

# 1 Step 1: The Planning Team

## Introduction: what this step is about

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The first step in developing your Wellhead Protection (WHP) plan is to form a planning team that will guide the project from beginning to end. Later, this same group of people may help put the plan into effect, after it has been approved.

### *Why have a planning team?*



The most successful programs include people representing citizens from across the community, beginning with the earliest stages of planning. Involvement in planning gives participants a sense of ownership in the program. The more people who believe in the program and care about its success, the better the chances are that the plan will be carried out as intended.

In many small communities, the public works department may not have the staff to develop a good WHP plan within a reasonable time frame. A planning team can share the workload, delegating tasks among members according to their skills and access to resources. Team members may also be able to recruit new volunteers and obtain resources for meeting additional needs as they arise.

Many agencies, organizations and individuals are already involved to some degree in water quality protection. Although the primary agency is the Wellhead Protection Program Office of the Public Water Supply (PWS) Section, NC Division of Environmental Health, others may also have information that is important to your community. Inviting representatives from a broad range of these related state and local groups to participate in developing your WHP plan will help to coordinate resources and enhance the success of your program in the long run.

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Planning team members can be vital in gaining public support for the WHP effort. They will provide opinions that represent the citizens you serve. They can also help with educational efforts to reach the whole community throughout your WHP planning process.

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Many other people in your community have a role to play in water quality protection, too. Some of them should be included on your planning team. It makes sense to include those persons who will be involved in implementing the plan, such as municipal utility employees. Also, those persons who will be affected by the plan, such as local emergency responders, should contribute their perspectives.

*The state requires public participation for the WHP plan to be approved.* This requirement is in the best interest of your community. People who are directly and locally involved can provide the best guidance for the development of the plan. It is important to take advantage of the knowledge and expertise that exist within your community. Also, bringing in representatives from different parts of the community provides the most complete community perspective. It will also be easier to deliver information to the public and get community support when representatives of various groups are already active in the process. This can determine whether the public “buys in” to the plan; whether as many groups as possible accept the plan and its goals; and whether the public cooperates with the plan’s management strategies.

## Assistance is available

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*One manager of a very small community put it this way: "I would suggest that people contact the Rural Water Association. They're excellent people to work with, and they made a big difference for us." Another added, "Neither could have done this alone: we needed their expertise for some of the technical parts, and they can't do it without the knowledge of the local people."*

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This document contains the instructions your planning team needs to prepare a good WHP plan. There is no requirement for an engineer or other consultant to be involved. However, since many communities do not have experience with this kind of project, many have found it helpful to talk with a professional consultant. The North Carolina Rural Water Association (NCRWA) provides consultants at no charge to PWS systems. Rural Water Association consultants are experienced in all aspects of developing and preparing a WHP plan. They can help with activities described in the following chapters that may be unfamiliar, such as determining the area around the well that needs to be protected and searching electronic databases for potential contamination sources. The NCRWA consultant can also recommend management strategies that have been successful for other public water supplies. Your planning team can choose what assistance, if any, you need from NCRWA. The address and telephone number for contacting the NCRWA are in the Resources and References section at the end of this chapter. Private consulting firms also have qualified consultants who can be hired to help develop a WHP plan, but this is usually more expensive. You may wish to contact other public water supplies who already have an approved WHP plan (see the "Resources and References" section), and ask about their experiences with the consultants they used.



# Procedure: what you need to do to complete Step 1 toward your WHP plan

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Identify the organization that will provide leadership and be responsible for the plan. This can be the water utility, town planning board, etc. Then, add other community members to the team. You will need to choose one person to lead the team and stay in contact with the consultant and the PWS Section.

## Forming the planning team

### Represent all stakeholder groups on your planning team

The word “stakeholder” is used to describe anyone who “has a stake in,” or has some interest in, the results of this WHP plan. The membership of your planning team will depend on the number and variety of stakeholder interests in your town. That includes anyone who uses the water for drinking, agriculture, business, or industry. It also includes anyone who plays a role in the operation and administration of the water utility. It is important to identify all stakeholders and include them in planning. If the support of different groups is not obtained in the planning stage, you may meet resistance when you try to implement the recommended strategies. This can result in delays in implementing the plan, as well as loss of confidence in the program.



