August 3, 2022

Dear WateReuse Member:

We want to thank you and your organization for your continued support of the WateReuse Association and for all the important work you do. There has never been a point in time during the Association’s 32-year history, when water recycling has been more relevant in the U.S. or across the globe. Climate change is dramatically impacting our water supplies, water quality, and the sustainability of the communities we live in. The evidence of these challenges surrounds us every day as we see our rivers, reservoirs and groundwater supplies dwindle to historically low levels, and observe nutrient degradation of our fresh and saltwater environments in every region of the U.S. To address these challenges, we have developed regionally tailored solutions where recycled water quality is matched to the specific needs of the appropriate end use. Potable reuse, once a futuristic thought, is now a reality with many existing projects in operation and many more on the way.

Together, we have accomplished a great many things in recent years to advance water recycling in the U.S., working together at both the state and national levels of government. And we have done so even in the face of considerable adversity created by the Covid pandemic and other operational challenges. Some of our most notable accomplishments include:

- Securing over $1 billion in federal funding and establishing the first national water recycling grant program,
- Leading on the National Water Reuse Action Plan and establishing a federal water reuse interagency working group,
- Hosting successful virtual Symposia,
- Developing new communication and policy resources, and
- Establishing new WateReuse sections in South Carolina, the Mid-Atlantic region, and New Mexico.

These accomplishments could not have been possible without your support and engagement, and we hope you are as proud of these accomplishments as we are.

**New Strategic Plan**

Your Board of Directors has been working for over a year on a new five-year Strategic Plan. In preparation for the strategic planning process, we invested in a *Market Analysis* covering the entire U.S., to understand where the market for water recycling is heading over the next decade, and an *Operational Assessment* to understand how best to resource the organization to capitalize on this growth.

The Market Analysis, conducted by Bluefield Research, confirmed that there are multiple environmental, economic, demographic, and resiliency-related drivers leading both municipalities and businesses toward adopting water recycling practices across every region in the U.S., and that these drivers are expected to accelerate as climate change becomes more pronounced. The
Operational Assessment, conducted by Association Headquarters, confirmed that our members overwhelmingly receive great value from their participation in the Association and recommended specific investments to strengthen our operations. These recommendations included such things as right-sizing staff, providing tailored support to our sections and more engagement opportunities to our membership at-large, improving our technology tools, and diversifying our revenue base. The draft strategic, business, and financial plans are designed to begin implementing these recommendations and capture emerging market opportunities.

These two independent efforts helped frame the strategic planning discussions and led to the development of revised Vision and Mission statements as well as strategic goals and objectives to maintain our leadership as the premier authority on water reuse, ensure continued value for our members, and support the adoption of water recycling across multiple regions and sectors.

Our FY23 budget seeks to ensure we continue to invest in our core member programming and ensure success under our revised Strategic Plan. As it developed our FY23 budget and financial plan, the Board looked at several options that ranged from bare bones to aggressive growth. The Board settled on a moderate growth strategy where we focus on regaining some loss ground and laying a foundation to implement critical operational recommendations. This strategy will allow us to reinforce our organizational leadership in water recycling, optimize programming, and provide strong member engagement opportunities.

Our business plan assumes moderate growth in conferences, sponsorships and other non-dues revenue, memberships, and an increase in the member dues rate. The 2023 dues would increase by an average of $720 per member organization. Our smallest members would see little or no increase. While we anticipate staff will continue remote operations next year, we expect to return to in-person office operations the following year. Our draft financial plan also prioritizes gaps in staff resources while providing a foundation for continued long-term investment in operations and programming.

**August Member Briefings**

If you have questions or feedback on the strategic plan, business plan or budget, please join one of our upcoming briefings via Zoom:

- **Thursday, August 4, 3:00 – 4:30 pm (EST)**
  [https://us02web.zoom.us/j/81031672521?pwd=cZWUHAwdGsrZ2JSdTFRd2tkNGJqZz09](https://us02web.zoom.us/j/81031672521?pwd=cZWUHAwdGsrZ2JSdTFRd2tkNGJqZz09)
- **Friday, August 5, 2:00 – 3:30 pm (EST)**
  [https://us02web.zoom.us/j/85797800971?pwd=UTZ1S2pFcDBOL1hLWFVxV3MrWFhFdz09](https://us02web.zoom.us/j/85797800971?pwd=UTZ1S2pFcDBOL1hLWFVxV3MrWFhFdz09)
- **Friday, August 18, 11:00 am – 12:30 pm (EST)**
  [https://us02web.zoom.us/j/84222897463?pwd=N1dEZkdURStKFNJyL1NTbkcxMVIYdz09](https://us02web.zoom.us/j/84222897463?pwd=N1dEZkdURStKFNJyL1NTbkcxMVIYdz09)

You can also email your comments to zdorsey@watereuse.org through Wednesday, August 24, 2022. The staff will incorporate member feedback so that the Board can give preliminary approval of the plan at the September 9 Board of Directors meeting. The Board will give its final approval of the plan at its December 2022 meeting.

