

## PLANNING, ORGANIZING, CONDUCTING and REPORTING FOR TWUA DISTRICT and CHAPTER MEETINGS

### Background

For many years, the District (or Chapter) meetings have been the foundation for providing training to TWUA members. These meetings enable operators to receive valuable training on current, topical subjects that are held at times and locations that are convenient to members within the District. Typically, by just attending a majority of these monthly meetings, a member can receive sufficient credit for license renewal. **This is a tremendous benefit associated with membership in TWUA – one we must maintain.** Although everyone is encouraged to seek out classes needed to progress to the next higher licensing level or to improve the expertise needed to perform their job, District meetings by themselves can provide a substantial portion of the training required for operators.

TWUA is the only organization in Texas that provides this type of ongoing training program. With the continued growth of training providers and training opportunities, we need to ensure that these District (or Chapter) meetings maintain the high level of professionalism that our members expect and that TCEQ requires. Anything less runs the risk of our losing the interest and participation by our members and the approval from TCEQ. All training events are under increased scrutiny from TCEQ; not just those provided by TWUA. Training providers, such as TWUA, must ensure that sessions are conducted by qualified subject matter experts on topics approved (in advance) for credit by TCEQ. Training must meet requirements set forth in Chapter 30 of TCEQ's rules and in RG (Regulatory Guidance) 373. Failure by even a small number of TWUA Districts to comply with these requirements can jeopardize this excellent program for everyone.

Most Districts are working hard to provide quality training to their members. However, as an Association with a long chain of Regions, Districts, Sections and Chapters, we are only as strong as our weakest link. Several aspects of these training functions must be standardized to ensure that a member anywhere in Texas can expect to receive the same quality of training and so that TCEQ can be assured that we are meeting their regulatory requirements.

TCEQ has made major modifications to RG 373. The major change by TCEQ calls for approval based on the "actual contact time of the training session". The minimum requirement is one hour of training (Education Program) and to obtain a two hour credit, meetings must have a minimum of 90 minutes training and 30 minutes peer to peer discussion. At no time will more than 30 minutes peer to peer be allowed as training credit per TCEQ rule. We must work to ensure that our District meetings meet the current minimal requirements.

What is described below is a procedure that must be followed by all TWUA Districts that allows this Association to prove to TCEQ that these meetings surpass minimum reasonable requirements for granting 2 hours of credit. Most of what is presented next has already been required by the Central Office, but too often has not been followed by the Districts. Better planning, coordination and reporting are necessary. Procedures must be in place so that we can assure TCEQ that the Association has a credible quality assurance and quality control program.

While minimum standards and established procedures must be followed, each District will still have considerable flexibility in scheduling training sessions and conducting their meetings. Please review the following guidelines and feel free to ask questions or offer suggestions.

## **Planning**

We encourage each District and Chapter to plan as far ahead as possible for speakers and topics. Planning 12 months in advance would be best, even if all the details for topics and speakers were not completed. RG 373 requires pre-approval by TCEQ for all training session topics. The easiest way to receive approval is for the Central Office to submit a list of topics at the beginning of each year that would cover all the Districts. While we will prepare a list of topics that will likely cover most any subject matter that a District would pick as a training topic, we strongly encourage you to submit a list of potential topics by November 1<sup>st</sup> for the following year. This way we can include training topics that you intend to offer, but we might be unaware of.

The TWUA Central Office will then provide TCEQ with a list of these topics at the beginning of each year for their approval. Once this list of topics is approved by TCEQ, Districts will be able to hold training sessions on these or other closely related issues. Any training topic not listed that a District wants to use must be submitted for individual approval by TCEQ at least 60 days before the scheduled time for the meeting (15 days for TWUA review and 45 days for TCEQ review). These submissions will be forwarded through the Central Office to ensure that the subject matter and the presenter meet TCEQ requirements prior to their submission for approval. Central Office will track the approval process at TCEQ and notify the District when final approval is received.

Most Districts, at some point in the year, use vendors to deliver training sessions. This is allowed as long as the vendor does not conduct a sales presentation. For these sessions, the District (and Central Office) must ensure that the presentation does not focus on a particular product or product lines, but rather deals generically with equipment and skill development that is associated with job related requirements for water and wastewater operators. We have spoken with many vendors (and some consultants/engineers) in the past couple months who are eager to schedule District meetings months in advance. The Central Office will be happy to assist you in securing these individuals – just give us a call.

