IMPORTANT NOTE: Please complete all items. This outline is formatted to complete on a computer and does not leave adequate room for hand-written responses.

Submitted by: Richard L. Gerstberger, rgerstberger@tapresource.com

Organizing WEF Committee (or Other Group): WEF Utility Management Committee

Supporting WEFTEC Program Committee Symposium: Management Symposium

**SESSION DESCRIPTION**

Proposed Session Title: Creating A Sustainable Organization: Eliminating Organizational Culture and Demographic Barriers

Session Format: (check one): Platform ___ X _____
Panel Discussion ______
Combination of Both ___

Brief session description (to be used to judge the session and in publicity if selected; a paragraph or two is adequate, but more can be provided if needed):

An understanding of organizational culture is important for the development of any kind of organizational change program, including EUM. The more consistent a change program is with the underlying aspects of the organization’s core culture, the more likely the change program will take hold and significantly impact the organization. If the culture is not supportive and aligned with the organization’s mission and purpose then any change program needs to focus first on changing the culture so that it is aligned.

Employees from a different age cohort, ethnicity, gender, department, or new hires may see current practices through different lenses. Tensions, static, friction, and conflict, both acute and chronic, can be the result. It is critical for organizations to understand what makes different workers “tick”, both to attract and retain the best talent and to increase productivity of existing staff. All people wish for their lives and careers to be meaningful; however, “meaning” looks different to the different generations, such as GenX and GenY.

Is this session on a “hot” topic? YES NO
Why? This technical session combines two “hot” topic issues of critical importance to today’s utility: organizational culture and workforce demographic. Both topics are of critical importance to utilities as they work to effect significant change and organizational sustainability.
How is the information in this session different or unique from what may come from the call for abstracts? While these two topics are of significant importance—see “Hot” topic discussion above—they have not been receiving significant attention at recent conferences.

Session keywords: (List or select from attached list)
Organizational Culture, Sustainability, Effective Utility Management, Organizational Change, Alignment, Employee Demographics, Generational Differences

AUDIENCE INFORMATION
Who is the target audience for this session? (List or select from attached list)
Utility Managers (all levels), Governing Boards and Commissions, Consultants.

Does this session apply to professionals in water, wastewater, or stormwater? (circle all that apply)
WATER WASTEWATER STORMWATER

These are important topic for all three audiences.

Estimated Attendance: Full house of course.

SESSION DETAILS
Will this session require different set up (standard is theater seating, podium, head table seating for 2 people, 1 LCD projector/screen)? YES NO If yes, why and what is needed?

Standard room setup if fine.

Is this a full session or half session? FULL HALF
A full session consists of 3 hours of presentations with a ½ hour break in the middle; half sessions are 1 ½ hours with no break. Full Session

Will all speakers provide a manuscript for the proceedings? YES NO If no, please justify.

Will any speaker require any assistance (registration for the session, etc.)? YES NO If yes, please justify.

Proposed Moderator: Please note that we will send all future correspondence regarding this session to the moderator unless you specifically request here that someone else be included on all communication.
Name: Tom DeLaura Email: tom.delaura@eramosainternational.com
Please include Richard Gerstberger, rgerstberger@tapresource.com in correspondence related to this proposal.
Proposed Assistant Moderator 1:
Brian Wheeler  BWheeler@tohowater.com

Proposed Assistant Moderator 2:
Donna Wies  donna_wies@unionsanitary.com

Proposed Speakers and Topics:
Please list each speaker, and include a one to three page abstract in this proposal for each topic or speaker in the session. If this is a panel, please include the list of speakers and any more detail needed for their topics.