### How do we identify stakeholders and candidates for the planning team?

Possible committee members could include representatives of the water utility, local officials, farmers, business representatives, members of service organizations, and interested citizens. Examples of the various groups in your community that could be represented on your team are shown in the figure “Community Roles” on page 4. Remember that these are only suggestions to give you ideas; you are the best source of information about people in your own community.

Some users who have not been directly involved in water quality issues in the past may have a strong interest in the water supply, such as a hospital or food processing plant.

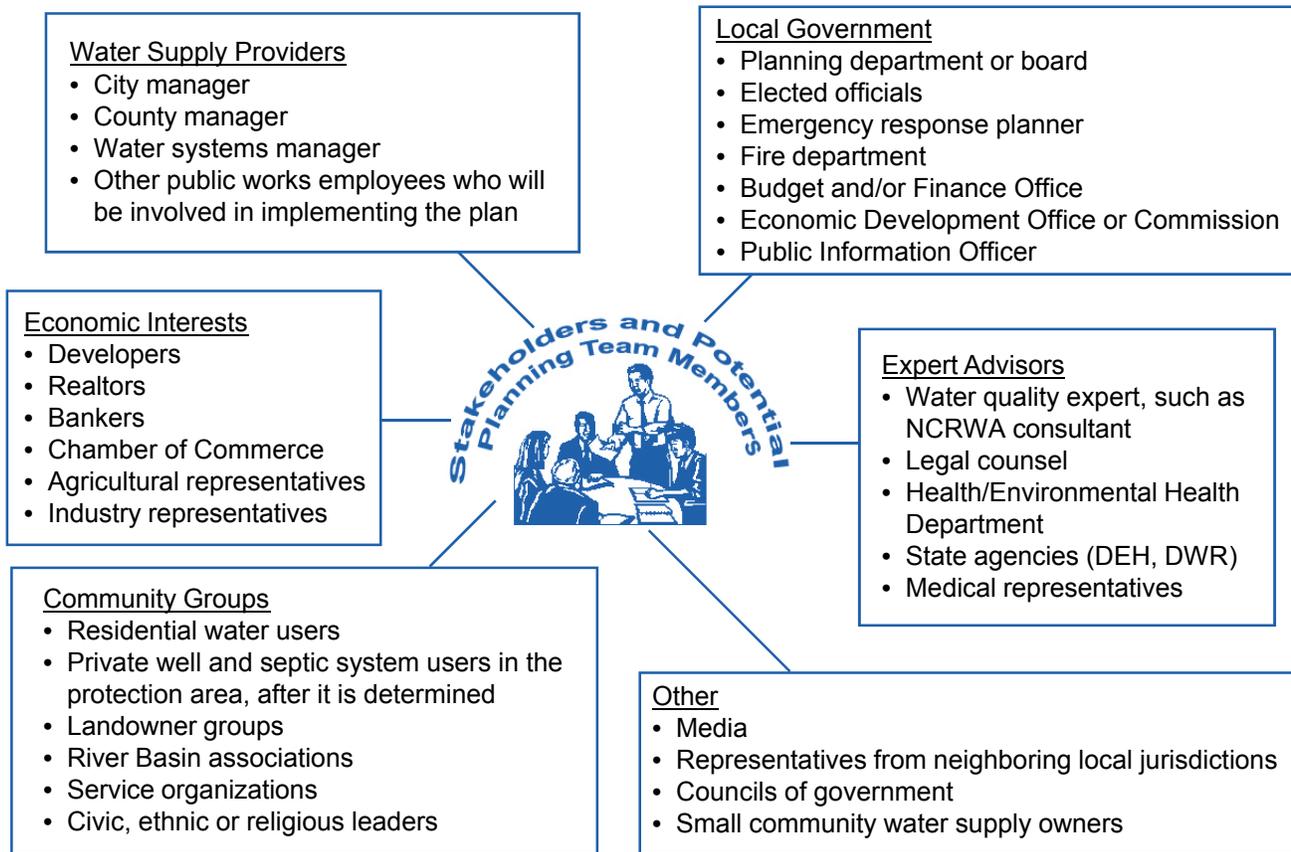
Be sure to recruit opinion leaders from the community. Sometimes these individuals are not in official leadership positions, but they may have a lot of credibility with neighbors and friends. They will help you reach different groups within the community, facilitating their participation or cooperation.