In addition, the TWUA Central Office will develop three to four, hour long training sessions on topics pertinent to water and wastewater operations, which can be used by Districts at their monthly meetings. These sessions will include PowerPoint presentations and/or other audio/visual support as well as written materials as appropriate. These training sessions should be delivered by qualified subject matter experts who are located within each District. Presenters can include District officials or qualified members with significant experience in the subject area. Central Office staff will be available to provide guidance and answer any questions concerning the material contained in these developed training sessions. In addition, the Central Office will be acquiring a library of educational videos that can also be used at District meetings either as a stand-alone session that will include a discussion period moderated by a subject-matter expert or used in conjunction with another related presentation.

Prior to each month's meeting, TWUA Central Office will email every District a current membership roster. This roster will be used to record attendance, verify mailing addresses and other contact information and to report back to the Central Office.

## **Organization**

As always, the logistics for District meetings will be arranged by the officers within that District with some assistance, as needed, from the Central Office. With years of experience, there are typically few if any problems in locating a suitable facility and notifying the membership of the time and place for the meeting. Central Office can mail out post card reminders for District meetings, just be sure to send in the information at least one week in advance of the meeting date. Holding the meeting at the same location, time and day of the month each is fine and it can reduce confusion among the District members. Please make a concerted effort in the next twelve months to get members to attend your meetings as well as to encourage non-members to join TWUA and take advantage of these excellent training opportunities.

## **Conducting District Meetings**

Agendas should be prepared for all District meetings. Each District meeting will include a training session of not less than one hour, a short business meeting for handling the District's affairs, and a time for "peer-to-peer" information exchange. District officers (in particular the President) will be responsible for conducting their meetings in accordance with the prepared agendas. This will include working beforehand with the presenter to ensure that the session is on an approved topic, that it is not used as an opportunity to sell a product or service, that it last for an hour, and that all audio/visual equipment and materials are available for the session.

The formal training session is the centerpiece of the meeting. Care must be taken not only to ensure that the session is on an approved topic but that it is also on a subject of interest to the District's members. This might mean, for instance, that in some Districts where most utilities are on groundwater, increased attention will be made to topics relating to groundwater production and treatment instead of sessions on surface water treatment. Efforts should be made to ensure that many or most of the sessions are on topics of use to both water and wastewater operators if dual credit is desired. It's a good idea to ask your members what they need training on – perhaps even a written response every year or so.

Presenters should be encouraged to use a variety of training techniques that may include, but are not exclusively, a lecture-type format. The use of PowerPoint presentations, short videos, demonstrations and other inter-active, hands-on training are encouraged.

At each District meeting a time for "peer-to-peer" exchange should be conducted. During the opening for the meeting the President should identify members holding "A" licenses (perhaps those holding "B" licenses as well). Special badges can be prepared for easier identification of these individuals. Pointing out these members will enable other attendees to know who they can

talk with to discuss any problems their utility may be experiencing. While this type of information exchange has been a tradition at these Districts meetings, this procedure will take it a step further by encouraging members with less experience to seek out those with many years in the utility business. Holding such a period before or after the formal training session will also provide a time for the presenter to visit informally with attendees and answer any additional questions they may have on the presentation.

A vitally important component of this gathering time is to allow attendees to get to know their neighboring operators. Being able to met and discuss issues with a fellow operator that may live just down the road pays significant dividends when unforeseen problems emerge. As you know, operators are more likely to call on a neighboring operator they have met when a problem or emergency occurs. It allows everyone to know what talents and resources are available within their local area. The water and wastewater operator community is one that seeks not only to improve services and public health for their own customers, but also to assist fellow operators whenever the need arises. Attendance at District meetings is typically the only time operators have the opportunity to meet with other operators and exchange information. We need to encourage this information exchange Utility operators are proud of the work they do and are always willing to share what works best with other operators.

In an on-going effort to improve the quality of these sessions, Central Office staff (and as time permits, Association officers at the state level) will regularly attend these District meetings to monitor the proceedings and follow-up with suggestions for improvements. The Central Office will prepare a survey sheet that will be used when visiting and auditing District meetings. These surveys will be kept in a permanent file at the Central Office. Any complaints regarding the training sessions or the meetings in general will be investigated by Central Office staff and any necessary guidance or assistance will be provided. TWUA will ensure that all District meetings provide the amount and quality of training suggested by RG 373.