Speaker 1:
Name – Richard Gerstberger
Affiliation – TAP Resource Development Group
Title of Presentation – Organizational Culture: The Key to Effective Change
Email: rgerstberger@tapresource.com

Speaker 2:
Name – Rick Nipper
Affiliation – Toho Water Authority
Title of Presentation – Creating an Employer of Choice at Toho Water Authority
Email: rnipper@tohowater.com

Speaker 3:
Name – Karen Pallansch
Affiliation – Alexandria Sanitation Authority
Title of Presentation – Fostering a Positive Organizational Culture at Alexandria Sanitation Authority using Continuous Improvement
Email: klpallan@alexsan.com

Speaker 4:
Name – Myron Olstein
Affiliation – Black & Veatch
Title of Presentation – Our Changing Workforce: Latest Utility Demographics
Email: olsteinma@yahoo.com

Speaker 5:
Name – Kathi Mestayer
Affiliation – KMA Consulting
Title of Presentation – Organizational Culture and Demographics: What They Are and Why it Matters
Email: kwren@widomaker.com

Speaker 6:
Name – Dr. Nicki Pozos  
Affiliation – HDR  
Title of Presentation – Next Generation Mentoring: Helping Younger Workers Find Meaning  
Email: Nicki.Pozos@hdrinc.com

Alternate Speaker:  
Name – Donna Wies  
Affiliation – Union Sanitary District  
Title of Presentation – Getting the Most From the Staff You’ve Got: Creating a Culture of Employee Engagement at USD  
Email: donna_wies@unionsanitary.com

Alternate Speaker:  
Name – Rob McElroy, P.E.  
Affiliation – Daphne Utilities  
Title of Presentation – Building a Winning Team Culture from day One  
Email: rob@daphneutilities.com

ACKNOWLEDGEMENTS
By submitting this, I agree that I have informed the proposed speakers that all are required to prepare a paper for the proceedings, meet all deadlines associated with the presentation, and are responsible for associated registration, transportation, and housing fees, unless an exception is specifically requested above and granted by WEF before final acceptance of this proposal. Moderators and Assistant Moderators have also been informed that they are responsible for their own registration, transportation, and housing fees.

Submitter sign here:

Richard L. Gerstberger
ORGANIZATIONAL CULTURE: THE KEY TO EFFECTIVE CHANGE

Richard L. Gerstberger
TAP Resource development Group, Inc.

Organizational change is all about changing the way things get done within the organization; which means changing the culture. The true nature of organizational systems is a pattern of dynamic relationships. This pattern at the organization level describes the organization’s culture. Research has determined that an organization’s culture has a very powerful influence on the organization; so powerful, in fact, that its impact supersedes all other factors when it comes to organizational performance.

Culture is “how we do things around here in order to succeed”. It has everything to do with implementation and how success is actually achieved. A management idea, no matter how good, will not work in practice (implementation) if it does not fit the culture of the organization. An organization can have the most superb mission and strategy, but if its culture is not aligned with, and supportive of, that strategy, the strategy will either stall or fail.

While no organization has a pure culture throughout, successful organizations have a definite core culture. The core culture is central to the functioning of the organization, forming the nuclear core for the way in which that organization operates in order to succeed. It is critical that the core culture be aligned with the organization’s strategy and core leadership practices. Alignment is central to any organization’s effectiveness. Without it, focus is lost and energy wasted; as people, systems and processes work at cross-purposes with one another.

An understanding of culture is particularly important for the development of any kind of organizational change program. The more consistent a change program is with the underlying aspects of the organization’s core culture, the more likely the change program will take hold and significantly impact the organization.

This presentation will discuss the important connection between a utility’s culture and the ability of leadership to implement change. It will provide insight into how to understand an organization’s culture, how to initiate cultural change, and how to develop change programs that are consistent with a culture aligned with the organization’s mission and vision.
Creating an Employer of Choice at Toho Water Authority

Rick Nipper
Toho Water Authority

Toho Water Authority (Toho) was founded in October 2004. Toho subsequently began the process of creating an identity and establishing a Strategic Plan that will guide the company toward that goal. Five strategies were established by the Toho Board of Directors: Customer Service, Water Supply, Workforce, Financial Health, and Infrastructure. The discussion in this presentation will primarily focus on the Work Force Strategy. I will discuss the initiatives Toho has taken, and future plans, to create a strong work force through communication, employee and leadership development, specific job training, and incentives employed that motivate employees to meet established performance measures, and plans for continual improvement of the workforce to meet the needs of our customers and employees in the future.