Don’t forget to look beyond your service area, too. In some cases, the utility does not have legal authority over the area that needs to be protected. For example, this would be true if the WHPA extends outside the legal boundaries of your municipality. In these cases, invite representatives of the relevant governing bodies to be on the planning team.

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*Advice from others’ experience that might be considered: “Include your [WHP plan’s] worst enemy on your committee. Find the person who is most likely to fight this later, and include them from the start. If you can sell them on it, everyone else will be easy.”*

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**Community Roles—people to consider for the planning team.**

*"We didn't get much response from the public when we put out announcements about the Wellhead Protection Plan early on. Then, when we started contacting businesses in the Wellhead Protection Area, they didn't understand what it was about or why we were doing it.*

*At first, they assumed we were telling them they couldn't run their business. There was a lot of defensiveness. Once we talked to them and they understood why we were doing this and what we were really doing, everything was fine. Looking back, it would've been better if we invited some people from the community in at the beginning, so they would know why we were doing this, and they could have told their neighbors."*

**What will planning team members do?**

Members of your planning team may serve for the entire planning process; or they may be brought in for a short time, for a specific purpose. When you select planning team members, think in terms of the roles that different organizations and individuals can play. A wide variety of skills can be useful in developing your plan, and then in implementing it later. See "What can planning team members do to help?" on page 5 for examples of activities that team members could carry out. The items listed may also give you ideas about people who would be valuable members of the planning team.

Attachment 1 is an example of a letter that might be used to invite potential planning team members to join.

As you work together, you'll quickly see that this group of stakeholders, the planning team, actually represents a cross section of public opinion. The members will provide direction and insight into the public education and public relations needs in your community.

## What can planning team members do to help?

There are many ways to educate the public and raise the profile of wellhead protection, and many ways that individuals can contribute to the planning process itself. Below are examples of activities that may occur in various stages of the planning process. Not all of them will be appropriate in every community. You may think of others as you clarify your own needs and goals, and others will be determined by the membership of your planning team.

### Information gathering

- Search public records for past ownership and land uses.
- Search computer databases for known contamination incidents.
- Assist with survey for potential contamination sources.
- Interview senior citizens about previous land uses.
- Document current water use, facilities, and sources, including well and pump specifications.
- Document anticipated future water use, facilities, and sources.
- Document current emergency response procedures
- Inventory existing resources for protecting your water supply.
- Contact Cooperative Extension or retail outlets for information about agricultural chemical use.
- Conduct surveys to assess the community's education needs, identified problems, and perceived needs regarding the drinking water supply.

### Education and outreach

- Prepare public service announcements, fliers, fact sheets, doorknob hangers, and other informational materials to reach the public. Prepare wall murals, public bulletin boards, and displays at public libraries (or invite a youth organization to do this).
- Adapt printed materials to target all segments of the community (for example: translating into Spanish, or rewriting for different educational levels).
- Create a web site.
- Provide public speakers who can present a program about WHP and related topics such as underground fuel tanks and septic system maintenance to interested groups.
- Coordinate with town recreation department, Scout troops, 4-H, or schools for art or essay contests, and other educational activities about drinking water protection and conservation.
- Meet with area environmental groups to obtain their support and assistance, and to coordinate efforts.
- Invite the local newspaper to cover planning team meetings. Prepare press releases. Ask the paper to run a series of articles about the source of your drinking water, ways it can be contaminated, and what citizens can do to help.
- Celebrate National Drinking Water Week or Day with a Water Awareness festival. Participate in other local celebrations and festivals, household hazardous waste collection days, or other one-time events that provide an opportunity for publicity.
- Make personal contact, such as one-on-one visits and phone calls.
- Publicly express appreciation for assistance from volunteers and elected officials.

