

Utility Leadership

Workshop Report



PRESENTED BY
National Water Research Institute

IN COOPERATION WITH
Malcolm Pirnie, Inc.
University of Southern California
University of South Florida

Kellogg West Conference Center & Lodge
California State Polytechnic University
Pomona, California

October 24-26, 1999

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By

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FOREWORD

The Nominal Group Technique has been used by the National Water Research Institute (NWRI) in a workshop format since 1992. In previous workshops, the subjects have focused on many of the most important technical issues confronting water utilities across the nation. The workshop documented in this report, however, is the first effort by NWRI to examine organizational issues associated with utility leadership. This topic is of great interest to the Center for Excellence in Utility Leadership, one of three centers under the NWRI National Centers Program. The other two centers are the Center for Water Treatment Technology and Center for Groundwater Restoration and Protection.

The premise under which this workshop was planned is that public expectation of both water and wastewater utilities across the country is changing. Expectations focus on public health, environmental protection, and cost efficiencies. The utility of the next decade will be substantially different from the utility of 1980, or even 1990. The model of a centralized, isolated bastion of expertise will give way to a more open and sophisticated, lean and flexible, customer-oriented service organization. This will require, we believe, a new style of leadership, one less technically oriented but more business minded, willing to embrace new, often bold, philosophies and directions. Existing leadership is, in most cases, ill prepared for these new directions.

This workshop brought together a group of recognized leaders from throughout the nation to focus on a single question: *What are the most important strategic and operational leadership skills needed throughout utilities in the 21st Century?* Their responses are documented in this report.

The success of any activity is due in part to the participants. However, those in the “back-room” are again to be congratulated for providing the glue to make the workshop function smoothly. In particular, special thanks are extended to Patricia Linsky, Editor; Lucy Segura, Workshop Coordinator; Jose Pezely, Graphics Illustration; and Stephen Lyon, Graphics Assistant.

NWRI wishes to especially thank Garret P. Westerhoff, President, Malcolm Pirnie, Inc., who, as a member of the NWRI Research Advisory Board, has provided the continuous and enthusiastic encouragement to examine the myriad of issues associated with leadership as an important and vital need of the industry.

RONALD B. LINSKY
Executive Director
National Water Research Institute
Workshop Secretary