Thank you for your time in reviewing this critical information and most of all, thank you for your continued membership and support.

**Craig W. Lichty, P.E.,**
President

**Patricia L. Sinicropi, JD**
Executive Director
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Introduction

About the WateReuse Association

The WateReuse Association (WateReuse) was established in 1990 to advance water recycling through advocacy and education. Since 2000, WateReuse has operated as a national trade association with utility, business, and institution members across the United States and in several other countries. Our five-year strategy is focused on advancing water recycling in the United States, while leveraging domestic and international partnerships to facilitate knowledge sharing.

The WateReuse Board of Directors sets organizational, financial, and legal policies to govern the organization and professional staff works with our membership volunteers to achieve our mission of empowering communities and business to embrace water recycling. Members in specific regions can establish state or regional WateReuse Association Sections to focus on unique local or state regulatory, policy, education, and communications needs. Sections are established through a Charter Agreement, approval by the Association’s Board of Directors, and ratification by members in the respective state or region.

About the Business Plan

In collaboration with our membership and sections, the WateReuse Board of Directors developed a five-year Strategic Plan (2023-2027) identifying goals and objectives for the Association to accomplish to support its mission and vision. The goals and objectives are divided into three categories: Advocacy, Programs and Communications, and Membership, Sections, & Operations. The Business Plan identifies specific tactics needed to accomplish our strategic goals and objectives, establishes implementation metrics for outcomes that can be achieved over a three-year period (2023-2025) given available resources, and provides an outlook for work that will be done in 2026-2027.

Operational Assessment and Market Analysis

The development of the strategic and business plans was informed by an Operational Assessment conducted by Association Headquarters and a Market Analysis conducted by Bluefield Research. These two commissioned reports helped the Board and staff identify key tactics to improve operational efficiency and grow membership.

Operational Assessment Key Findings and Recommendations

- A net promoter score of +54, well above the average of +32, indicates strong member satisfaction. Top rated benefits include advocacy, webcasts, newsletters, Symposium, section events).
- Current staff face bandwidth challenges. New staffing recommended for:
  - Program/content development
Optimize programs to generate revenue:
- Potential revenue sources include advertising, year-round sponsorships, events, micro-credentialing program
- WateReuse sponsorships are at 14% of income versus industry benchmark of 25%. WateReuse currently offers only Symposium-related sponsorships.

Technology assessment, improvement plan, and implementation needed.

Bluefield Market Analysis Key Findings
- Growth in municipal water reuse is occurring in key regions: Arid West, Texas, Florida & Southeast, Eastern Seaboard.
- Growth in industrial reuse is occurring nationally in key sectors: food & beverage, energy, clean tech, advanced manufacturing.

Business Plan Highlights
For each Goal Area, the Business Plan details our five-year strategy and then identifies the essential outcomes that can be accomplished in the first three years as Implementation Metrics. The plan projects slow growth - begins to address deficiencies identified by the Operational Assessment, addresses our key strategic goals, positions us to adapt to the economic landscape, and enables staff to return to a physical office space.

Our plan for 2023-2025:
- Begins to address staff capacity challenges
- Reinforces WateReuse leadership in reuse, optimizes programming, and provides member engagement opportunities
- Addresses section support challenges and bolsters member prospecting in growth regions
- Begins to address website and database challenges
- Begins development of an industrial member base
- Begins to diversify revenue streams
- Begins to address legacy-related resource challenges
- Stabilizes staff
Vision, Mission, and Guiding Principles

Vision
A nation in which every community uses water recycling to safeguard public health and achieve environmental and economic resilience.

Mission
To empower communities and businesses to embrace water recycling as the cornerstone to safe, resilient, and sustainable water resources.

Guiding Principles
- **Stewardship**: We believe the responsible use and recovery of water sources is vital to water sustainability and environmental resilience.
- **Leadership**: We believe leaders, working together from diverse communities to create a culture of inclusion and equity, will effectively increase the adoption of water recycling.
- **Partnership**: We believe strategic alliances with other organizations will strengthen our efforts to increase water recycling.
- **Innovation**: We believe innovation will accelerate the public’s embrace and adoption of water recycling, resulting in its rapid implementation.
- **Education**: We believe education is essential to building trust and passion for water recycling.
- **Service**: We believe in providing value, integrity, transparency, and accountability to our members and supporters.
Goal Area 1: Advocacy

Goal 1-1: Advance policies and funding at local, state, and federal levels to promote the expansion of water recycling across all sectors.

Objective 1-1-1: Identify and increase bipartisan champions for recycled water across all government levels

Secure at least two recycled water champions on each jurisdictional committee, at least two in each state that has a WateReuse Section, and at least five champions that do not serve on jurisdictional committees.

The tactics for increasing bipartisan champions for recycled water include:

- Recruit and meet with congressional targets routinely, facilitate welcome letters to new members of Congress from WateReuse members and Sections, and facilitate a quarterly virtual meeting between WateReuse members and each congressional target.
- Outreach and Communications: Work with Sections and key WateReuse members to place local media pieces in-state/in-district and send media clips to target offices.
- Provide advocacy tools and technical assistance for Sections as needed to support this work.