### Resource gathering

- Meet with local business and industry to arrange public/private partnerships, financial assistance, or in-kind contributions such as graphic arts services and printing.
- Recruit volunteers as needed.
- Obtain assistance from groups with common interests, such as a science class at a nearby community college.
- Learn what educational materials are available from your county Cooperative Extension Center and the American Water Works Association, NCRWA, or other organizations with an interest in water quality.
- Order pamphlets from the EPA.
- Obtain support from other municipal departments to coordinate efforts, such as inclusions with monthly bills.

### Administrative tasks

- Schedule and reserve meeting rooms for planning team and public meetings.
- Submit meeting announcements to media and public events calendars.
- Prepare meeting agendas.
- Collect public comments, distribute to team members to provide prompt feedback, and thank senders for their input.
- Prepare regular updates for team members, to keep them informed and motivated.
- Type! A member with computer and word processing skills can prepare your plan for submission to the PWS Section.



## Getting started

Here are some suggestions for your team, based on the experience of others.

### Understand the existing conditions

Before beginning to plan for the future, the planning team should have a clear understanding of the way its water supply system works and the WHP plan process. Even if members consider themselves knowledgeable, bringing everyone to the same starting point can help the team function smoothly later on.

It can be helpful if a member of your local water utility explains your system to the members of the planning team who are not familiar with it. Also, the NC Cooperative Extension service has excellent publications on wells and how they work. It can provide a demonstration to your planning team, using a ground-water model that shows where well water comes from. Contact your local county Cooperative Extension Center for more information.

The team also needs to understand the process they are about to begin: preparing the WHP plan and obtaining approval for it. NCRWA consultants will be glad to meet with you and discuss the WHP program. Representatives of the PWS Section can also provide information.

### Set initial goals and priorities

At an early meeting, the team should determine its initial goals, establish time frames, and define clear objectives for measuring progress. Other goals will not be determined until later, when the team has more information about the problems and needs in the WHPA.

The team will need to decide how to evaluate local needs and establish local protection program goals and priorities. Is your goal only to maintain the quality of your water supply, to keep it from degrading over time? Could your goal be to *improve* the quality of your water, thereby reducing treatment costs? While completing the steps that lead to your WHP plan, you will get a better idea of exactly what you want and need to protect, and what local conditions need to be addressed. Any conflicts with existing goals in other community projects can be identified and resolved. Each community is unique. If the committee agrees on an overall philosophy toward the program and specific protection goals early in the process, this will help guide later decisions, priorities, and commitments.

Clear goals help groups understand and make progress toward water quality protection efforts. When these goals are stated clearly in a way that relates to your community, they can help the general public, elected officials, business, the press, and community leaders understand and support your efforts.

Some groups find it helpful to organize their work in terms of visions, goals, and action items. This approach is described in “Organizing goals” on page 7.

