

# Effective Utility Management Workshop

University of Wisconsin-Oshkosh Alumni Welcome and Conference Center  
 625 Pearl Avenue, Oshkosh, WI 54901  
 Thursday, July 26, 2018

## EUM Workshop Objectives

- Describe ways that the EUM Primer can be used.
- Conduct the EUM Self-Assessment and review other key implementation steps, including identifying effective practices and measures.
- Equip participants to implement EUM at their utility based on the assessment done at the workshop.
- Create an opportunity to learn from utility peers about their challenges, successes, and plans for improving in the future.

**\*\*Rob Greenwood from Ross Strategic will be the primary speaker and leading the workshop\*\***

8:30	<b>Sign-in/Registration</b>
9:00	<b>Introductions and Workshop Objectives</b>
9:15	<b>Session 1: Presentation – Overview of EUM</b> <ul style="list-style-type: none"> <li>• Background</li> <li>• Description of the EUM Attributes and Keys to Management Success</li> </ul>
10:00	<b>Break</b>
10:10	<b>Session 2a: Table Exercise - Utility ‘Self-Assessment’ Exercise</b> <ul style="list-style-type: none"> <li>• Explain Self-Assessment (10 minutes)</li> <li>• Participants Conduct Self-Assessment of Their Own Utility (20 minutes)                             <ul style="list-style-type: none"> <li>○ Step 1: Assess Current Strengths and Areas for Improvement</li> <li>○ Step 2: Rank and Rate Importance of Attributes</li> <li>○ Step 3: Graph Results</li> </ul> </li> <li>• Table Discussion Among Participants About Results (30 minutes)                             <ul style="list-style-type: none"> <li>○ Where is your utility strong? Why?</li> <li>○ Where is there the most room for improvement? Why?</li> <li>○ Why is performance low: technical; financial; and/or managerial capacity?</li> <li>○ What are commonalities and differences among table participants’ achievements, priorities, and challenges?</li> </ul> </li> </ul>
11:10	<b>Session 2b: Plenary Discussion – Self Assessment Results</b> <ul style="list-style-type: none"> <li>• Tables Report Out</li> <li>• Synthesize Results</li> </ul>
11:45	<b>Session 3: Presentation - Utility Implementation Experience</b> <ul style="list-style-type: none"> <li>• EUM Implementation Experiences at Water Sector Utilities (utility case examples)</li> <li>• Moving Toward Sustainability Roadmap – Identification of Effective and Sustainable Practices</li> </ul>

<b>12:15</b>	<b>Lunch Break</b>
<b>1:00</b>	<p><b>Session 4a: Table Exercise – Implementing EUM – Linking Attributes to Practices (Worksheet Part 1)</b></p> <ul style="list-style-type: none"> <li>• Introduction to Table Exercise and Link to Morning Sessions</li> <li>• EUM Attributes – Introduce Structured Exercise, Select Attributes</li> <li>• Step 1: Roadmap Implementation Framework – Review and Identify Practices</li> <li>• Step 2: Table Discussion of Practice Findings <ul style="list-style-type: none"> <li>○ During this exercise, which practices jumped out at you as new opportunities or particularly useful to your system?</li> <li>○ Did you identify any additional or alternative practices in this Attribute area that were not listed in the worksheet? What are these practices and why are they important to include here?</li> </ul> </li> <li>• Step 3: Table Report Out</li> <li>• Step 4: General Discussion of Findings</li> </ul>
<b>2:15</b>	<b>Break</b>
<b>2:30</b>	<p><b>Session 4b: Plenary Discussion – Implementing EUM – Linking Attributes to Measures (Worksheet Part 2)</b></p> <ul style="list-style-type: none"> <li>• Step 1: EUM Primer Measures Appendix – Review and Identify Measures</li> <li>• Step 2: Table Report Out</li> <li>• Step 3: General Discussion of Findings</li> </ul>
<b>3:15</b>	<b>Session 5a: Presentation – Implementation Resources</b>
<b>3:30</b>	<p><b>Session 5b: Table Exercise - Implementing EUM at Your Utility</b></p> <ul style="list-style-type: none"> <li>• Discussion Questions <ul style="list-style-type: none"> <li>○ How do you anticipate EUM can work with and enhance your current planning and management practices?</li> <li>○ What internal team (or other) process could you envision for conducting the EUM assessment?</li> <li>○ How might you connect with other utilities to advance performance at your utility?</li> <li>○ What steps can you take to introduce EUM at your own utility after this workshop?</li> </ul> </li> <li>• Table Report Out of Implementation Approaches Discussed</li> </ul>
<b>4:15</b>	<p><b>Session 6: Feedback Session</b></p> <ul style="list-style-type: none"> <li>• General Discussion: What are the key strengths and areas for improvement of the workshop approach and format?</li> <li>• Participants Complete Evaluation Form</li> <li>• Collect Evaluation Forms</li> </ul>
<b>4:30</b>	<b>Adjourn</b>