Rationale: Increases likelihood of legislative success; increases value proposition of Association which will lead to greater ability to retain and recruit members

Objective 1-1-2: Increase incentives to support the adoption of water recycling across all sectors, including municipal and commercial sectors.

Build strategic partnerships with stakeholder organizations to both leverage and finance an industrial tax credit campaign and to develop tools and resources to help localities and states identify and model incentives.

Our tactics for increasing incentives for water recycling include:

- Build relationships with potential industrial users.
- Build relationships with members of the House Ways and Means Committee and Senate Finance Committee.
- Recruit industrial users as members to support the industrial tax credit campaign as part of the new “Coalition for Water Recycling” program.
- Develop briefing materials and host a congressional briefing on an industrial tax credit to build support and grow champions in Congress.
- Continue ongoing lobbying on Title VXI, Desalination, and AWS grants programs.
- Develop a model for state and local incentives.
• Compile library of state and local incentives.

*Rationale:* In addition to advocacy on core issues in support of the public water utility sector, establishing a federal tax credit and other incentives for private industry builds-out an advocacy program designed for industrial users which would help grow and diversify Association membership and revenue base.

**Objective 1-1-3: Create a supportive regulatory landscape for water recycling at all government levels.**

Building and maintaining strong relationships with executive branch officials to influence policy-making by federal and state agencies, with engagement by WateReuse members and partners.

Our tactics for this objective include:

- Develop a guide on how to jumpstart a water reuse regulatory process with model rule considerations for use by members/WateReuse Sections.
- Ensure the Federal Interagency Water Reuse Working Group functions well and has robust engagement by all federal participants.
- Association engagement on all relevant rulemakings, guidance development, and other administrative decision making.

*Rationale:* Provides a specific member and section resource for states that have antiquated or no regulations on the books; continues to strengthen Association’s leadership in federal and state regulatory policy; and ultimately creates a positive feedback loop for overall advocacy and member retention programming.

**Objective 1-1-4: Enact legislation to increase funding, incentives, and support for water recycling at all government levels.**

Build congressional champions for water recycling and maintain strong relationships with existing champions, grow support across the water sector for water recycling policies, compile and communicate compelling information, take advantage of legislative “windows of opportunity” (relevant legislative vehicles) and ensure robust participation from WateReuse members and partners.

Our tactics for this objective include:

- Meet routinely with congressional champions and committee staff.
- Develop marker bills and build cosponsor lists.
- Provide witnesses and questions for congressional hearings.
- Run a full-scale appropriations advocacy campaign each year.

*Rationale:* Ensures consistent annual federal funding for core support programs and identifies new opportunities to expand funding which ensures members value and retention.
### 2023 – 2025 Implementation Metrics: Advocacy

<table>
<thead>
<tr>
<th>FY 2023</th>
<th>FY 2024</th>
<th>FY 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultivate government champions (at least 2 members of Congress from each committee)</td>
<td>Recruit five members for the Coalition for Water Recycling</td>
<td>Recruit 10 new members for the Coalition for Water Recycling</td>
</tr>
<tr>
<td>Secure continued funding of T16, AWS, desal &amp; other legislative priorities</td>
<td>Hire contract lobbyist to pursue alternative tax credits</td>
<td>Hire contract lobbyist to pursue alternative tax credits</td>
</tr>
<tr>
<td>Secure continued funding of T16, AWS, desal &amp; other legislative priorities</td>
<td>Hire new staff: Industrial &amp; Corporate Affairs Director, FTE supporting Coalition for Water Recycling &amp; year-round sponsorship program</td>
<td></td>
</tr>
<tr>
<td>Cultivate government champions (at least 2 members of Congress from each committee)</td>
<td>Secure continued funding of T16, AWS, desal &amp; other legislative priorities</td>
<td>Cultivate government champions (at least 2 members of Congress from each committee)</td>
</tr>
</tbody>
</table>

### Outlook for 2026 – 2027 Deliverables

- Advance Industrial Tax Credit
- Hire 1 FTE Policy Fellow/Intern
- Produce library of state and local incentives; develop models for new incentives
- Develop guidance on how to jumpstart a state water reuse regulatory process
Goal Area 2: Programs and Communications

Goal 2-1: Strengthen our position as the premier authority on water reuse.

Objective 2-1-1: Optimize and expand programs to fully reflect the diversity of recycled water market sectors, drivers, solutions, and approaches.

Continue to build programming that represents the range of water recycling use applications, develop and organize content on member-facing and public-facing platforms to demonstrate the breadth of Association resources.

Our tactics for this objective include:

- Build and align content (webcasts, events, policy briefs, etc.) across standard topical domains to reflect all use applications, drivers and regional diversity; and to enable website informational searches more efficiently.
- Optimize work of standing committees and fully integrate section participation.
- Establish standing committees for potable reuse and communications to support programming (see Objective 3-1-3).
- Annually assess member satisfaction and utilization rates for program offerings via member survey.