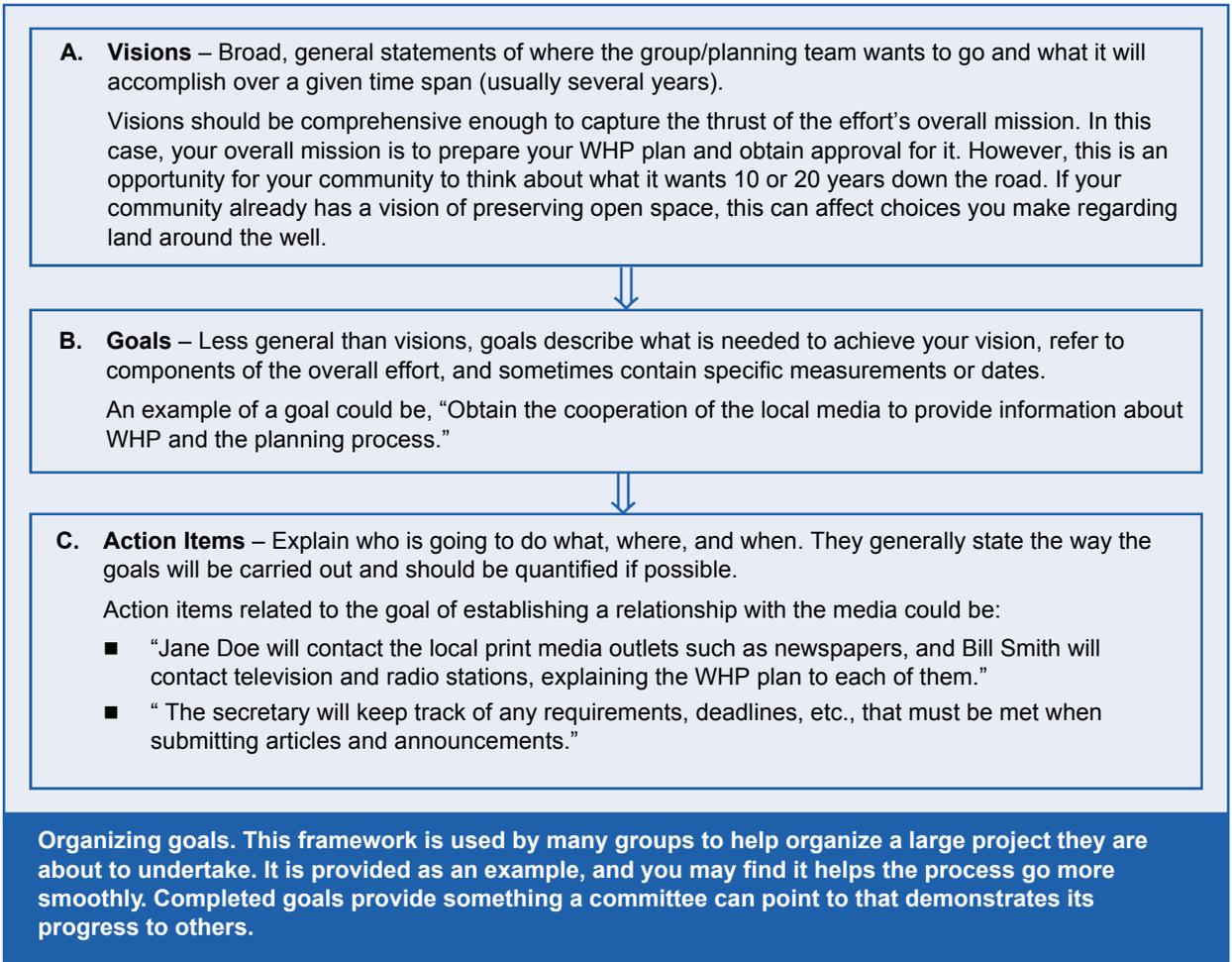
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**A** comment resulting from the experience of one community:

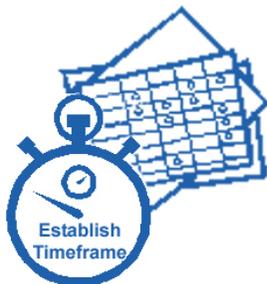
*“Focusing on goals that protect the ground water in a voluntary rather than a regulatory manner has been essential.”*

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**Establish a timeframe for the planning process**



The time each activity takes will depend on the nature of your water supply system, and the goals your planning team sets. Researching the properties and potential contaminant sources in the WHPA usually takes a long time. Other activities, such as public education, take place throughout the planning process, and continue into the future. It may seem difficult to set deadlines at this point, but a schedule helps people complete tasks in a timely manner and keeps the process moving.

The planning team will need to meet regularly throughout the planning process. As you learn more about your WHPA, the planning team can make more decisions about the plan and set additional goals.

***Begin Public Awareness, Education, and Outreach***

Public education and involvement are key to a successful WHP program and are important from the beginning of the planning process through implementation of the final plan.

## Why are public education and involvement so important?

First, ground water is hidden underground, people can't see it, and, for the most part, they don't understand it. When people learn about ground water, they are then able to understand and become concerned about it. As they become more aware of it, they often care more about it.

Second, many myths and mysteries are associated with ground water. Misinformation can lead policy makers to bad decisions.

Third, ground water is frequently taken for granted. It is commonly thought that ground water is always pure and safe. Few people understand the connection between ground water and the land. It takes some time to shift the public's perception toward a more accurate view of ground water. Until this happens, people don't realize the ways they can change their actions to help protect the water.

