template 3B: Team Exercise Workshop Agenda

DATE

**LOCATION**

**START TIME – END TIME**

**FACILITATOR:**

**SPEAKER(S):**

**Time Session**

00:00 Introductions and Team Objectives (15 minutes)

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

00:00 Break (15 minutes)

00:00 Session 2: Utility ‘Self-Assessment’ Exercise (90 minutes)

* Team leader explains ‘Self-Assessment’ (5 minutes)
* Team members conduct Self-Assessment (25 minutes)
  + Rate utility achievements and rank by priority
  + Plot results: achievements vs. priorities
* Compile and portray team member assessments – team leader
* Discussion Among team members (1 hour)
  + Where are the commonalities and differences among team members? Why?
  + Where is our 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?

00:00 Working Lunch (Optional – 1 hour)

00:00 Session 3: Improving Outcomes (1 hour)

* Assign 2-3 team members to complete an improvement worksheet for one low achievement/high priority management area.
* Team Member Questions:
  + What will constitute “high achievement” in this management area?
  + What changes will we need to make to improve performance?
  + How could we track performance progress?
  + What will be our biggest challenges to performance improvement?
* Team members report findings
* Full team discussion – refine and improve findings

00:00 Break (15 minutes)

00:00 Session 4: Resources and Additional Improvement Ideas (1 hour)

* Presentation of additional tips, tools, and measurement – team leader
* Team reflections: further ideas for improving performance and resources of interest

00:00 Session 5: Creating an Action Plan (30 minutes)

* Introduce the Sustainable Management Action Plan Worksheet
* Select management areas for focused, near-term attention
* Make assignments for management area leads to prepare and identify improvement resources

00:00 Adjourn