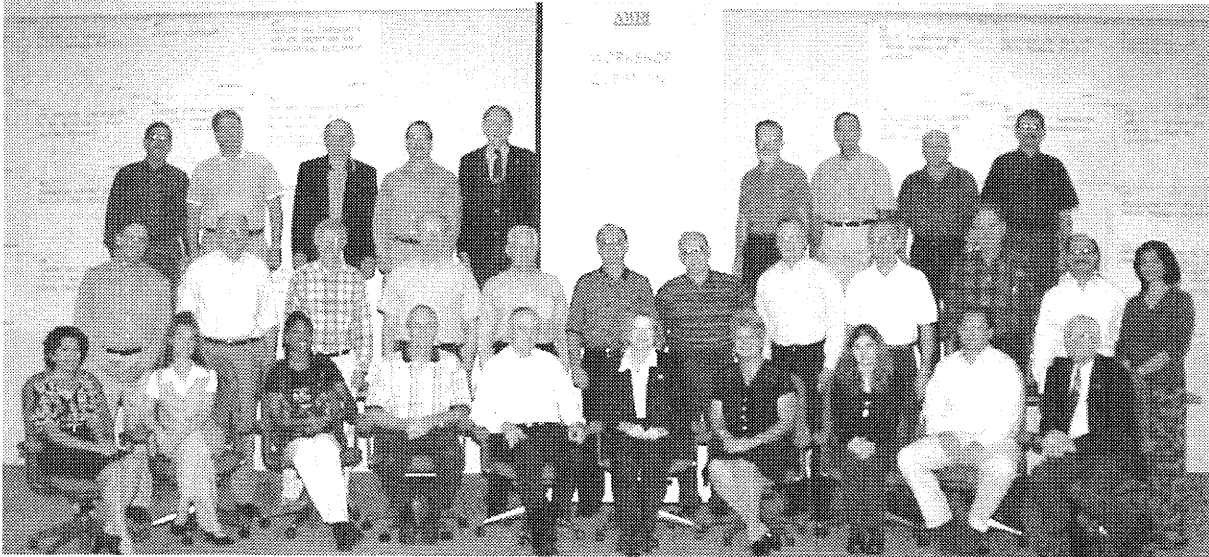
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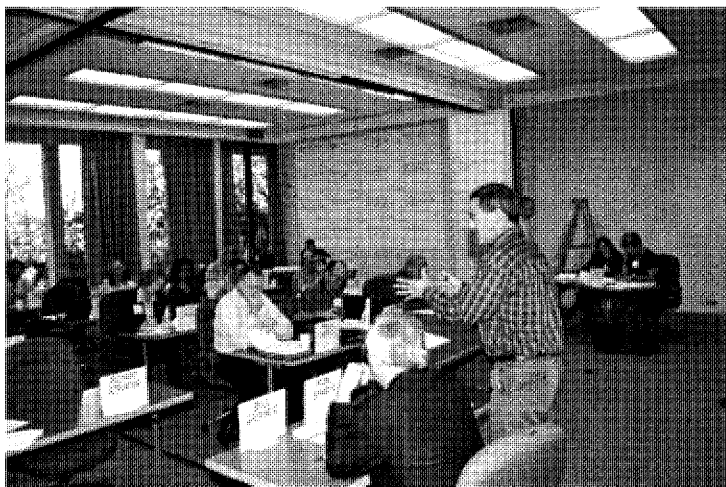
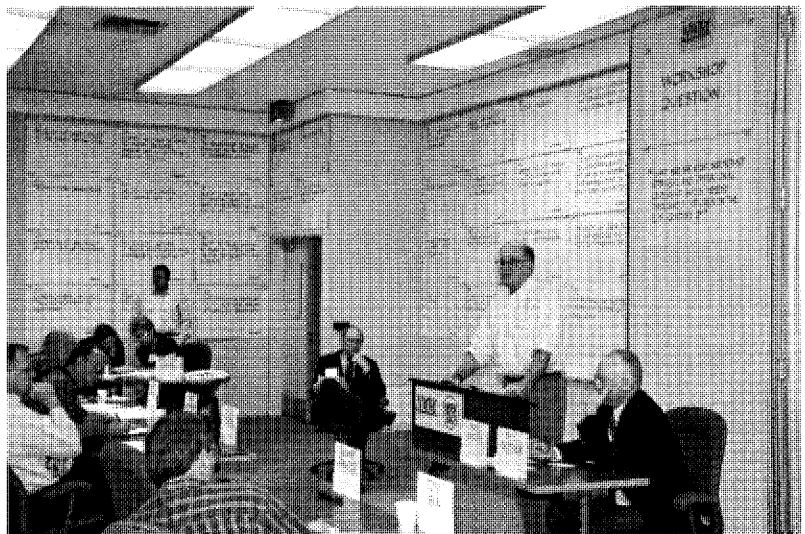
PARTICIPANTS



Top Row: Tom Arn, Ron Young, Jim Nemke, Jerry Knippel, Bill Gaither (Chair), Larry Morris, Darryl Miller, Ed Cummings, Steve Lyon (Graphics Assistant/Technical Information)

Middle Row: Bill Knecht, Doug Wheeler, Bob Ooten, Paul Thormodsgard, Jerry Maxwell, Bob Brotherton, Bob Carnahan, Brian Brady, Bill Mills, Dan Flanagan, Peter Dobrolski, Renu Khator

Seated: Lucy Segura (Meeting Coordinator and Lead Word Processor), Kathy McCallum (Word Processor), Schkeena Lathon (Word Processor), Mick Noland, Joe Pezely (Graphics), Cynthia Jones, Patricia Linsky (Editor), Gina Melin, David Williams, Ron Linsky (Secretary)