## Reporting

The reporting function will be a primary means of our implementing a formal QA/QC process. Each District is required to submit a TWUA Program Report Form for the meeting that complies with the model and content requirements that have been developed by the Central Office. Districts are required to submit the following material to the Central Office within five days of the date of the meeting:

- TWUA Program Report Form
- Electronic copy\* of roster
- Electronic copy\* of program agenda

\* If you do not have the Microsoft programs there are FREE alternatives. Among those, you can download a capable version at [OpenOffice.org](http://OpenOffice.org) or sign up for a free google account and use google docs.

Email these items to Patti Jurgensen ([P.Jurgensen@twua.org](mailto:P.Jurgensen@twua.org)) and a copy to David Moore ([D.Moore@twua.org](mailto:D.Moore@twua.org)).

Central Office staff will review this material and ensure that it meets the requirements established by TWUA and by TCEQ (for Association Meetings under RG 373). Meetings where the training session was not on an approved topic will be rejected by the Central Office. Reports that are not submitted in a timely manner will also be rejected. Minor issues on training content or length will be resolved prior to the next District meeting. Internal controls are in place to ensure that all attendees are active members of our Association. Districts will be notified if any operators attending a District meeting are not paid members of the Association. Membership dues must be paid to obtain credit hours for license renewal. Please help us keep our data base accurate by asking all attendees to check their address as listed on the roster and make any corrections that are necessary. Incorrect addresses (primarily as a result of members moving) cost the Association considerable time and money, plus we want to ensure that all members receive the *Journal* and other important mailings from the Central Office.

Central Office staff will prepare the reports for electronic transmission to TCEQ. Preparation of these reports within the Central Office will reduce errors, allow us to track each District's activities and progress, and ensure that all reports are provided to TCEQ on a timely basis.

## **POLICIES REGARDING APPROVAL OF MEETINGS FOR OPERATOR LICENSING CREDIT**

For the benefit of new District and Chapter Officers, we have listed the policies, which apply to operator licensing and other credit for attendance at meetings of the subsidiary units.

1. A Program Report must be submitted for each and every month, whether or not a meeting is held.
2. Each month's Program Report should be submitted **within five working days** following the monthly meeting to the Texas Water Utilities Association, Central Office, 1106 Clayton Lane, Suite 112 West, Austin, TX 78723.
3. Operator certification credit will not be given for any month for which a Program Report Form is not submitted. Any missing reports will result in receiving no operator licensing credit for the month.
4. Two hours of water and wastewater operator licensing credit will be given for attendance at each District and Chapter meeting with an approved educational program.
5. The program **cannot be less than one and one half hour in length**. This is in addition to any peer to peer time.
6. If a scheduled educational program is canceled due to unavoidable circumstances, an explanation should be made on the Program Report. A training activity of some sort should be substituted. An evaluation will be made based on the Program Report to determine whether training credit will be given.
7. All events involving more than two hours must be approved by the Association and by the Commission on Environmental Quality when operator licensing credit is desired. Program outlines, indicating speakers and times, must be submitted to the T.W.U.A. Central Office at least sixty days prior to the scheduled meeting date. Program Officials will be notified before the meeting date of the number of hours approved for operator licensing credit. The Central Office should be contacted so that an adequate number of "Training Session Attendance Record" cards (with punches) can be used to track attendance. The completed cards, any unused cards, and the punches should be returned to the Central Office within five (5) working days following the event. The Central Office will then prepare the official roster and submit same to TCEQ.