Several of the initiatives employed have earned Toho the Orlando Sentinel Top 100 Companies for Working Families for five consecutive years. The selection for this award is based on benefits offered by companies and the company culture conducive to working families. Toho wishes to provide a safe environment for all employees, provide the resources needed to perform job duties, and a work/family balance to maintain the employee’s physical and mental health, resulting in excellent service to our customers.

The Voice of the Employee (VOTE) Committee was created and made up of non-supervisory employees that meet regularly with Executive Management to discuss workforce issues. Many of the benefits and/or incentives established by Toho were developed by the VOTE committee and approved by Executive Management. This committee provides a platform for open communication between the employees and Executive management and an opportunity to communicate specific needs and workforce improvement initiatives.

Other workforce initiatives implemented by Toho include Gain Sharing, Key Performance Indicators, and Quarterly meetings with Executive management for employees. The Gain Sharing program is focused on team and individual responsibilities, which are reviewed against established measures every three months. The established measures relate to treatment plant compliance, number of work orders completed, and safety related measures. The purpose of the Gain Share program is to reward employees for meeting the established goals, which ensure reliability, efficiency, and operational resilience. It also relates to Financial Health, Customer Service, Water Supply and Infrastructure by keeping staff cognizant of the goals to remain safe, efficient, and compliant with regulatory rules.

Toho established an employee and leadership development program to ensure current and future leaders have the resources needed to continue excellent customer service through succession planning. Toho recognizes the need to regularly train
employees to maintain their job function, keep the workforce efficient, and to continually improve the employee's knowledge in their field. Toho also recognizes the need to continually train leaders, and future leaders to keep them current with best management practices and/or prepare them for leadership roles if/when the opportunity presents itself.

Key Performance Indicators (KPI's) have been established for all departments within the Toho Water Authority. The KPI's are collected through a computerized management maintenance system (CMMS) and used to measure the workforce productivity. These measures are presented to the Toho Board of Directors quarterly and open for discussion. One important KPI measured that is directly related to workforce is the number of training hours per employee. Toho has established a specific measure of training hours needed per employee to ensure job knowledge and performance.

Toho recently conducted an employee survey with the intent to measure the employees job satisfaction and working conditions at Toho. The survey was allowed to remain anonymous to ensure all employees felt comfortable with their responses. The final results were mostly positive in relation to job satisfaction. However, there were areas identified that management will address through communication and other programs. Toho followed through by hiring a consultant to work with various groups within the company. His role is to get an understanding of the less than satisfactory areas that were identified and to communicate to Executive Management opportunities for improvement.

The Toho Water Authority is a relatively young company established in 2004. Toho has established several initiatives to maintain an effective, efficient, and satisfied workforce for our customers. Toho's workforce is the foundation that will meet the goals to accomplish; Customer Service, Water Supply, Workforce, Financial Health, and Infrastructure. The absence of a strong workforce will result in a negative impact to all other strategies. Toho will continue to look to the future and maintain a strong workforce to, Provide reliable, cost effective, and responsive water services to our customers while protecting public health and the environment. Toho is committed to "staying the course" to meet the goals and maintain the strategies established to remain a strong company committed to excellent customer service.
The Alexandria Sanitation Authority (ASA) Water Resources Recovery Facility is a 54 MGD wastewater treatment facility located in Alexandria, Virginia. The facility serves about 350,000 people in the City of Alexandria and adjacent portions of Fairfax County. The plant discharges a very high quality effluent to the Potomac River and the Chesapeake Bay. Because of the sensitivity of the ecosystem, its urban location and its proximity to its neighbors, ASA faces unique challenges in managing its business and delivering efficient services. This presentation will explore the unique demands ASA faces in the municipal water/wastewater profession and how levering continuous improvement practices, such as Environmental Management Systems, Strategic Planning, Talent and Compensation Management, and Sustainability Decision Criteria tools, have enabled ASA to foster strong values among its employees while guiding consistent decisions fostering short and long term success. This is critical as ASA faces a new and exciting time: integrating community needs in terms of wastewater assets directly into a developing high density urban environment by providing much needed and desired green space as an integrated part of its wastewater treatment facilities. This new and very open role of the utility requires a distinctly different approach to hiring, operations, problem solving and community response and service than has been fostered before.