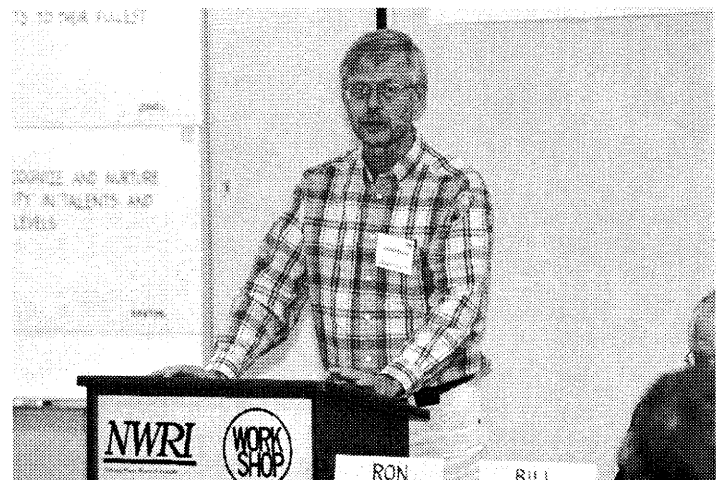


Working Groups' Reports

INTRODUCTION

Summary Descriptions of Highest Priority Strategic and Operational Leadership Skill Sets Needed Throughout Utilities in the 21st Century

The ten working groups prepared the following summary descriptions of priority leadership skills. Each of these ten descriptions represent the first step in consolidating and focusing the highest priority leadership skill sets originated by the participants in the Nominal Group Technique (NGT) workshop presented in Part 2 of this report. Each working group report recommends individuals or organizations that could be members of follow-on Task Forces that would be appointed when and if the process of developing action moves forward. Also, written comment and suggestions by other participants follow some of the working group reports.



PRIORITY 1

Twenty-First Century Leadership Must Develop a Visionary Plan with a Global Perspective That Empowers All Stakeholders

WORKING GROUP MEMBERS:

Carnahan, Jones, and Ooten

Skill description:

In order to develop a visionary plan, you must first solicit information and data from other sources and assemble a preliminary team. The leadership team, in conjunction with the stakeholders, will develop long-range strategic goals that will permit accomplishing a vision statement. Once the leadership team has conceptually developed the plan, the participating stakeholders must be identified. Having identified the stakeholders, they must have an opportunity to review the plan and provide feedback.

These goals will address the global perspectives of all the participants. Associated with the draft of these strategic goals will be the formulation of a number of short-range tactical goals. By involving the various interests in the development of the plan, they will be expected to buy into the implementation of the vision.

The leadership team will be responsible for the on-going implementation of the visionary plan. The success of the plan will depend on continuous stakeholder feedback. This feedback is critical for the successful modification and updating of the plan. It is essential that the plan meet the dynamically changing conditions of the future.

It is important throughout the process of developing this plan that the customers and stakeholders be empowered to work collectively with the leadership team. All the parties must have a feeling of ownership and responsibility in the development and implementation of the plan.

Importance:

A strategic plan should be developed that will meet the future needs and expectations of the stakeholders and future recipients. Any proposed plan that is formulated without this vision of the future will not be focused and will lose the interest of the empowered stakeholders.

A strategic and operational plan must include clear and measurable goals that become the road map to your future vision. Teams must be formed with individuals who are responsible and accountable for the plan's goals. The measurement of the outcomes of these goals will determine the need for modification of these plans.

Plans must be broad in scope and very adaptive. By nature, they require continual review and modification by the stakeholders and leadership teams. This dynamic process requires that 21st Century leadership develop a visionary plan with a global perspective that empowers all stakeholders.

