

**CalDesal 2021-22 Strategic Plan**

***“A Decade of Desal 2010-2020 – Building onto our Foundation”***

**FINANCIAL STABILITY**

Just as the water industry advocates for a diversified water supply portfolio, our organization should pursue a strategy of a diversified financial portfolio to encourage longevity and success.

**Diversify and strengthen current revenue streams:**

* **Investigate feasibility of adjusting member and associate annual membership dues**
* Bylaws amendment required for any change
* Prepare a menu of options for the Executive Committee to move any change forward into 2021
* **Increase Annual Conference registration fees**
* Increase annual conference profitability
* Grow the conference attendance
* Increase the ticket prices to reflect the value received and compare our present registration fees with other similarly situated water organizations
* Implement any needed structural changes such as extending the conference to two full days, adding a dinner, or offering one-day registration
* Look at refining the differential between member, non-member, and vendor table conference registration levels
* Prepare a menu of options for increased conference registration for the Executive Committee to vote on to move this financial piece of the membership plan forward to begin implementation in 2021
* Review current prices of current sponsorship packages for ACWA Spring and Fall conferences, i.e. free registration and other perks with sponsorship
* **Expand on current sponsorship structure**
* Implement website sponsor advertising
* Create opportunities for exclusive sponsorships
* Refine and increase different levels of sponsorship
* **Investigate use of Virtual Events**
* Create backstop to funding loss for the traditional Spring and Fall ACWA conference mixers if pandemic meeting prohibitions are extended past 2020
* Design other virtual standalone events, like the Townhall or educational webinar, to augment traditional ACWA mixers when in-person attendance returns
* **Utilize “Pass the Hat” financing when necessary for special projects**
* Large items not currently in budget and only on a voluntary, as-needed basis after an affirmative vote by the Executive Committee

**MEMBERSHIP GROWTH**

* **Recruitment**
* Capture entire segments not currently represented in membership and ensure that all promoters and stakeholders in the desal industry are recruited
* Build a list of desal vendors including reverse osmosis membrane manufacturers, pressure vessels makers, high pressure pumps manufacturers, stainless steel valve and piping manufacturers and fold it into the existing membership target excel spreadsheet
* Circulate into current member agencies and tap into their relationships/member prospects on a regular basis
* Raise organization’s profile to gain new members
* Create process to woo back former members who have previously left the CalDesal family
* Create a video of testimonials from current members and associates to entice potential members to join
* Incentivize current members and associates to participate in recruitment by designing an annual award for most members recruited or create a special discount on annual conference registration
* Research and then act on recruitment opportunities with newly formed groundwater sustainability agencies
* **Retention**
* Build membership by retaining members and associates
* Check in with members and associates on a periodic basis through the Member Survey as an annual opportunity for the members to give key input on organizational effectiveness
* Create a system to ensure prompt collection of annual dues
* Generate a “Value Statement” document that quantifies and lists benefits to retain current members and associates which is updated and distributed annually.
* Schedule a “road show” to visit members and associates at their offices and headquarters for a local touch
* Investigate feasibility of planning a “Meet the CalDesal Member” session with a member once a quarter with the member introducing themselves and telling the audience about their agency or company

**OUTREACH COMMUNICATIONS**

* **Expand external communication**
* Refresh the CalDesal brand products with new logo
* Overhaul website
* Increase social media presence
* Develop key messages
* Create proactive messages to combat the negative and false statements from NGOs that have swayed regulators
* Utilize outreach communications committee to become nimble
* Engage in assertive tweeting and create an Instagram account to attract millennial folks who influence the decision-makers who work in the state legislature, at state agencies, and in the water industry
* Create targeted fact sheets on specific desal topics which might come in handy during workshops to rebut negative reports from academia and the NGOs
* Produce public education materials to assist members to "sell" benefits of specific projects that are in the works
* Educate external stakeholders on the benefits of desal projects and being connected to CalDesal
* Proactively reach out externally to the rest of the water industry, state government, and the private sector

**Improve Internal Communication**

* Further refine the e-newsletters and website with project updates
* Continue to place key documents and updates on the members’ only website
* Feature members and associates’ projects on website as case studies
* Place requests-for-proposals (RFPs) from CalDesal members on the website which could attract additional member value