## Important messages for the public



One very important educational message is that ground water is a relatively inexpensive source of supply *if it is clean*. If ground water can be used for drinking water, this is much less expensive than developing and producing a surface water supply. Treatment and distribution are also typically less costly for a ground water source than for a surface water supply. However, once ground water has become contaminated, it is an extremely expensive resource to clean up (see Resources and References section). Clean up, if possible, can cost millions of dollars. There is also the cost of providing an alternate water supply, even if only for a short time. Protection is much less expensive than remediation. That is a very simple message, but it is often overlooked.

Another very important educational message is explaining how the public can help to keep its drinking water clean. People are often glad to cooperate when they understand where their drinking water comes from, and how their activities can affect it. People are more likely to support your efforts if they understand what you are trying to do and its benefit to their lives.

## Communication goes both ways

Begin building your support early, by carrying the message to all parts of the community through the members of your planning team. This allows you to get feedback during the plan development process, when it is easier to make changes.

## **Monitor progress**

Include in your goals and timetable opportunities to evaluate your progress. Take stock of the different activities involved in the planning process and be sure they are all moving forward.

Let the community know about your accomplishments!

## Resources and References



- PWS Section, Division of Environmental Health, North Carolina Department of Environment and Natural Resources:  
Public Water Supply Section  
Wellhead Protection Program  
1634 Mail Service Center  
Raleigh, North Carolina 27699-1634  
(919) 715-2853
- NC PWS Section website, including link to list of public water supplies with approved plans:  
<http://www.deh.enr.state.nc.us/pws/>
- North Carolina Rural Water Association (NCRWA)  
(336) 731-6963
- North Carolina Cooperative Extension Service  
Contact your local county Extension center, listed in the telephone directory, or go to <http://www.ces.ncsu.edu/> and choose “County Centers” to find yours.
- The EPA has many publications describing different ways that citizens can become involved in ground-water protection. Some of these publications describe citizen activities in other communities.
- The documents below can be ordered through the National Center for Environmental Publications:  
U.S. EPA/NSCEP  
P.O. Box 42419  
Cincinnati, Ohio 45242-0419  
Phone: 800-490-9198  
<http://www.epa.gov.ncepihom/>  
If the document is also available on the internet, the address is provided with its description.

*Protecting Local Ground-Water Supplies through Wellhead Protection.* May 1991. EPA 570/09/91/007. Office of Water, U.S. Environmental Protection Agency. Paper, 18 pages.

### Case studies from other communities

*Case Studies in Wellhead Protection: Ten Examples of Innovative Wellhead Protection Programs.* 1992. EPA 813-R-92-002. Office of Ground Water and Drinking Water, Office of Water, U.S. Environmental Protection Agency. Paper, 38 pages. Online at <http://www.epa.gov/ogwdw/Pubs/02ground.html>

Top 10 Watershed Lessons Learned, EPA840-F-97-001: what works and does not based on past experience. Although these experiences were collected during community surface watershed management efforts, much of this can be applied to WHP as well; online at <http://www.epa.gov/owow/lessons/EPA> information for educators and children; online at <http://www.epa.gov/safewater/kids/>

### Attachments

At the end of this chapter, you will find attachments to help you prepare your plan document.

Remember, the attachments that are labeled “Example” are only here to give you ideas.

- **Attachment 1: Example of an invitation letter**

You do not need to use an invitation letter when you create your Planning Team. However, if you do want to invite people in writing (for example, to create a permanent record documenting your actions), you are welcome to use any or all of the language shown in the example.

- **Attachment 2: Example of a partial plan, showing the portions of the plan that result from this step**

The Example Plan shows you the kind of information that you are expected to include in the plan that you submit for approval. Your final plan will be different from the fictional Town of Clearwater plan that is provided as an example. Your planning team will be composed of the community representatives you choose, and may have more or fewer members than the team shown in the example. You will have your own goals and needs, and you will use the most effective ways to reach the public in your community. Therefore, you are not expected to use all of the exact wording that is shown in the Example. On the other hand, if any of the specific language in the Example also applies to your community, then feel free to use that language in your plan.

Attachments labeled “Template” are pages that are to be filled in and included with the plan you submit. These pages are also available as Microsoft Word files.

