



## **CEU Application – Agenda, Program and Instructor Information, and Relevance to Wastewater Professionals**

**2023 Effective Utility Management Workshop  
City of Redmond Public Works Conference Room  
243 E. Antler Ave., Redmond, OR 97756**

**Monday, July 24, 2023: 10:00 am to 4:30 pm**

CEUs requested: This webinar conference contains 6 hours of eligible content, equating to .6. CEUs being requested.

This document includes the information required to demonstrate eligibility for general CEUs, including: 1) the educational need for the program provided; 2) the learning outcome for attendees; 3) an outline of the course content; 4) the qualifications of the instructors; 5) the time schedule; and 6) the method of tracking on-line attendance for the duration of the workshops.

### **Relevance to Wastewater Professionals, Educational Need, and Learning Goals:**

The Effective Utility Management Workshop was developed by the US EPA in partnership with other national water/wastewater/public works organizations to educate wastewater/water infrastructure managers on implementation of the Effective Utility Management (EUM) Primer. This workshop uses the [EUM Primer](#) and the associated [Roadmap](#) resources to support wastewater/water utilities in assessing current and future infrastructure/utility management challenges and developing solutions and strategies to move toward sustainable management of their operations and infrastructure. These workshops are not only relevant to wastewater utility professionals, they are specifically tailored to them. Each year the EPA delivers a handful of these workshops around the country, hosted by organizations like the Oregon Association of Clean Water Agencies (ACWA). Oregon ACWA is fortunate to have been chosen as a host for this workshop in 2023. This workshop fulfills the educational needs of wastewater facilities that are faced with aging infrastructure, growing water quality challenges and regulatory requirements, a growing population, and utility rate affordability concerns. Through this workshop, the attendees are provided with the tools and processes they need to assess their priority utility management issues and develop sustainable, effective, and efficient paths forward.

The learning goals for the participants in the workshop will be to:

- Understand the elements of the EUM resources and how use them to conduct utility assessment and strategic planning;
- Conduct the EUM Self-Assessment, the results from which participants can use to spark and support further dialog within their utility about areas for potential improvement and further use of the EUM framework;
- Equip the participants to create an internal team and utilize the EUM framework to assess utility conditions and create a plan for improving them; and
- Learn from utility peers about their challenges, successes, and plans for improving in the future.

Utilities will learn how to make improvements in the Ten Attributes and Five Keys to Management Success at a pace consistent with their most pressing challenges. (Please also see the workshop agenda flyer included in these application materials.)

### **Method of Tracking Attendance:**

All attendees wishing CEUs will be required to sign a CEU registration and certification roster for the sessions, which will be attended by the workshop logistical coordinator. ACWA will monitor attendance and the roster and will sign and maintain the roster as required.

**Outline of Course Content and Schedule:**



# Effective Utility Management Oregon Multi-Utility Workshop Agenda

**July 24, 2023**  
**10:00am – 4:30pm**

City of Redmond Public Works  
243 E Antler Ave.  
Redmond, OR 97756

## Segment 1: Welcome and Introductory Session

(20 min)

- Welcome
- Introduction, Jim Horne USEPA
- Oregon WEA Speaker
- Workshop Objectives
- Participant Introductions

## Segment 2: EUM Workshop Overview

(30 min)

- Workshop Schedule
- Introduction to EUM
- Description of the EUM Attributes and Keys to Management Success

## Segment 3a: Utility 'Self-Assessment'

(30 min)

- Overview of Self-Assessment
- **Exercise - Participants Conduct Self-Assessment of Their Own Utility**

**Break (~10 min)**

## Segment 3b: 'Self-Assessment' Group Exercise

(40 min)

### 'Self-Assessment' Chart Walk-through

### Exercise - Discussion Among Participants About Results

- What are your utility's highest rated attributes (best performance)?
- Which high ranking attributes (1-5 rankings) are most important for your utility to focus on improving?
- Time permitting, what are a couple commonalities and differences among table participants' attribute rankings and ratings?

## Segment 3c: 'Self-Assessment' Group Report Out

(35 min)

- Breakout Group Report Out
- Identifying Top Two Attribute Areas
- Attendees Select Their Attribute Areas for Afternoon