**TEXAS WATER UTILITIES ASSOCIATION**  
***Program Report Form***

1. T.W.U.A. District/Chapter: \_\_\_\_\_
2. Time, Date and Location of Meeting: \_\_\_\_\_  
\_\_\_\_\_
3. Name of Person Submitting Report: \_\_\_\_\_
4. Speaker's Name, Position and Affiliated Organization: \_\_\_\_\_  
\_\_\_\_\_
5. Topic and Description of Education Program (Describe in Sufficient Detail to Document Program Content):  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
6. Length of Education Program in minutes: \_\_\_\_\_
7. Time and topics discussed in peer to peer training: \_\_\_\_\_  
\_\_\_\_\_
8. Length of Meeting in hours and minutes: \_\_\_\_\_
9. Any problems encountered or lessons learned from this month's meeting: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
10. Any other suggestions on improving District meetings, training topics, speakers, etc: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Number of Members Present: \_\_\_\_\_      Number of Guests Present: \_\_\_\_\_      Total Present: \_\_\_\_\_

Please mail a program report each month to:  
**Texas Water Utilities Association**  
**1106 Clayton Lane, Suite 112 West**  
**Austin, Texas 78723-1093**  
**512/459-3124 888/367-8982 FAX: 512/459-7124**

Texas Water Utilities Association

Peer to Peer Training

District \_\_\_\_\_

Date \_\_\_\_\_ Time \_\_\_\_\_ to \_\_\_\_\_

Topic of Discussion \_\_\_\_\_

Problems \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Solutions \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Participants in group

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

## Visiting Member Attendance Record

TWUA members are allowed to receive operator licensing credit when they attend a meeting in another District or Chapter other than the District or Chapter in which their membership is registered. A prime example of this might be a TEEEX Instructor, or a Sales Representative - who may be a member of TWUA in the Houston area, but has a chance (while teaching a course in the area) to meet with a TWUA District located in the Dallas area.

In the past, the only way an individual could receive operator licensing credit for the meeting they visited while in the Dallas area would be for that District's Secretary to send us a "Dual" Membership Application. By doing so, the visitor's name would appear on the "Quarterly Attendance Report" and the Secretary would be able to report the training credits. Whether the visitor was required to pay local dues has always been left up to the District or Chapter. **You may require visitors to pay local dues to receive credit if you wish.** This is really meant to help those who may visit another District or Chapter once a year or so, not those who may visit neighboring Districts or Chapters quite frequently.

A visitor may also be someone who is not currently a TWUA member but plans on becoming one. You can allow someone to attend your district meeting and get credit as a way to recruit them into your district. Please make a special note of this when submitting your reports clarifying that they are not yet a member but you would like for them to receive credit as a visitor and include their SSN or TCEQ License Number (an ID number is very important to ensure they receive credit – we will not have it on file, since they are not a member, and we cannot report their hours without it).

All visitors need to be listed at the bottom of the roster, separate from the list of active members. **The only members who should be listed on the main roster are active members** (the ones who were originally listed in the roster emailed to you for that month). Everyone else (visitors, non members, "active" members not included in the roster originally, etc.) needs to be listed below and separately. Please do not "mix them in" with the active members.

**The monthly roster that is emailed to you is a list of members that were currently active at the time it was created.** Some common reasons why a member may not appear on your district's roster: their membership has expired, they are not a TWUA member, we received a payment recently for their membership but it had not been updated in the database at the time the roster was created, they are a member of another district, or there is a mistake in our database that needs to be fixed. If you have any questions regarding membership, please contact Henrietta Adey (email: [h.adey@twua.org](mailto:h.adey@twua.org) or by phone: 512-459-3124/1-888-367-8982).

**Only those visitors who you want to receive credit should be included at the bottom of the roster.** If you do not intend for a visitor to receive credit, please do not include them in this list. Everyone that is listed below the active members on the roster will be checked against our database to see if they have a current membership in your district. If they are not a member of TWUA or a member of your district, and you have not specified that they are to receive credit as a visitor, their hours will not be reported to TCEQ.

**TEXAS WATER UTILITIES ASSOCIATION  
MEMBER SOCIAL SECURITY NUMBER CONVERSION STATEMENT**

I, \_\_\_\_\_, do hereby certify that I am a member of the  
**MEMBER'S PRINTED NAME**  
Texas Water Utilities Association and of the \_\_\_\_\_  
**DISTRICT/CHAPTER NAME**  
District or Chapter thereof.

It has come to my attention that my social security number was reported as

\_\_\_\_\_ on the official records submitted to the Association for the year(s) \_\_\_\_\_  
**SSN**

My correct TCEQ license number is \_\_\_\_\_.

**TCEQ LICENSE NUMBER**

Please make the appropriate correction in your records.

Date \_\_\_\_\_ Member Signature \_\_\_\_\_