Suggested approach to transferring skill:

- Planning workshops.
- Development scenarios.
- Personnel within the organization.
- Governing boards.
- Other utilities.
- Interested parties.
- Countries.
- Customers.
- Regulators.
- Hired Consultants.
- Public information.
 - public outreach
 - web sites
 - network publishing

Recommended task group membership:

- Kris Lindstrom – Consultant (NWRI Board)
- Blake Anderson – Orange County Sanitation District
- Eric Rosenblum – City of San Jose
- Robert Brotherton – City of Dunedin
- H. Scott Fogler – University of Michigan
- Futurist

Comments:

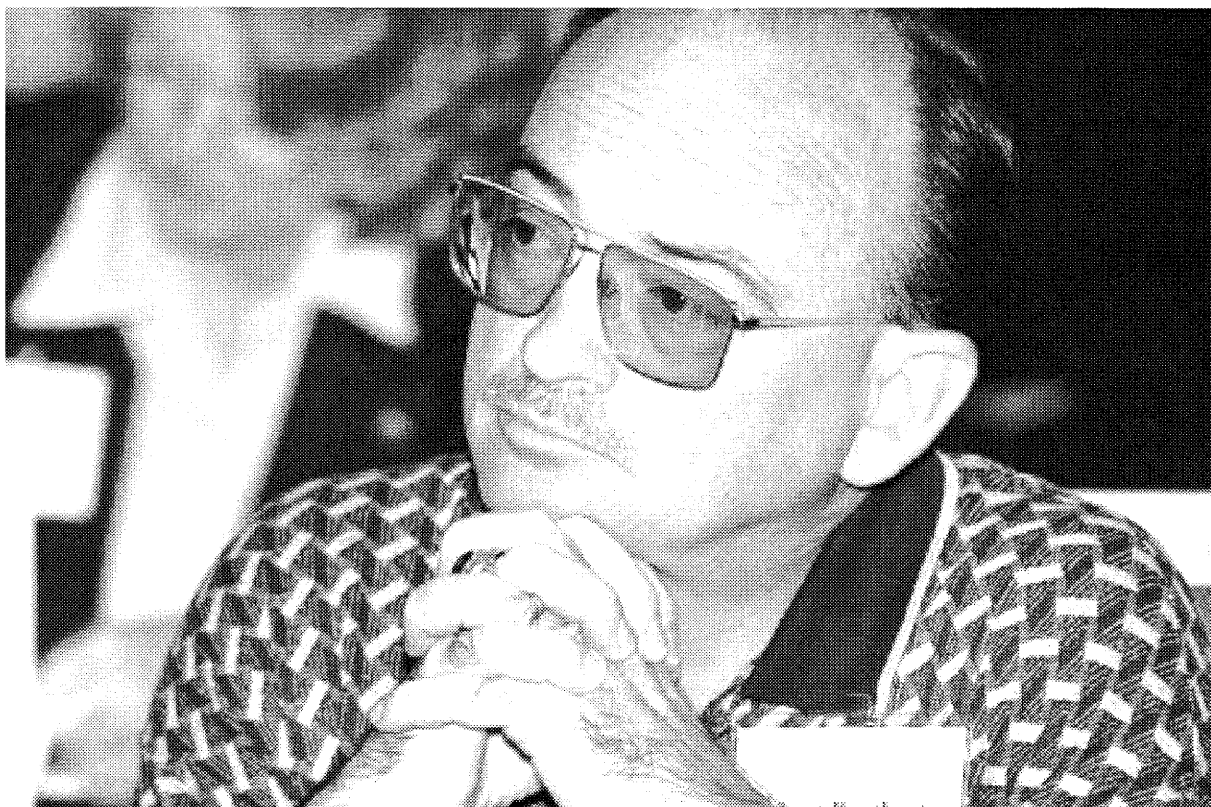
“Perhaps, focus in on the individual leader’s capabilities needed to lead a strategic planning process.” – Brian Brady

“There is a difference in an individual leader who is a visionary and working with a team or group of people to develop a ‘group’ vision. True leaders can take their vision and transfer that vision to the ‘group’ and develop buy-in of the vast majority of the group. This skill has two parts: first, ‘seeing’ the issues and solutions, and then the ability to convince others.” – Robert H. Brotherton