Rationale: Strengthens WRA leadership across use applications by improving content and quality of webcasts, Symposia & publications which in turn increases member engagement experience, satisfaction and retention, creating a positive feedback loop for advocacy efforts and helps ensure we do not lose ground to competitor organizations.

Objective 2-1-2: Grow attendance and diversify engagement channels for WateReuse Symposia, conferences, workshops, and events.

Increase marketing effectiveness, build specific content for target audiences, and offer audiences a unique education experience when and where it is needed.

Our tactics for this objective include:

- Market conferences to wider audiences through partnerships and list-building.
- Refresh Annual WateReuse Symposium to facilitate growth in a post-pandemic world (increase networking and small group engagement opportunities, present diverse content in diverse formats, etc.)
- Develop workshops/curricula that can be presented in-person or virtually separate in conjunction with or apart from the Symposium (e.g., Communications 101, Water Reuse 101).
- Convene a specialty conference on industrial reuse in 2024.
**Rationale:** Strengthens WRA leadership as premiere authority, helps diversity revenue and expand membership pool; creates additional member engagement opportunities leading to increased retention and recruitment opportunities, and increased effectiveness in our advocacy.

**Objective 2-1-3: Increase strategic partnerships to reach new audiences and strengthen our leadership.**

Establish ourselves as the go-to Association among stakeholder organizations for engagement and information on issues related to water recycling.

Our tactics for this objective include:

- Establish relationships with organizations related to each of our topical domains (e.g., specific industries and agriculture) to support content development and knowledge sharing for members.
- Establish relationships with organizations that represent elected leaders, policy makers, local governments, such as NACO, Mayors, NLC, ICMA.
- Enhance and reaffirm partnerships with national water sector organizations through refreshing existing MOU’s and regular coordinating meetings.
- Leverage member relationships to engage with new domestic and international partners.
- FTE Program and Outreach coordinator.

**Rationale:** Bolsters leadership of WRA as "go to" organization; expands potential membership and event participants pool and builds awareness of membership benefits, ultimately leading to more effective advocacy and programming.

**Goal 2-2: Strengthen our position as the leading communications platform that creates trust and passion in our communities for water reuse.**

**Objective 2-2-1: Increase support for water reuse among key stakeholders and the public.**

Provide more support to local utilities to effectively communicate to ratepayers and local officials about water reuse projects, push out key messages about the benefits of water recycling to the public, business leaders and policymakers, and leverage partnerships to monitor and track water recycling sentiment.

Our tactics for this object include:

- Continue regular publication of WateReuse Review and existing state section newsletters. Seek to support additional state section newsletters, pending resources.
- Develop “Profiles in Reuse” flyers and talking points to support each topical and use application domain.
- Develop a Water Recycling Communications Toolkit, which includes new communications tools and resources and regular updates of existing resources.
- Develop a public sentiment survey and leverage partnerships with local leadership associations (such as NACO, Mayors, NLC, ICMA, Chamber) to distribute it and track progress.
• Increase media engagement and establish a comprehensive media tracking/monitoring system; assess technology options in Technology Improvement Plan (see Objective 3-3-2).
• 1 FTE Communications Coordinator in 2025 to bolster and optimize communications resources (See Objective 3-3-2).

**Rationale:** Strengthen WRA’s communications tools and resources for members to use in their communication efforts; increases public understanding and awareness; and, ultimately provides a positive feedback loop for our advocacy and retention efforts.

**Objective 2-2-2: Strengthen our communications channels and tools.**

Strengthen messaging and ensure that key information is both easy-to-find and accessible in multiple ways.

Our tactics for this objective include:

• Develop an internal style guide to align messaging and branding across the organization, including WateReuse Sections.
• Increase use of social media, blog posts, and trade media to bolster awareness of water recycling.
• Improve website to allow visitors to view, search, and filter resources according to use applications and topical domains.
• Leverage leadership on Water Reuse Action Plan (Action 8.1: *Compile and Develop Outreach and Communication Materials*) to establish a public-facing and media portal to access educational resources.
• Assess website as part of Technology Improvement Plan and overhaul if necessary to improve functionality (see Objective 3-3-2).

**Rationale:** Increases awareness of water recycling in the "public square" and solidifies WRA as the "go to" on water reuse.
## 2023 – 2025 Implementation Metrics: Programs and Communications

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<tr>
<th>FY 2023</th>
<th>FY 2024</th>
<th>FY 2025</th>
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<tbody>
<tr>
<td>Add Section representative &amp; early career professional to each standing committee</td>
<td>10% increase in attendance at Annual WateReuse Symposium</td>
<td>10% increase in attendance at Annual WateReuse Symposium</td>
</tr>
<tr>
<td>Establish new standing committees: potable reuse and communications</td>
<td>Host successful Industrial Reuse conference</td>
<td>Four new Profiles in Reuse fact sheets</td>
</tr>
<tr>
<td>10% increase in attendance at Annual WateReuse Symposium</td>
<td>Four new Profiles in Reuse fact sheets</td>
<td>Produce Recycled Water Communications Toolkit</td>
</tr>
<tr>
<td>Four new Profiles in Reuse fact sheets</td>
<td>Establish a public-facing web portal for educational resources (WRAP 8.1: Compile and Develop Outreach and Communication Materials)</td>
<td>Two new strategic partnerships</td>
</tr>
<tr>
<td></td>
<td>One new strategic partnership</td>
<td></td>
</tr>
</tbody>
</table>