<b>Working Lunch</b>	
<b>Segment 4a: Implementing EUM – Identifying Effective Practices</b>	
<b>(20 min)</b>	<ul style="list-style-type: none"> <li>Roadmap Implementation Framework – Review and Identify Practices</li> <li>Introduction to Effective Practices Exercise</li> </ul>
<b>Segment 4b: Implementing EUM – Identifying Effective Practices</b>	
<b>(30 min)</b>	<b>Exercise – Participants Identify Effective Practices</b> <ul style="list-style-type: none"> <li>Complete Exercise</li> </ul>
<b>(45 min)</b>	<b>Exercise - Discussion of Effective Practice Findings</b> <ul style="list-style-type: none"> <li>During this exercise, which practices jumped out at you as new opportunities or useful for your utility?</li> <li>Did you identify any <b>additional or alternative practices</b> 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>
<b>Segment 4c: Implementing EUM – Effective Practices Breakout Room Report Out</b>	
<b>(30 min)</b>	<ul style="list-style-type: none"> <li>Breakout Group Report Out</li> <li>Plenary Discussion of Findings</li> </ul>
<b>Break (~10 Minutes)</b>	
<b>Segment 5: Developing an Action Plan</b>	
<b>(50 min)</b>	<ul style="list-style-type: none"> <li>Linking Attributes to Measures</li> <li>Benchmarking Resources</li> <li>Group Discussion on Measures</li> <li>EUM Dashboard Example</li> </ul>
<b>Segment 6: Bringing EUM to Your Utility</b>	
<b>(35 min)</b>	<ul style="list-style-type: none"> <li>Example Start-up Plan</li> <li>Action Plan Break-out Group Discussion (<i>No Report Out</i>)</li> </ul>
<b>Segment 7: Feedback Session</b>	
<b>(10 min)</b>	<ul style="list-style-type: none"> <li>Real-time Feedback - "Open Mic"</li> <li>Participants Complete Evaluation Form</li> </ul>
<b>Segment 8: Wrap-up</b>	
<b>(5 min)</b>	<ul style="list-style-type: none"> <li>What We Covered in Workshop</li> <li>Additional Resources (<a href="http://WaterEum.org">WaterEum.org</a>)</li> <li>Closing Remarks: Oregon WEA Speaker</li> </ul>
<b>Adjourn</b>	

## **Qualifications of Instructors:**

The EUM Workshop will be taught and facilitated by a team of experienced instructors, including: Jim Horne, US EPA Office of Wastewater Management; Jim Ginley, Jim Ginley Consulting, LLC; and Darin Thomas, Vice President of Raftelis. This team provides these workshops all over the country for the EPA. The instructor qualifications are provided below.

### **Jim Ginley**

Jim Ginley is an independent consultant with more than 32 years of experience in the municipal water sector, including more than 16 years on the staff of the American Water Works Association (AWWA), more than 16 years as a utility management consultant. Ginley specializes in strategic planning, benchmarking, organizational assessments, workshop and session facilitation, and training.

At AWWA, Ginley managed the AWWA QualServe program, the Utility Benchmarking effort, and was part of the original team that built the EUM framework in 2006 and 2007. Since EUM was “relaunched” in 2017, Ginley has served as a workshop instructor, both for AWWA and US EPA, in more than a dozen locations across the US. Ginley is a long-time member of both AWWA and WEF and serves on the AWWA Strategic Management Practices Committee and the WEF Utility Management Committee. He also developed and co-chairs the Rocky Mountain AWWA/WEA Utility Management Committee.

### **Darin Thomas**

Darin Thomas is a seasoned utility industry leader and proven innovator. For over 35 years he has worked with large and small utilities across the Country, planning for, and implementing, a myriad of projects, programs, and initiatives focused on elevating organizational performance.

Mr. Thomas has a passion for utility organizational and leadership excellence and has spent the past 14 years working with utility organizations to elevate performance leveraging the Effective Utility Management (EUM) Framework. He is a seasoned workshop facilitator engaging with water sector organizations in the areas of strategic planning, organizational and operational assessments, and performance benchmarking.

Darin is a long-time member of AWWA and NCAWWA/WEA (One Water). He has a B.S Degree in Mechanical Engineering, from Michigan Technological University, is a Blackbelt recipient from the City of Denver Colorado’s Peak Academy and is a certified PROSCI Change Management Practitioner.

### **Jim Horne**

Jim Horne has been with the Office of Water at EPA since 1988 and with the Office of Wastewater Management since 1991. During that time, he has concentrated on educating and assisting public entities, primarily water and wastewater utilities, on the value of using various approaches and adoption of best practices to sustainably manage their operations.

Some of the major efforts Jim has led for EPA include: completing an historic agreement between EPA and six national water sector associations to promote effective utility management based on a series of Attributes of Effectively Managed Utilities and Keys to Management Success (EUM) and another project to help managers of rural and small utilities use a similar framework in partnership with the U.S. Department of Agriculture; and developing a “roadmap” of sustainable and effective practices for water and wastewater utilities based on the EUM Attributes and Keys; representing EPA on the working group that developed the Utility of the Future is Now recognition program for wastewater utilities.

Jim led the effort to host a National Water Workforce Convening involving experts from across the water sector in 2018. More recently, he was instrumental in completing EPA’s National Water Workforce Initiative as well as a series of case studies and webinars highlighting ways in which water sector utilities are strategically addressing their workforce challenges. He received a bachelor’s degree from the University of Texas at Austin, and an MPA degree from the University of Washington.