“Suggestions made by the committee that we should have focused more on the leader and his/her idea. Our group and my perception is that there would be a leader – he/she would have the original vision – but as leaders, we have all learned that to achieve success on a long term basis others must be invited to participate – buy in and help the leader succeed. Therefore the buy-in, with the right stakeholders, allows and insures the leaders visionary success.” – Cynthia G. Jones

“Need to better stress leadership skills needed to develop and implement a strategic plan. The presentation stresses the function of planning and not the leadership aspects necessary. Presentation describes a process, not leadership skills.” – Jim Nemke

“I would underscore the importance of developing consensus around the vision statement.” – Paul Thormodsgard



PRIORITY 2

Entrepreneurial and Financial Leadership Skills

WORKING GROUP MEMBERS:

Brotherton and Flanagan

Skill description:

Strategic Abilities

- Maximize the use of your resources.
- Partnering for the acquisition of technology.
- The capital reinvestment needed in the future suggests new financial tools.
- The ability to expand the management process to include non-traditional private sector partners.
- Financial/capital investment is the centerpiece skill, e.g., using customers as a financing tool.
- Able to identify what additional services it makes sense to offer to customers.
- Convincing stakeholders that there is a public and financial benefit in a new enterprise.
- Out-of-box thinking.
- Decisions based on long-range vision.
- Acquire related business and/or contract out certain operations.

Operational Abilities

- Resources can mean employees as well as products.
- Know your competition.

- Every employee should connect their every action to a quality product.
- Quantification of unique organizational values.
- Focus on profit margins.
- Be “quality” driven.
- Account for all costs, including environmental impact costs, at inception.

Importance:

With the level of competition being experienced, the utility needs to look at new products and services and finance strategies that will change and expand the current business opportunities of the utility.

Suggested approach to transferring skill:

The Award for Excellence in Entrepreneurial and Financial Leadership Skills

This annual award will be in the amount of \$25,000 and will be judged by a newly established board (task group) of external entrepreneurs nationally recognized with these skills. Applications for the award must be complete and suitable for publication that will be distributed nation-wide. In addition to the first place award, there shall be 10 honorable mention awards in the amount of \$ 4,000 each. Presentation will take place at an annual awards water utility industry banquet.

This process addresses education, recognition, technology transfer, and incentives in the most cost-effective manner on a national level.

Recommended task group membership:

- Steve Case - America On-Line (AOL)
- Scott McNealy - Sun Micro Systems
- Jim Barksdale - Venture Capitalist
- Mel Karmazian - CBS
- Rick Priori - CEO Duke Energy
- Dave Schetter - Tech Coast, UC Irvine.

- Daniel V. Flanagan, Jr. - National Center for Innovations in Public Finance
- William Otterman, “Connect” - University of California, San Diego

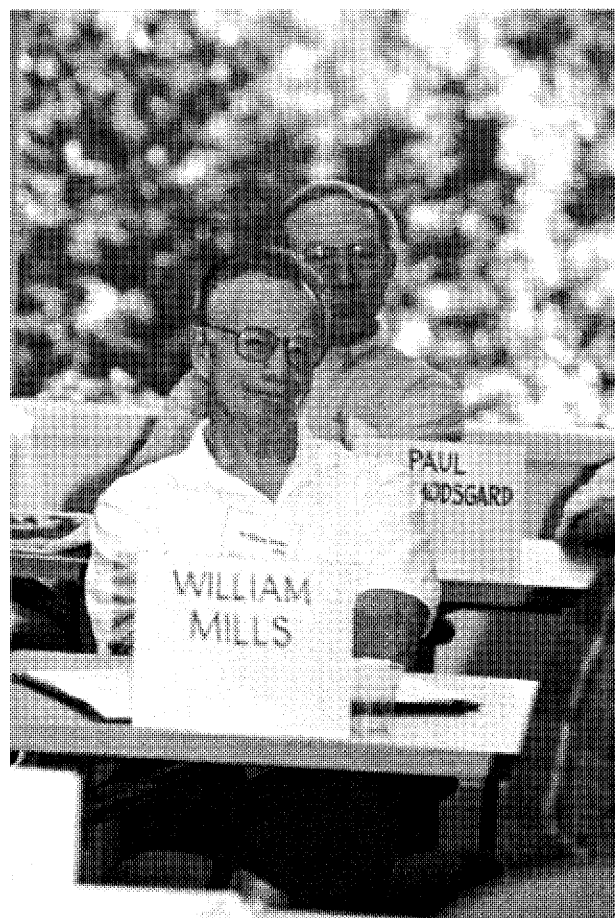
Comments:

“Make cost awareness a part of the culture – activity-based cost accounting and reporting. Instill cost as a case discussion item. Recognize true costs of a program (e.g., out-of-pocket plus opportunity costs).” – Tom Arn

“Customers can be convinced to undertake new activities by other benefits – not just financial benefits – i.e., quality of life, risk reduction, etc.” – Ed Cummings

“Entrepreneurial activities must be initiated for sound business reasons. Creating activities which may distract from the core mission/values of the organization are counter productive. Any activity outside core utility work should add value.” – Peter Dobrolski

“The idea of measuring or rewarding entrepreneurialship is exciting as the successful experience will focus lots of attention on the money saving or utility profits indicating some context of how the entrepreneurial activity enhances overall utility position and continuous improvement.” – Ron Young



PRIORITY 3

Communication as a Strategic and Operational Leadership Skill

WORKING GROUP MEMBERS:

Maxwell and Mills

Skill description:

The ability to recognize the need for and implementation of effective communication with governing boards, customers, the public, staff, media, and project stakeholders. Further, the foresight to anticipate issues and opportunities in order to meet the information needs of the organization as a core business strategy and strategic planning tool.

Importance:

- Effective communication is important to the effective governance of the utility, requiring the development of strategic planning strategies and the support of media tools and empowerment techniques.
- Gaining stakeholder trust and acceptance of the organization's mission provides for the long-term stability of the utility.
- Accurate and positive media communication is critical to public policy development and support of the utility leader.
- A crisis response plan, as a communication tool, is essential to address the immediate concerns of the public in response to droughts, earthquakes, system failures, and other uncontrollable events.
- Public concern over increasing commodity rates due to regulatory and infrastructure requirements can be assuaged through effective communication.
- Communication skills are critical to achieve consensus building in order to repair tears in the political fabric due to interest group politics, single member districts, term limits, and other public policy board pressures.

Suggested approach to transferring skill:

- Develop effective, long-term public information and outreach programs using industry professionals inclusive of a crisis management plan.
- Provide training on interpersonal relations, communication skills, communicating with media, and the importance of non-verbal communication.
- Develop interactive and Internet web sites and voice mail practices to increase communication and convey a positive utility image.
- Develop a working knowledge of policy board skills, backgrounds, and interests to support the communication program.
- Provide training in the development of strategic plans as an effective means of consensus building.
- Create a loose federation of public information facilitators for utility issues under the umbrella of the AWWA.
- Support a public information/public communication bulletin board for success stories with governing boards, project stakeholders, customers, organizational staff, and the media.
- Require all consultant project teams to include public information sub-consultants as a part of their team, but under the direction of the agency's Executive Director or public information office.

Recommended task group membership:

Recommend the establishment of a communication team consisting of agency elected officials, senior staff, and outside and inside public relations professionals with specialized experience in utility agency issues management.

