years and beyond.

The strategic planning committee included Aaron Pruitt, Brent Brown, Carol McCartney, Eric Booth, Kirsten James, Brian Mahoney, Matt Deibel, Meg Haserodt, Mike Parsen, Mike Rupiper, Mitch Olds, Paul Dearlove. Alison S. Lebwohl was the external consultant.

Mission

To foster and broaden a diverse, inclusive, and engaged community of professionals to advance and promote sound water resources science and management in Wisconsin.

Vision

A thriving Wisconsin, more resilient to hydrologic extremes, and sustained by clean and available water.

A collaborative, diverse, trusted, and engaged profession that helps develop innovative and equitable solutions to complex water challenges.

Values

As Wisconsin AWRA, we value:

- Innovative, relevant, and actionable science
- Diverse viewpoints and life experiences
- A welcoming and inclusive atmosphere
- Strong community, mentorship and professional development
- Openness and transparency
- Enduring trust between members and the public
- Sharing knowledge and collaborating across different water resources sectors

Priority Strategies

1. **Build organizational capacity** to make leadership more inviting and sustainable for a broader range of people and to allow the organization to do more.
 - a. **Restructure leadership and streamline operations.** Serving on the board is rewarding and the current structure requires a multi-year commitment from a small group of people. This provides continuity, overlap, and efficiency, but also limits capacity, diversity and ability to recruit. To implement this strategy, Wisconsin AWRA will explore reorganizing the board structure -- specifically length of commitment and roles of each position -- while maintaining the context, competence, and connections that make the board attractive and successful. The organization will also explore spreading leadership across more people, such as through a committee structure or paid help, and making organizational refinements to support efficient operation.
 - b. **Assess resource needs and opportunities.** Wisconsin AWRA's annual conference is the organization's primary source of funding. It provides strong science at a very affordable rate. Implementing this strategic plan will likely require more resources. To implement this strategy, Wisconsin AWRA will assess needs and opportunities to resource those needs in ways that do not compromise the accessibility and attendance at its annual conference or its other events.
2. **Broaden backgrounds and experiences** across our organization, leadership, and conference to strengthen the organization, enrich the science, and support an inclusive and equitable profession and community. Wisconsin AWRA has created a tight-knit, collegial community over the years by maintaining connections and by welcoming students and young professionals. But a brief scan of the organization appears to show people from similar backgrounds and organizations -- even though leadership and members know that diversity builds stronger organizations and richer science. Wisconsin AWRA will build upon its current strength in creating a welcoming environment to develop a more diverse and inclusive organization, science, and profession.
 - a. **Grow diversity, equity, and inclusion** with a focus on people from historically underrepresented and marginalized communities. Wisconsin AWRA leadership and members want the organization and the profession to be welcoming and inclusive for all, and want the science to support strong and equitable solutions. To implement this strategy, Wisconsin AWRA will implement actions to be an inclusive and anti-biased organization and will support an inclusive, anti-biased profession and community.
 - b. **Recruit water resource professionals from all sectors.** Academia, federal government, and state government are well-represented at Wisconsin AWRA's conference and leadership and members appreciate the strong science, noncommercial feel, and employer support that has helped build. To implement this strategy, Wisconsin AWRA will work to attract more water resource professionals affiliated with private consulting firms, nonprofits, and municipalities, and who specialize in diverse fields, such as regenerative agriculture, policy, social sciences, and ecological disciplines. The organization will do this while preserving its noncommercial feel and strong focus on water resources.
3. **Focus on improving Wisconsin AWRA offerings.** Wisconsin AWRA's annual conference is the organization's primary event. Members are enthusiastic about the conference and recommended ways that the organization could add events or services beyond it -- in time or in scope. This would invite in new members with different perspectives and strengthen the relationship with current members.
 - a. **Strengthen the annual conference.** Members love the broad, high-quality science, collegial environment, and warm welcome for students that the conference offers -- and want to build upon this foundation to create a more inclusive organization and offer a broader variety of experiences. To implement this strategy, Wisconsin AWRA will strongly consider a variety of member-generated recommendations as it plans its annual conference, including hosting the conference in different locations in the state, offering field trips, workshops or other hands-on activities, and inviting keynotes and speakers from historically underrepresented and marginalized communities.

- b. **Explore events and services beyond the conference.** This process generated many ideas to make Wisconsin AWRA into more of a year-round organization with more frequent and varied “touches” throughout the calendar year. Wisconsin AWRA will explore events or services that could be offered outside the conference in ways that will help advance this strategic plan.

Implementation and timeline

The Wisconsin AWRA board is responsible for implementation of this plan. The board president is responsible for putting strategic planning items on the board agenda in the appropriate months -- and for ensuring that the timing, length of meeting agenda, invitations to additional attendees, and requests/assignments related to advance materials allows for appropriate consideration of related items. Throughout implementation, the board will ensure that recruitment for leadership, presenters, keynotes, attendees, and others is intentional, inclusive, and transparent.