Continuous improvement tools provide a framework upon which to build a strong culture of understanding and community service. Also important to their successful use is the ability of senior leadership to connect the dots between what appear to be disparate tools and ideas and find and leverage cross connections and linkages. ASA has developed a Balanced Scorecard approach to help visualize linkages across its continuous improvement tools and its overall strategic direction. This ensures alignment between ASA’s citizen Board, senior leadership and employees so that every step is in the direction of ultimate success.
Our Changing Workforce: Latest Utility Demographics

Myron Olstein
Jason Jennings

In 2005, the study *Succession Planning for a Vital Workforce in the Information Age*, jointly sponsored by the Water Research Foundation (then AwwaRF) and the Water Environment Research Foundation, was published. Among its findings about the U.S. workforce were:

- The U.S. workforce is aging from just over 39 years to a projected 41 in 2020.
- The U.S. workforce is becoming more gender diverse
- The U.S. workforce is becoming more ethnically diverse
- The percentage of the workforce that is 55 or older was expected to increase from more than 12% in 2000 to 20% in 2020

As part of that study a utility survey was conducted which received responses from a representative sample of 126 utilities. Compared to the U.S. workforce:

- The utility workforce was older – the average age for all utilities was 44.2 years
- The utility workforce was significantly less gender diverse
- The utility workforce was as or slightly more racially and ethnically diverse

As a result of the utility survey, the study estimated that 50% of the then existing utility workers would be eligible to retire within the next 10 years and recommended that utilities develop and implement workforce programs as soon as possible. The programs needed to:

- Incorporate more technical training to reflect the increasing levels of automation in utilities.
- Implement knowledge management/capture programs to capture the vital knowledge that was likely to leave utilities in this generational turnover
- Incorporate generational awareness, recognizing that newer generations might have different value systems and respond to different rewards than those retiring.

**What has happened since?**

The U.S. and utility workforce today is older than the projections in that study:

- The median age of the U.S. workforce is nearly 41.5 (as of the 2008 survey)
- The median age of the utility workforce is estimated at 46.
The accelerated aging of the workforce can be attributed to the recession and the rising cost of health care. Many older workers need to keep working as a result of losses in their retirement programs and the escalating costs of health insurance. Younger workers are typically a casualty of recessions since it hits those industries with the youngest workers and some younger people have the option of staying in school.

What Have Utilities Done?

As utilities have seen their workforce age (one utility contacted for this paper has an average employee age of more than 71 with 64% of existing employees eligible for retirement today) they have been developing and implementing programs to deal with what may become a more accelerated turnover than was foreseen in the 2005 report. Most utilities have different programs for white collar and blue collar positions. White collar efforts are called succession planning, blue collar efforts typically involve knowledge management/capture and expanded technical training programs.

One utility has been using the Knowledge Capture methodology detailed in the Succession Planning study for their O&M functions. This effort has been expanded to include updating SOPs and the use of different methods to provide tacit knowledge to new employees including the development of checklists and increased reliance on flowcharts. As a result of the early success of these efforts, the program has been expanded to white collar positions.

Another utility has been focusing on improving the readiness of new employees focusing on summer internships to improve the readiness of new hires and expand their labor pool. Some utilities have been using shadowing for management positions. Others have combined “twilight tours” with shadowing.

What Will be Presented At WEFTEC 12

We will conduct a survey to update the worker demographics and retirement eligibility data in the 2005 Succession Planning study. As part of that survey we will also seek to identify programs employed by utilities and identified those which appear to have worked best.

Co- authors

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Jason Jennings 240-501-0450 juggernautre@hotmail.com
It is often hard for us to “see” the culture of our organizations. It’s a bit like the fact that we can’t hear our own regional accents. The way we talk is so familiar that it just sounds *normal*. Likewise, the way we do things just seems like the *right way* to do it, or even the *only way*. Employees from a different age cohort, ethnicity, gender, department, or new hires may see current practices through different lenses. As a result, others’ values, beliefs, language and behaviors can seem illogical, counter-intuitive, or just plain wrong, simply because of one’s own cultural vantage point. Tensions, static, friction, and conflict, both acute and chronic, can be the result.