- **Attachment 3: Template for cover sheet**

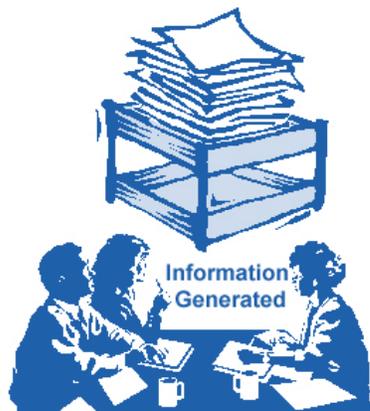
- **Attachment 4: Template for planning team list**

## Products that should result from Step 1, to be included with the final plan:

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When you have finished this step, you should be able to complete the following items:

1. Fill in the following attached templates. These will be part of the plan that you submit to the PWS Section for approval.
  - Cover sheet (Attachment 3), identifying your public water supply and the contact person for the WHP plan
  - Planning team roster (Attachment 4), listing the individuals and the positions they will serve on the team
2. Begin preparing the plan document. It must contain the following information:
  - Statement of initial goals and tactics for achieving them
  - Statement identifying the persons, job position, or group (for example, the Town of Clearwater Board of Commissioners) responsible for implementing the WHP plan
  - Schedule for preparing plan (dates can be filled in prior to submission)
  - Schedule of planning team meetings (dates can be filled in prior to submission)
  - Actions taken or planned for involving the public



## Attachment 1: Sample Planning Team Invitation

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Dear :

The Town is forming a planning committee to prepare our local wellhead protection (WHP) program plan. You have been identified as someone who has an interest in protecting our water supply. We invite you to be a member of our planning team.

We depend on our public water supply system to provide clear, clean drinking water when we turn on the tap. Our community's water supply comes from wells, and many of us have taken for granted that well water is safe. However, in recent years many communities have experienced contamination of the ground water that supplies their well. The State of North Carolina has a *voluntary* local WHP program. The goal of wellhead protection is to prevent contaminants from entering public water supply (PWS) wells by managing the land that supplies water to the wells.

We will be developing our own local WHP program according to local needs using guidelines provided by the state. Members of our community will determine the specific activities that will most effectively protect our own water supply. For this reason, public participation will be just as important to the project as technical assistance.

This is an excellent opportunity for us to protect our public drinking water supply, for our children and for the future of Clearwater.

There is an additional benefit to the taxpayers of Clearwater. The state grant and loan system uses a point system for setting priorities to decide which local governments receive funding for water and wastewater improvement projects. After our local WHP program is approved by the State of North Carolina PWS Section, the Town will be eligible for additional priority points should it apply for state grants and loans in the future.

Meetings will be held throughout the next several months. If you are not interested, but know of another individual who might be, please forward their name to us.

Please return the enclosed form at your earliest convenience. If you have any questions, please contact the town hall at...

**Town of Clearwater**  
1 Main Street  
Clearwater, NC

*Attachment 1, Page 2 (continued)*

Please indicate your level of interest in the local WHP program planning process by checking the appropriate box(es) below:

- I am interested in serving on a WHP planning committee.
- If requested, I will attend the first planning committee meeting on [DATE].
- I am not interested in serving on an advisory committee, but would like to remain on the mailing list to receive information pertaining to the local WHP program planning process, such as announcements of public meetings and proposed plans.
- Please remove my name from the mailing list.

Please provide the following information:

Name: \_\_\_\_\_

Organization Affiliation/Representation: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

Phone Number: \_\_\_\_\_

Fax Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

Please submit this form by [DATE]

## Attachment 2. Example of Step 1 of a WHP Plan

# WELLHEAD PROTECTION PLAN

## TOWN OF CLEARWATER

### in WAKE COUNTY

PWS ID #99-99-999

Prepared: June 1, 2000

Revised: September 1, 2000

Contact: John J. Doe, Public Works Director  
101 Commercial St.  
Clearwater, NC, 27999

Phone: 919-555-7000

Fax: 919-555-7010

## Introduction

After discussions with the North Carolina Rural Water Association (NCRWA), the Town of Clearwater decided to proceed with the development of a local Wellhead Protection (WHP) program by developing a WHP plan. The NCRWA Consultant has agreed to provide technical assistance throughout each of the seven steps of the plan. The Town of Clearwater is embracing this voluntary program because of the benefits to its citizens, both now and into the future.

