

# NEXT STEPS FOR FACILITATORS

Now that you have completed the Sustainable Management of Rural and Small Systems Workshop, there are a number of important follow-up steps for both you and the utilities attending the workshop to undertake. The following activities are designed to help you as you work with these utilities through the follow-up process.

## At the end of the workshop:

- ✓ **Review the Next Steps For Your utility** timeline that corresponds to this timeline
- ✓ **Do a materials check:** Double check that all participants have a copy of the Self Assessment Worksheet and the Improvement Plan Worksheet and let them know where they can find these online
- ✓ **Share contact information:** Make sure you provide participants with your contact information, and make sure to get the contact information for at least one participant from each utility (this should also be collected as a part of workshop registration)

Approximate Timeframe	Activity
1-4 weeks after the workshop	<p><b><u>Recommended Utility Activities</u></b></p> <p>Hold a follow-up meeting within the utility – include any utility managers or leaders from all departments at the utility, and/or other staff members. Utilities can:</p> <ul style="list-style-type: none"><li>✓ Discuss results of Self Assessment activity</li><li>✓ As necessary, run the Self Assessment activity with them to supplement the work that was accomplished during the workshop – they can make use of the team exercise Workshop in A Box materials available from USDA and EPA</li><li>✓ Identify Priority Management Areas to focus improvement activities on</li><li>✓ Complete the preliminary Utility Improvement Plan Worksheet</li></ul> <p><b><u>Technical Assistance Provider Role</u></b></p> <p>Contact the utility 15-20 days after the workshop:</p> <ul style="list-style-type: none"><li>✓ Find out if they have any questions on the workshop materials</li><li>✓ Offer the help them complete their Improvement Plan Worksheet if they have not already done so</li><li>✓ Ask about any additional technical assistance needs they might have</li></ul>
4-8 weeks after the workshop	<p><b><u>Recommended Utility Activities</u></b></p> <p><i>If they have not already been involved in the process up to this point – Reach out to utility board members and/or community leaders (e.g., city manager or mayor) whose roles relate to or influence utility operations.</i></p> <ul style="list-style-type: none"><li>✓ Explain the Workshop content and the results of the Self Assessment that was completed at the workshop</li><li>✓ If appropriate, run the Self Assessment activity with them to supplement the work that was accomplished during the workshop – they can make use of the</li></ul>

- team exercise Workshop in A Box materials available from USDA and EPA
- ✓ Share preliminary Utility Improvement Plan
- ✓ Modify Utility Improvement Plan based on feedback, as needed
- ✓ Gain any necessary approval needed to move forward with Utility Improvement Plan

**Technical Assistance Provider Role**

Contact the utility again 20-25 days after your initial check-in:

- ✓ As necessary, help them complete their Improvement Plan, and assist them in reaching out to board members, etc.
- ✓ Offer to make a site visit or provide other technical assistance necessary to implement the Improvement Plan

8-12 weeks after the workshop

**Recommended Utility Activities**

Begin to implement the Utility Improvement Plan, based on timelines identified in Utility Improvement Plan worksheet.

12-15 weeks after the workshop

**Recommended Utility Activities**

Hold an internal follow-up meeting to assess progress on Utility Improvement Plan activities and adjust plan as needed.

**Technical Assistance Provider Role**

Contact the utility approximately 30 days after your second check in (or sooner if you have determined on an individual basis that it is needed, e.g., during a site visit):

- ✓ Ask how the implementation of their Improvement Plan is progressing
- ✓ Ask if they need any technical assistance to implement the Improvement Plan
- ✓ Determine if a site visit is needed

Ongoing, As Needed

**Recommended Utility Activities**

- ✓ Hold periodic meetings to assess Utility Improvement Plan activities
- ✓ Revisit the Self Assessment results to identify new or emerging Priority Management Areas
- ✓ Complete new Improvement Plan Worksheets as additional Priority Management Areas are identified
- ✓ Share success stories and challenges with technical assistance providers (e.g., workshop facilitators, hosting organizations)

**Technical Assistance Provider Role**

- ✓ Follow up with utilities on an ongoing basis, as you determine necessary based on your initial follow-ups, to provide guidance on updating Improvement Plans and revisiting the Self Assessment activity
- ✓ Collect success stories (or challenges) and workshop feedback to help improve your own workshop approach and to share with EPA and USDA