Take, for example, a regional utility that had conflicts between its own headquarters engineering staff and its member counties’ staff. The HQ engineers would come up with the “best” technical solution to a difficult issue, only to hear from the county staff that it wouldn’t sell politically. From the HQ point of view, the county staff were “contaminating” the decision process with politics. From the county staff point of view, the HQ staff had their heads in the clouds; in the real world, they said, if you can’t get a solution approved, then it can’t be the “best” one. The two groups’ fundamentally different meanings of “best solution” reveal their underlying values and assumptions.

Other examples include the use of body language, spatial orientation (where do you stand when talking to someone?), eye contact, and use of formal titles, all of which can send unintended messages, depending on cultural framework.

The presentation will provide many examples (redacted) from water and wastewater utilities of cultural differences that are invisible, and sometimes frustrating, to others. Example subcultures within utilities will include such groups as: operating shifts, maintenance crews, department, line supervision, management, plant/office/field staff and others.

In addition, we will provide a framework for identifying cultures and subcultures, getting an understanding of their basis in practice and history, and leading groups and individuals to understand their own, and others’ cultural viewpoints.
Next Generation Mentoring: Helping Younger Workers Find Meaning

Nicki Pozos, Ph.D., P.E.
HDR Engineering, Inc,

In recent years, there has been increasing attention on the impending workforce shortage in the water industry. Organizations can expect greater competition for top talent, both with other organizations within our industry, as well as from outside competitors. As such, it is important to understand how younger workers “tick” to create an environment that both retains and motivates them. Unfortunately, much of the literature on generational differences focuses on the outer manifestations of each generation’s value system, rather than on understanding what fundamentally motivates them. As a result, many organizations implement policies intended to target younger workers that end up missing their mark.

All people wish for their lives and careers to be meaningful; however, “meaning” looks different to the different generations. Idealism has been widely associated with Gen Y, and often takes the form of wanting to do something that supports their social or environmental ideals. Gen X is known more for cynicism than for the search for meaning, but meaning drives much of Gen X behavior, including the drive for work life balance. Gen Xers particularly value having their work and life be an authentic representation of who they are. For them, creating something that has their particular “stamp” on it may trump doing something more routine that accomplishes idealistic goals.

So knowing how important meaning is to younger workers, how can an organization better motivate these individuals? Approaches that will be discussed include:

- **Support broader thinking about meaningful work:** Many of us see things in black or white: either I join the Peace Corps and do something “meaningful” or I sell out and work for corporate America. In reality, professionals who have been successful in creating meaning in their lives tend to do so through a mosaic of activities in both their professional and personal lives.

- **Train mentors to support the whole employee, not just the professional:** Gen Xers in particular need to feel that they can be themselves in the workplace – that they’re not just the sum of their professional accomplishments. Mentors should be explicit in seeing and supporting the individuality of these workers, including characteristics and interests that are not directly related to their job efficacy.

- **Support fundamental diversity at an organization level.** Effective organizations create space for individuals that deviate from the unspoken “rules” of the
workplace. Public promotion of effective individuals who deviate from workplace social norms drives younger worker satisfaction, enabling them to see their place of work as a place for them.

The intent of this presentation is to both familiarize the audience with the value systems that underlie the behavior of Generations X and Y, as well as to outline steps that a mentor or organization can take to motivate younger workers.
Getting The Most From The Staff You’ve Got:
Creating a Culture of Employee Engagement at USD

Donna Wies
Union Sanitary District

In today’s economic climate, with many agencies facing hiring freezes, furloughs and even lay-offs, it’s critically important to get a high return on investment from every employee. You can’t afford the wasted energy, ideas and productivity of a disengaged employee.

Beginning with the Strategic Plan, we recognize that achievement of our mission, customer and financial objectives depends on a skilled, engaged workforce. This presentation will explore how USD has incorporated employee engagement throughout the organization as a key strategy to achieve our Mission and showcase examples of how employee engagement has benefited the District.

The organizational of the District is designed to facilitate employee involvement at all levels. Employees are encouraged to actively participate in addressing workplace issues through:

- Work teams
- District committees
- Taskforces
- Process improvement projects
- Knowledge capture and training module development

Employee engagement starts at the team level. Work teams are designed to provide members opportunities to contribute ideas and actively participate in activities that influence their work life.