### Outlook for 2026 – 2027: Programs and Communications Deliverables

- Update existing communications tools and resources
- Develop a public sentiment survey and leverage partnerships with local leadership associations to distribute it and track progress.
- Work with Sections and key WateReuse members to place local media pieces in-state/in-district to support advocacy goals.
- Host revenue generating specialty conferences & events, both nationally and in partnership with WateReuse Sections.
- Hire 1 FTE Events Coordinator (to work with Events Director)
- Hire 1 FTE Marketing & Communications Coordinator
- Hire 1 FTE Program & Outreach Coordinator
Goal Area 3: Membership, Sections, and Operations

Goal 3-1: Grow and support our membership so the Association can effectively accomplish its mission.

Objective 3-1-1: Strengthen our value proposition to retain and attract more members.

Increase the number of resources available exclusively to members, improve customer support and member awareness of resources, and use member feedback to improve member services on an ongoing basis.

The tactics for this objective include:

- Refresh the WateReuse website to increase the number of tools and resources that require member login for full access.
- Establish a library of member outreach materials for national staff and WateReuse Sections.
- Develop standard operating procedures for onboarding, engaging, and renewing members.
- Conduct an annual member survey to assess member satisfaction and inform our workplan.
- Regularly host virtual meetings with current and prospective members. Continue Annual Report/Year-to-Date report.

Rationale: Strengthens member retention and recruitment efforts, establishes early warning system for members at risk for non-renewal.

Objective 3-1-2: Strategically expand membership to reflect the diversity of water reuse market sectors, drivers, solutions, and approaches.

Grow membership in high growth potential states/regions among our core membership sector of municipal water utilities and related entities; and diversify membership by developing programming and value proposition attractive to commercial and industrial sectors.

The tactics for this objective include:

- Establish a Membership Committee and develop a member recruitment and retention strategy, including annual membership retention and recruitment targets.
- Pursue contacts identified in the Bluefield Market Analysis for membership.
- Focus membership recruitment efforts in high-growth potential regions/states such as Texas, Florida, and the Eastern seaboard as identified in Bluefield Market Analysis.

Goal Area 3: Membership, Sections, and Operations
• Develop programs attractive to industrial and commercial sectors and refresh/relaunch the Recycled Water User Network to support the program.

**Rationale:** Increases member revenue, expands and diversifies membership, and drives public acceptance creating a positive feedback loop for our advocacy and programming.

**Objective 3-1-3: Increase engagement opportunities for members at all career levels.**

Annually assess and improve engagement opportunities that are responsive to members interest, and use technology to monitor and encourage participation.

The tactics for this objective include:

• Leverage feedback from annual member survey and member meetings (Objective 3-1-1) to ensure engagement opportunities offered meet member needs.
• Invite and integrate multiple individuals from member organizations into Association committees, events, and activities.
• Strengthen committee engagement by encouraging participation across WateReuse Sections and non-section members, and by establishing annual workplans incorporating both advocacy and educational goals.
• Establish new standing committees: Education & Outreach Committee, Potable Reuse Committee, and Young Professionals Committee.
• Assess opportunities to increase member engagement through digital and online platforms (Technology Improvement Plan).

**Rationale:** Strengthens member experience and value proposition, develops pipeline within member organizations of WRA champions, and contributes to member retention efforts.

**Goal 3-2: Strengthen and strategically expand WateReuse Sections to support the overall strategic mission, goals, and objectives of the organization.**

**Objective 3-2-1: Increase tools and resources to support Section advocacy, communications, programming, member engagement, and operations based on the needs of each Section.**

Increasing Section knowledge and capability around advocacy and communications, ensure Section representation on national initiatives, provide operational assistance where necessary, support onboarding of Section Board of Trustees, and tailor support to the needs of individual Sections.

Our tactics for this objective include:

• Advocacy Support
  o Develop a guide to advocating for state-level policies (see Objective 1-1-2).
  o Develop a library of state and local funding incentives (see Objective 1-1-2).
  o Provide training on best practices for outreach to state and federal policymakers.
• Communications and Marketing Support
  o Develop a WateReuse communications guide (e.g., editorial, branding, and social media best practices) (see Objective 2-2-2).
  o Promote section activities through WateReuse Association communications channels and continue support for existing section newsletters.
  o Develop a menu of tools, templates, and services for communication support.
  o Develop “Profiles in Reuse” flyers for each Section.

• Conference, Events, Webcasts, and Programs
  o Provide conference support to WateReuse California (including help with monitoring budget, expenses, and marketing).
  o Collaborate with Sections to develop an event strategy and resource plan to attract and retain members.
  o Ensure Section representation on all national committees.