## Planning Team

Municipal employees whose positions are relevant to the WHP plan and its preparation have been assigned to the planning team or have volunteered to serve on it. Invitation letters were sent to ten other members of the community who were believed to have an interest in water quality or whose contribution to the planning process was desired. Three people who responded were added to the team.

The following persons were selected to serve on the local WHP program planning team for the Town of Clearwater:

<b>Name</b>	<b>Position or group being represented</b>
John J. Doe	Town Manager
(name)	Water Plant Superintendent
(name)	Water Plant Operator
(name)	Special Projects Coordinator
(name)	Mayor
(name)	Town Alderman
(name)	Fire & Rescue Chief
(name)	Bi-county health department Environmental Health Sanitarian
(name)	Chamber of Commerce
(name)	Interfaith Housing Council
(name)	Blue River Council of Governments
(name)	Local well driller
NCRWA Consultant's Name	NCRWA

## Responsibilities for the WHP Plan

The Clearwater Board of Aldermen will be responsible for preparing, implementing, and updating the WHP plan. John J. Doe, Public Works Director, is chair of the planning team and will be responsible for communications with the PWS Section. [Alternate language: The Consultant will prepare the document presented to the PWS Section]

## Needs and Goals

Long-term goals and visions established by the WHP planning team include:

- Safe drinking water for Clearwater
- Adequate supply of water
- Thorough survey of potential contamination sources
- Public education, directed toward various segments of the population
- Approval of the completed WHP plan by the PWS Section of North Carolina's Department of Environment and Natural Resources (NCDENR)
- Review and update the WHP plan on a regular basis after approval by the PWS Section

Problems and needs identified by the WHP planning team include:

- Lack of information about a contingency plan
- Lack of management strategies for potential sources of contamination
- New well for current and future demands
- Upgrade of filters at water plant
- Improvements to existing above ground water tanks
- Improvements to distribution lines and replacement of smallest lines
- Expansion of distribution system to areas requesting city water
- Lack of information about existing contamination threats

Additional actions needed to carry out the planning process were identified and assigned to planning team members. These include identifying volunteer groups to help in later stages of the plan, obtaining in-kind donations from a local print shop for educational materials, and reserving rooms for planning team and public meetings. Details can be found in the minutes of the planning team meetings, which are on file at the Clearwater Town Hall.

[Name], the Town of Clearwater Special Projects Coordinator, prepared a press release which was delivered to the Clearwater Tribune (published August 11, 2000), the local radio station, and the three television stations that serve the area. [Name], the Agricultural Extension Agent, met with school administrators to discuss ways that ground-water education could be incorporated into lessons during this time. [Name] prepared a pamphlet, based on similar EPA materials, that explained wellhead protection, its value to Clearwater residents, and ways that all citizens can help. Audience members at the community presentations received copies of these pamphlets. Citizens were informed that the public would be given opportunities for input to the final plan, and were invited to submit written comments and reactions for consideration at the initial planning meeting.

## Time Frame

The planning team agreed that there would be opportunities for public input at the following stages of the planning process:

- Shortly after the first planning team meeting, to explain wellhead protection and encourage public involvement.
- After the completion of the contaminant survey, to discuss risks and priorities.
- When the first draft of management strategies is prepared, to obtain public feedback and support.

The first and third opportunities for input were in the format of a series of presentations at club and other local group functions. The format for the second was a single public meeting.

Planning team meetings were held to discuss each step of the process as it occurred, with additional meetings scheduled as needed. The dates were {fill in when known}.

**The following two pages are Attachments 3 and 4,  
the Cover Page and Planning Team Roster.**

# WELLHEAD PROTECTION PLAN

## FOR

\_\_\_\_\_

PWS name

in \_\_\_\_\_ County

PWS ID # \_\_\_\_\_

Date prepared \_\_\_\_\_

[Add Date revised, if necessary \_\_\_\_\_]

Contact Name: \_\_\_\_\_

Position: \_\_\_\_\_

Phone: \_\_\_\_\_

Fax: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

Street or PO box

\_\_\_\_\_, North Carolina \_\_\_\_\_

City

Zip