In addition to work teams, USD has twelve standing committees that reach across the District and involve employees at every level. At any given time, there are also several taskforces addressing specific issues. All employees are given training in problem-solving and meeting facilitation in order to effectively participate in group projects.

Employee engagement is tracked and measured on the District’s balanced scorecard. A key employee objective is to “Foster a collaborative labor-management relationship that encourages new ideas and continuous improvement”. Current measures of engagement include the number of employees submitting process improvement projects that are recognized through the USD Alternative Compensation Program and
the percentage of non-management employees serving on District-wide committees or taskforces.

Employees are also an integral part of the District’s competency-based training program. Senior employees contribute content to all standard operating procedures and training modules and are prepared through train-the-trainer programs to train and assess their peers.

By incorporating employee engagement into the strategic plan and tying it to customer, financial and process objectives, USD is reaping the benefits of employee engagement and contribution.
Building a Winning Team Culture from Day One

Rob McElroy, P.E.
General Manager
Daphne Utilities

A winning team culture doesn’t just “happen”. It’s something that is built day in and day out. Being part of a “team”…feeling like you belong…seeing yourself as a vital part of a winning organization... transcends all backgrounds, ages, race and generational differences. The change may come slowly at first (like the metaphoric “turning the aircraft carrier at sea”), but persistence always wins out in the end. Regardless of the culture your utility may have today, you can transform what you have into something powerful and effective over time by taking small but important steps each day.

Start It Off Right – First impressions mean everything, including the first impression a job candidate forms of your utility during the job interview. Ensure that your utility looks prepared and professional by providing training and oversight of those allowed to interview job candidates. You wouldn’t hand your car keys to someone without a driver's license. Don’t hand the first impression of your company to someone not trained to do it right.

Make an Offer They Can’t Refuse – Every job offer should start with the magic words “I WANT YOU”, (as in “I want you to join our team and help us win”). Let them know they are joining your winning team from the first day and that you are glad to have them.

Get Them Onboard Quickly – Most universities have mandatory meal plans for incoming freshmen. This is not to make money, but rather to increase student retention. Left to themselves, new students become isolated and alone. By taking part in group activities such as regular meals in a cafeteria, these same students quickly feel like they belong, develop support groups and make friends…all of which result in increased student retention. At our utility, the entire department takes a new hire to lunch in their first week to do the same. It’s a great way to have the new hire start bonding with the rest of the team in a casual, low-stress environment.

Nice to Meet You - We personally introduce every new hire to everyone in their chain of command in the first day of their employment. This goes from the supervisor, to the department manager, the operations manager and the general manager. They also meet critical personnel such as the customer service representatives in the front office as well as the HR and finance managers. Each person they meet welcomes them and reiterates that they have joined a great, winning team!

Outfitting the Team – Just like a professional sports team, we insist that employees wear the full uniform of our team. In this case, it includes the usual shirts and pants but also the proper ballcap of our Utility (not their favorite college football team cap). We
also emphasize wearing the uniform properly (shirt tucked in, clean, not wrinkled, etc.) and have uniform inspections to reinforce this.

Looking Out For Family – When one of our team faces hardship, the rest of the team comes together to help them and their entire family. We allow sick time donations (on a volunteer basis only) and send baskets of food and drinks to the family’s home when tragedy strikes. We have found that this helps the employee and their family much more than a plant or a wreath at a graveside service.

The benefits of this approach are striking! Our teams work remarkably well together – person to person and department to department. This has led them to trust one another in significant ways beneficial to the company. Since 2006, our workload and customer count has risen more than 10%. Yet, winning teamwork has allowed us to lower staffing levels nearly 12% during the same period, saving more than $250,000 per year in labor costs and all without a single layoff. We have been noted as a “Winning Workplace” by the Wall Street Journal and featured as a “Top Small Company Workplaces” in America by Inc. Magazine. This winning teamwork results in high employee engagement which is critical for the success of any utility company. A winning team of engaged employees are the only ones capable of delivering the outstanding level of customer service necessary to effectively communicate your value to the customer. Isn’t it time to start building YOUR utility’s winning team culture?