template 3a: Multi-System Workshop Agenda

DATE

**LOCATION**

**START TIME – END TIME**

**FACILITATOR:**

**SPEAKER(S):**

**Time Session**

00:00 Sign-in/Registration (30 minutes)

00:00 Introductions and Workshop Objectives (15 minutes)

00:00 Session 1: Overview of Key Management Areas – Presentation (30 minutes)

00:00 Session 2: Utility ‘Self Assessment’ Exercise (45 minutes)

* Explain “Sustainable Management Self Assessment” (5 minutes)
* Participants Conduct Self Assessment (30 minutes)
  + Rate utility achievements and rank management priorities
  + Plot results: achievements vs. priorities
* Table Discussion Among Participants About Results (25 minutes)
  + Where is your utility strong? Why?
  + Where is there the most room for improvement? Why?
  + What are your areas of focus?
    - Why are they a priority?
    - Why is performance low?
      * Technical capacity?
      * Financial capacity?
      * Managerial capacity?
  + What are the commonalities and differences among table participants?

00:00 Break (5 minutes)

00:00 Session 3: Plenary Discussion – Self Assessment Results (1 hour)

* Tables Report Out (30 minutes)
* Synthesize Results (30 minutes)

00:00 Working Lunch (Optional – 1 hour)

00:00 Session 4: Table Exercise – Improving Outcomes (45 minutes)

* Each table completes an improvement worksheet for one low achievement/high priority management area.
* Discussion Questions:
  + What will constitute “high achievement” in this management area?
  + What changes will the utility need to make to improve performance?
  + How could you track your performance progress?
  + What will be the biggest challenges to performance improvement?

00:00 Session 5a: Plenary Discussion – Practices, Tools, and Measures Results (30 minutes)

* Tables Report Out
* General Discussion of Findings

**00:00 Break (15 minutes)**

00:00 Session 5b: Plenary Discussion – Practices Results (45 minutes)

* Synthesis of Table Discussion Results
* Local Assistance Available in Key Management Areas
* Presentation of Additional Tips, Tools, and Measurement (pre-prepared for use at workshops)
* Reflections: Key Lessons Learned and Near Term Steps

00:00 Session 6: Creating an Action Plan (1 hour)

* Workshop participants complete a Sustainable Management Action Plan Worksheet
* Facilitator reviews “Suggested Next Steps for Your Utility” handout

00:00 Session 7: Feedback Session (30 minutes)

* Participants Complete Evaluation Form
  + Are these the right management areas, and how to improve?
  + Is self assessment useful, and how to improve?
  + Are tools and tips useful, and how to improve?
  + Are measures useful, and how to improve?
  + Overall rating of format, flow, presenters, etc.
* Collect Evaluation Forms

00:00 Adjourn