• Membership Recruitment and Retention Support
  o Develop and document standard procedures for onboarding, engagement, and renewing members in coordination with Sections (see Objective 3-1-1).
  o Develop a library of member outreach materials for WateReuse Sections (see Objective 3-1-1).
  o Improve accessibility and effectiveness of member database for use by Sections in their member outreach strategy (Technology Improvement Plan, see Objective 3-3-2).
  o Evaluate and improve value proposition for secondary Section memberships.

• Operations Support
  o Provide monthly or quarterly financial reports.
  o Provide budget development support where possible.
  o Coordinate quarterly and annual meetings to facilitate information sharing among sections.
  o Provide an annual orientation for new Section leaders and Boards of Trustees.

• New Section formation
  o Develop guidebook for new WateReuse Section formation.

Rationale: Strengthens WRA Sections’ capabilities to achieve their advocacy and program goals; increases operational efficiency and member engagement opportunities; contributes to overall organizational effectiveness and helps align national and section efforts.

Goal 3-3: Implement a multi-year operations, staffing, and financial strategy to achieve our strategic goals and objectives.

Objective 3-3-1: Diversify and grow revenue through membership development, Symposia and conferences, new revenue generating programs, and the optimization of existing programs.

Diversify and grow revenue is to optimize membership and conference revenue in the short term, while laying the foundation for new revenue generating programs for the future.

Our tactics for this objective include:
- Develop and implement a Technology Improvement Plan.
- Improve database management and website efficiency. (FTE Database and Website Manager to support member database and website in response to the Technology Plan).
- Diversify alternative revenue streams through building a comprehensive sponsorship program.
- Assess the potential of alternative revenue sources apart from sponsorship program including grant funding, micro-credentialing programs, etc.
- Digitalize accounting system, i.e. shift to Bill.com.
- Streamline accounts payable and receivable system.
- Streamline renewal process.

**Rationale:** Improve operational efficiencies, diversify revenue base, build capacity for stronger programming and member engagement.

**Objective 3-3-2: Invest in adequate staff resources to achieve goals and objectives.**

Invest in staff resources to facilitate the implementation and expansion of revenue generating programs, and to increase value to members. As WateReuse Association grows, these staffing resources will align us with standard association organizational structure and best-practices.

The tactics to support this objective include:

- Rehire Events Director (2023) and add a new Events Coordinator.
- Provide support to Sections and support member recruitment and retention (FTE Section & Member Liaison).
- Diversify current alternative revenue streams through building a year-round sponsorship program. (FTE Marketing and Sponsorships Manager).
- Bolster and optimize advocacy resources and expand policy research capabilities. (FTE Policy Fellow/Intern position).
- Bolster and optimize communications resources and expand communications to WateReuse Sections. (FTE Communications Coordinator).
- Expand capacity to grow programs and build and manage partner relationships. (FTE Program and Outreach Coordinator).

**Rationale:** Ensure staff remains stable, ensure sufficient capacity to meet membership obligations, strengthen overall Association as leader in water recycling.

**Objective 3-3-3: Ensure organizational alignment with WateReuse Sections on policy, programs, and operations.**

Ensure access to governance documents, training, and information exchange to facilitate organizational cohesiveness.

The tactics to support this objective include:

- Annual orientation session with new section leadership
- Sections meet regularly for information exchange
- Formal feedback loop between sections and staff
Rationale: Bolsters WRA as a national association sufficiently resourced and aligned with the work of its sections.

2023 – 2025 Implementation Metrics: Membership, Sections, & Operations

<table>
<thead>
<tr>
<th>FY 2023</th>
<th>FY 2024</th>
<th>FY 2025</th>
</tr>
</thead>
<tbody>
<tr>
<td>Establish Membership Committee</td>
<td>Increase membership</td>
<td>Increase membership</td>
</tr>
<tr>
<td>Hire new staff: Section &amp; Member Liaison FTE</td>
<td>Increase Annual WateReuse Symposium sponsorship</td>
<td>Increase Annual WateReuse Symposium sponsorship</td>
</tr>
<tr>
<td>Increase membership</td>
<td>Increase member net promoter score (member satisfaction) by 5%</td>
<td>Increase member net promoter score (member satisfaction) by 5%</td>
</tr>
<tr>
<td>Increase sponsorship revenue and expand opportunities</td>
<td>Increase number of employees engaged from each member organization by 5% on average</td>
<td>Increase number of employees engaged from each member organization by 5% on average</td>
</tr>
<tr>
<td>Increase member net promoter score (member satisfaction) by 5%</td>
<td>Return to in-person office in Washington, D.C.</td>
<td>Hire new staff: Industrial &amp; Corporate Affairs Director (FTE)</td>
</tr>
<tr>
<td>Develop tailored support plans for each State Section</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire database consultant to improve operational efficiency</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Outlook for 2026 – 2027: Membership, Sections, & Operations Deliverables