Table 1: Next steps for plan implementation and communication to members

By August 1	<ul style="list-style-type: none"> • Aaron, Mitch and Eric revise the metrics (using comments from the strategic planning committee) for discussion and approval by the board • The board votes on the strategic planning committee’s recommendations • The board identifies the appropriate month to review all conference-related recommendations from members and to incorporate them into conference planning for year one and beyond (priority strategy 3a: Strengthen the annual conference), referencing member feedback summary and detail in appendices
By October 1	<ul style="list-style-type: none"> • The board develops a communications plan to ensure that members understand what was decided, next steps, and how their feedback was used in both strategic planning and conference planning • Priority strategy leads ensure that initial work plans go to board for discussion
By December 31	<ul style="list-style-type: none"> • Priority strategy leads ensure that final work plans go to board for discussion
By 2024 conference (April 2024)	<ul style="list-style-type: none"> • Members receive a full update on what was decided, next steps, and how their feedback was used in both strategic planning and conference planning.

Table 2, below, outlines actions for priority strategies. The focus of the table is on year 1, which kicks off on August 1, 2023. The board will revisit years 2-5 as board members learn more and as they assess progress. Progress will be evaluated at least annually by August 1 (or about 2 months after the annual conference) in years 2 to 4 and will be supported by metrics and additional information as needed. The plan may be adjusted in response to progress, shifts in internal and external factors, and new information. In the event of significant changes in circumstances or information, the board may also adjust the priority strategies. When evaluating implementation and adjustments, the committee agreed that these four questions provide helpful direction.

- Does it move us toward our mission/vision/values in a powerful way?
- Are we positioned to do this better than most organizations?
- Does it strengthen and sustain our organization?
- Can we realistically resource it?

In year 5, the board will complete a more substantial evaluation of overall progress on priority initiatives, and of other internal or external factors that may indicate a need for a large or small update. Board members will consider whether another strategic planning retreat is needed, gather information, make decisions, and update the strategic plan accordingly.

Table 2: Timeline for priority strategies

	Leadership structure and resource assessment	Diversity, equity & inclusion	All sectors of the profession
Leads	<i>Meg & Paul</i>	<i>Brent & Kirsten</i>	<i>Brian</i>
Initial team members	<i>Matt</i>	<i>Mitch, Mike R.</i>	<i>Carol</i>
Year one	<p>Revise board structure and roles</p> <p>Evaluate and decide: adding a student rep to the board</p> <p>Revise committees and committee roles. Recruit initial members from board and membership. Communicate process to members. Encourage people to self-nominate.</p> <p>Assess resource needs and opportunities.</p> <p>Identify bylaw changes needed</p>	<p>In coordination with conference planning, work to offer a keynote or presenter on a topic related to DEI.</p> <p>In coordination with conference planning, select specific changes or additions to outreach and event execution to make the conference more welcoming and inclusive for historically underrepresented and marginalized communities.</p> <p>Create a working group to begin gathering good practices from literature and other organizations.</p> <p>Explore other partnership or resourcing opportunities.</p>	<p>In coordination with conference planning, consider offering a presenter or breakout session related to water resource science and agriculture or social sciences.</p> <p>Identify list of target organizations.</p> <p>Engage existing members who have relevant experience or organizational affiliations to advise and support this work.</p> <p>In coordination with conference planning, identify specific changes or additions to outreach and event execution to make the conference more welcoming and inclusive and attractive for consultants and nonprofits.</p>
Year two	<p>Collect data for metrics.</p> <p>Begin drafting specific bylaw changes.</p>	<p>Collect data for metrics.</p> <p>Fold this work into a formal committee when ready.</p> <p>Select and begin implementing good practices. These may include year-round outreach, targeted partnerships, or</p>	<p>Collect data for metrics.</p> <p>Fold this work into a formal committee when ready.</p> <p>Develop intentional, inclusive, and transparent recruitment goals for membership, the board, and committees.</p>

Table 2: Timeline for priority strategies

	Leadership structure and resource assessment	Diversity, equity & inclusion	All sectors of the profession
		<p>creation of mentorship programs.</p> <p>Develop intentional, inclusive and transparent recruitment goals for membership, the board and committees.</p>	
Years two, three and four (note overlap with row above)	<p>Set target goals for metrics.</p> <p>Evaluate and decide: outsourcing conference planning</p> <p>Evaluate and decide: paid position for organization support</p> <p>Consider adding services or activities outside the conference as they support these and other strategies and can be resourced.</p> <p>(priority strategy 3b: Explore events and services beyond the conference)</p>	<p>Set target goals for metrics.</p> <p>In coordination with conference planning, complete intentional planning of topics, as well as planning and recruitment of speakers, moderators, poster presenters, and keynotes.</p> <p>Consider adding services or activities outside the conference as they support these and other strategies and can be resourced.</p>	<p>Set target goals for metrics.</p> <p>In coordination with conference planning, use conference themes and services to broaden interest and membership.</p> <p>Consider adding services or activities outside the conference as they support these and other strategies and can be resourced.</p>
Year five	<p>Continue with execution</p> <p>Evaluate and reflect upon progress, internal changes, and external changes.</p> <p>Consider another strategic planning retreat.</p>		