**Outreach Activities**

* State Legislators and staff education on desalination
* Create the first CalDesal desalination lobby day in Sacramento. Have groups of participants visit legislators to citizen educate them on our key policy issues in the morning. Have a keynote speaker at a lunch at one of the local restaurants and brief attendees. Have a reception the night before with legislators and their capitol office staff
* Identify and work with local State Assembly member or Senator supportive of desalination to craft an informational hearing on the evolution of technology in the desalination industry and advances in salinity management
* Lift excerpts from an informational legislative hearing and capitalizing on it for the benefit of the association and its members is the type of state legislative interaction that could result in positive communication and education
* Organize local tours and dinners with Southern California legislators and their district office staff with CalDesal Executive Committee and other members that could bring many benefits: on-the-ground visual education, exposure to direct alternative messaging, and establishment of relationships into the future, for example. Organizations can get caught up in a Sacramento-only mindset that overlooks the rich opportunity that exists in local “backyards.”
* Schedule meetings in the local district offices with staff that are more familiar with local issues to match what is occurring in Sacramento would be advantageous. The District Office staff tend to stay in their positions longer and are more familiar with the local issues for their legislative members and could offer an edge on the advocacy front
* Create a “Desal 101” video which could be housed on our website and sent to legislators and their staff to help educate them positively about the water supply technology

**POLICY IMPACT (State Legislature, State Regulatory agencies, Federal Legislative branches, and Statewide Organizations)**

* **Collaboration with other Statewide Organizations**
* Effectively participate in regional water issues to help build coalitions to leverage our existing relationships and make new relationships that will help move CalDesal policy goals forward
* Coalition resources should be shared/aligned for maximum impact/benefit of organization
* Link up more effectively with Water-reuse industry
* CalDesal could coordinate more with AWWA, IDA, ASCE, and WateReuse on providing a counter point to negative desal reports
* Linking synergies with Water Reuse Association
* Emerge from the shadow of larger, well-known water associations. Collaborating with larger statewide organizations like ACWA and CMUA when it is beneficial and utilizing efficiencies when possible, while still maintaining a separate branding for subject matter expertise
* **State and Federal Advocacy on Issues (Desal Technology, Ocean Plan Amendment, Salinity Management)**
* Meaningful and active regulatory and legislative engagement in Sacramento
* Have a voice in Sacramento for public advocacy and education
* Increase lobbying presence and reach at both the State Legislature and the regulatory agencies
* Lobby regulators to streamline the permitting process and counterproductive State Water Resources Control Board regulations
* Plan towards hiring a Sacramento-based Regulatory contract lobbyist
* Develop op-eds and provide expert testimony
* Work towards securing state earmark and grant opportunities for desal and salinity management in upcoming state general obligation water bonds and federal bills
* Work to obtain federal funding for brackish and seawater desalination and salinity management
* Testify on behalf of CalDesal for member and associate local projects
* Defend desal technology from misleading information
* Become recognized as the trusted voice and local authority in Sacramento for desalination technology
* Work on salinity management in groundwater basins
* Link synergies with brackish groundwater treatment systems as these will be a critical tool for achieving groundwater sustainability via the Sustainable Groundwater Management Act (SGMA)
* Prepare for the reopening of the State Water Board Ocean Plan amendment

**ACCOUNTABLE GOVERNANCE**

* **Update Bylaws –** re-examine original bylaws and second version to draft an updated third version
* Form a special, limited-term Bylaws Committee to update CalDesal bylaws
* Consider requirement that Committee Chairs be a privilege afforded only to voting members
* Member dues structure would need to be changed via bylaws change
* **Executive Committee meetings**
* Continue meeting monthly, preferably on the Zoom platform
* **Annual Audit**
* Hire a professional to audit the organization through CAMS and present the findings to the Executive Committee
* **Increase Transparency**
* Produce a 2021-2022 organization-wide calendar that lists major meetings and events
* Continue compiling and placing material on the members’ only website page
* Continue adding documents like the Election Process to practice inclusion and widen leadership opportunities
* **Additional Contract Staff**
* Current (ED) recruitment could be a bridge to recruiting and building a larger (budget) organization over next three to five years
* **Committees**
* Keep current committees in place but be open to member requests for additional committees if the need arises