- Develop and implement a technology improvement plan
- Assess the potential of alternative revenue sources apart from sponsorship program including grant funding, micro-credentialing programs, etc.
- Expand Section event support.
- Expand Staff (Events Coordinator, Policy Fellow/Intern position, Marketing & Communications Coordinator, Program and Outreach Coordinator).
### WATERUSE ASSOCIATION

#### 2023 Proposed Budget

<table>
<thead>
<tr>
<th>Revenue</th>
<th>2019 Actual</th>
<th>2020 Actual</th>
<th>2021 Actual</th>
<th>2022 Approved WRA Budget</th>
<th>2022 Forecast</th>
<th>2023 Proposed WRA Budget</th>
<th>2024 Proposed WRA Budget</th>
<th>2025 Proposed WRA Budget</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dues-National</td>
<td>$1,024,506</td>
<td>$1,278,208</td>
<td>$1,220,472</td>
<td>$1,338,810</td>
<td>$1,361,656</td>
<td>$1,604,297</td>
<td>$1,844,686</td>
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<tr>
<td>Dues-Sections</td>
<td>$448,942</td>
<td>$531,921</td>
<td>$553,271</td>
<td>$597,288</td>
<td>$657,680</td>
<td>$793,570</td>
<td>$919,024</td>
<td>$1,043,957</td>
</tr>
<tr>
<td>Conferences &amp; Events</td>
<td>$893,312</td>
<td>$445,996</td>
<td>$267,529</td>
<td>$549,325</td>
<td>$724,235</td>
<td>$896,965</td>
<td>$1,233,151</td>
<td>$1,229,295</td>
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<tr>
<td>Products &amp; Services &amp; Coalitions</td>
<td>$18,267</td>
<td>$11,736</td>
<td>$6,333</td>
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<td>$5,150</td>
<td>$5,450</td>
<td>$10,545</td>
<td>$255,405</td>
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<td>Special Projects/TAF</td>
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<td>$5,000</td>
<td>$10,000</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
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<tr>
<td>Conferences Reimb/Other Reimb</td>
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<td>$32,656</td>
<td>$195,409</td>
<td>$25,000</td>
<td>$2,000</td>
<td>$35,000</td>
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<td>Investment Income</td>
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<td>$18,000</td>
<td>$18,000</td>
<td>$20,000</td>
<td>$20,700</td>
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<td>Use of Prior Year Net Assets</td>
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<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
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<tr>
<td><strong>Subtotal</strong></td>
<td>$2,513,407</td>
<td>$2,336,677</td>
<td>$2,265,909</td>
<td>$2,248,423</td>
<td>$2,755,721</td>
<td>$3,353,267</td>
<td>$4,174,535</td>
<td>$4,768,009</td>
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</table>

<table>
<thead>
<tr>
<th></th>
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</tr>
</thead>
<tbody>
<tr>
<td>State Section Dues</td>
<td>$448,942</td>
<td>$531,921</td>
<td>$553,271</td>
<td>$597,288</td>
<td>$657,680</td>
<td>$793,570</td>
<td>$919,024</td>
<td>$1,043,957</td>
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<tr>
<td>Section Programs</td>
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<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
<td>$ -</td>
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<tr>
<td>Overhead</td>
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<td>$85,693</td>
<td>$23,118</td>
<td>$39,800</td>
<td>$41,600</td>
<td>$23,256</td>
<td>$152,456</td>
<td>$156,452</td>
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<td>Administration</td>
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<td>$48,417</td>
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<td>$84,524</td>
<td>$83,518</td>
<td>$95,935</td>
<td>$105,098</td>
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<td>Infrastructure/Technology</td>
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<td>$17,640</td>
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<td>$20,000</td>
<td>$26,500</td>
<td>$24,840</td>
<td>$30,349</td>
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<td>Staff Compensation</td>
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<td>$1,232,291</td>
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<td>$1,399,368</td>
<td>$1,725,366</td>
<td>$1,825,283</td>
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<tr>
<td>Contract Services</td>
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<td>$136,137</td>
<td>$353,136</td>
<td>$43,100</td>
<td>$142,825</td>
<td>$104,725</td>
<td>$168,300</td>
<td>$232,184</td>
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<tr>
<td>Conferences &amp; Events</td>
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<td>$190,178</td>
<td>$94,405</td>
<td>$543,500</td>
<td>$525,979</td>
<td>$728,002</td>
<td>$793,302</td>
<td>$669,132</td>
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<tr>
<td>Marketing &amp; Communications</td>
<td>$47,202</td>
<td>$46,455</td>
<td>$25,708</td>
<td>$108,188</td>
<td>$34,000</td>
<td>$101,976</td>
<td>$105,544</td>
<td>$109,238</td>
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<td>Travel</td>
<td>$39,180</td>
<td>$6,643</td>
<td>$15,093</td>
<td>$15,000</td>
<td>$25,000</td>
<td>$25,000</td>
<td>$35,875</td>
<td>$47,131</td>
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<tr>
<td><strong>Subtotal</strong></td>
<td>$2,333,551</td>
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<td>$2,363,077</td>
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<td>$2,930,976</td>
<td>$3,611,910</td>
<td>$4,102,649</td>
<td>$4,438,575</td>
</tr>
<tr>
<td>(Gain)/Loss on Investments/TAF</td>
<td>$188,458</td>
<td>$(40,099)</td>
<td>$(11,047)</td>
<td>$(25,000)</td>
<td>$4,250</td>
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<td>$ -</td>
<td>$ -</td>
</tr>
<tr>
<td>Net Income/(Loss)</td>
<td>$(8,602)</td>
<td>$169,060</td>
<td>$(85,221)</td>
<td>$7,355</td>
<td>$(176,505)</td>
<td>$(258,644)</td>
<td>$71,885</td>
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<tr>
<td>Operating Budget</td>
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<td>$1,455,617</td>
<td>$1,715,491</td>
<td>$1,825,280</td>
<td>$1,747,317</td>
<td>$2,090,339</td>
<td>$2,499,323</td>
<td>$2,725,486</td>
</tr>
</tbody>
</table>

Conference Profit | $309,883 | $260,428 | $173,125 | $405,825 | $198,256 | $168,948 | $449,848 | $560,133 |

These financial statements have not been subjected to an audit or review or compilation engagement, and no assurance is provided on them.

Projected Reserve Balances:

- **WRA (net of projected 2022 deficit)**
  - **2022 Approved WRA**
  - **2023 Proposed WRA**
  - **2024 Proposed WRA**
  - **2025 Proposed WRA**

- **TOTAL RESERVES**
  - **2022**
  - **2023**
  - **2024**
  - **2025**

- **Net Income/(Loss)**
  - **2022**
  - **2023**
  - **2024**
  - **2025**

- **Total Projected Reserves**
  - **2022**
  - **2023**
  - **2024**
  - **2025**
### Proposed 2023 Member Dues

<table>
<thead>
<tr>
<th>Tier</th>
<th>Population</th>
<th>2023 Proposed Rates</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Fewer than 25,000</td>
<td>$1,000</td>
</tr>
<tr>
<td>2</td>
<td>25,000 – 49,999</td>
<td>$1,250</td>
</tr>
<tr>
<td>3</td>
<td>50,000 – 74,999</td>
<td>$2,450</td>
</tr>
<tr>
<td>4</td>
<td>75,000 – 99,999</td>
<td>$3,600</td>
</tr>
<tr>
<td>5</td>
<td>100,000 – 124,999</td>
<td>$4,475</td>
</tr>
<tr>
<td>6</td>
<td>125,000 – 149,999</td>
<td>$5,600</td>
</tr>
<tr>
<td>7</td>
<td>150,000 – 174,999</td>
<td>$6,850</td>
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<tr>
<td>8</td>
<td>175,000 – 199,999</td>
<td>$7,875</td>
</tr>
<tr>
<td>9</td>
<td>200,000 – 224,999</td>
<td>$8,775</td>
</tr>
<tr>
<td>10</td>
<td>225,000 – 249,999</td>
<td>$9,725</td>
</tr>
<tr>
<td>11</td>
<td>250,000 – 299,999</td>
<td>$10,800</td>
</tr>
<tr>
<td>12</td>
<td>300,000 – 399,999</td>
<td>$11,950</td>
</tr>
<tr>
<td>13</td>
<td>400,000 – 499,999</td>
<td>$12,775</td>
</tr>
<tr>
<td>14</td>
<td>500,000 – 749,999</td>
<td>$13,575</td>
</tr>
<tr>
<td>15</td>
<td>750,000 – 999,999</td>
<td>$14,300</td>
</tr>
<tr>
<td>16</td>
<td>1,000,000 – 2,499,999</td>
<td>$15,150</td>
</tr>
<tr>
<td>17</td>
<td>2,500,000 – 4,999,999</td>
<td>$15,900</td>
</tr>
<tr>
<td>18</td>
<td>5 million +</td>
<td>$16,725</td>
</tr>
</tbody>
</table>

### Reuse Related Business

<table>
<thead>
<tr>
<th>Tier</th>
<th>Revenue</th>
<th>Dues*</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Less than $999,999</td>
<td>$625</td>
</tr>
<tr>
<td>2</td>
<td>$1 million – $1,999,999</td>
<td>$1,875</td>
</tr>
<tr>
<td>3</td>
<td>$2 million – $4,999,999</td>
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<td>$5 million – $9,999,999</td>
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</tr>
<tr>
<td>5</td>
<td>$10 million – $14,999,999</td>
<td>$5,600</td>
</tr>
<tr>
<td>6</td>
<td>$15 million – $19,999,999</td>
<td>$6,850</td>
</tr>
<tr>
<td>7</td>
<td>$20 million – $24,999,999</td>
<td>$8,075</td>
</tr>
<tr>
<td>8</td>
<td>$25 million +</td>
<td>$9,325</td>
</tr>
</tbody>
</table>

*Includes a primary state section membership. Additional state sections = $450

### Institutions, Affiliated Agencies, and Organizations

$400 flat fee