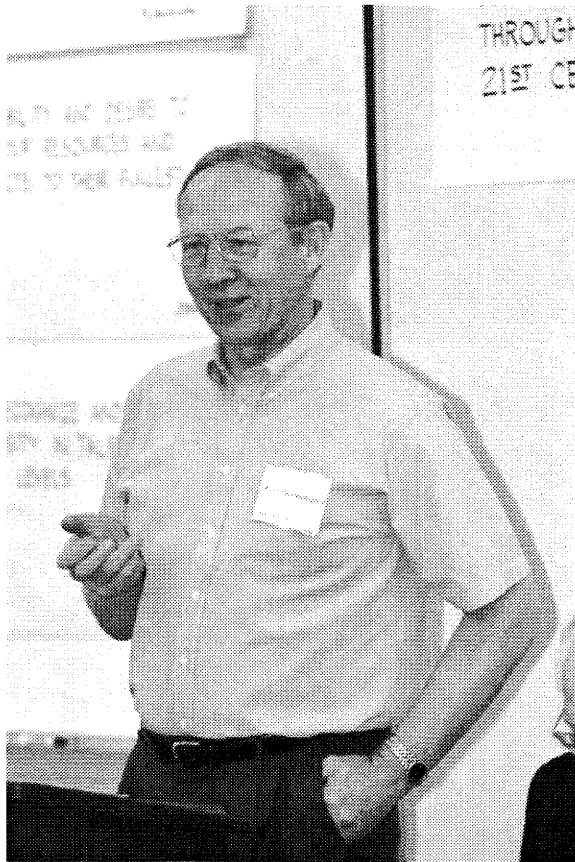
Comments:

“Communication as a proactive measure (armor plating) to elevate customer and stakeholder perceptions of the utility. This offsets periodic public relations challenges or performance-based problems. Also counters negative-publicity thrusts by opponents.

External communications master plan and program, including dedicated staff, as required or utility size allows.

Foster employee as an ambassador.” – Tom Arn

“Include education as part of your communication skill - specifically children through schools, web site, mascot, etc.” – Cynthia G. Jones



PRIORITY 4

Leader as an Organizational Change Agent

WORKING GROUP MEMBERS:

Arn and Thormodsgard

Skill description:

The utility leader of the 21st Century must have strong skills to effect successful organizational change. There are critical skill sets from which he or she will draw from to align and propel the organization to meet the ever-increasing challenges of service and application of effective and efficient utility business practices. The core skill components that the 21st Century leader should possess are:

Creating and Fostering a Vision for the Future

A leader with vision understands where the organization is and where it needs to be at some future point. Vision establishes the destination or goal to which the leader must compel the organization to move. To successfully generate organizational momentum to achieve the goal, the leader must be able to instill a sense of urgency. This skill involves a combination of passion, cheerleading, salesmanship and application of motivation-tools to generate sufficient alignment (coalition) of key players to help motivate other employees and develop impetus to drive the change process.

In formulating the vision, the leader must balance the impacts of structural, cultural, and staff changes for longer-term strategy elements while recognizing the unique cultural characteristics that govern present operational activities and services. Achieving the goal is the objective; however, the route and sequence taken by the organization to reach the goal is just as critical to the process. This skill requires the leader to include in his or her vision formulation a logical progression to goal achievement that fits within the overall mission of the organization.

Preparing the Organization for Change

The leader must develop consensus and alignment within the organization in order to succeed in achieving the vision. Formulation of and implementing the process towards a big audacious goal is realistic only if the organization can get there within its sense of values and means. Status quo must be challenged. This skill involves strategic mapping out of steps required to reach the end point and promoting thinking outside of the box and engaging all stakeholders when articulating the vision.

Major skills include successful communication (selling) of the vision to foster employee support, preparing (coaching) management staff to respond to employee concerns, and recognizing cultural barriers such as core values, group dynamics, and norms that require sensitivity and patience to overcome.

Depending upon the desired outcome, the leader must focus on culture management that may require modification, creation of new, and/or elimination of undesirable cultural elements. The leadership skill is the ability to analyze the culture and assess its dynamics while applying the modifications necessary to achieve cultural change.

Managing the Implementation of Change

Change implementation requires strategic projection and anticipation of the organizational response to change. The leader must possess the skills to understand the natural reactions to change, anticipate barriers and resistance, and learn to control the pace of implementation by applying a blend of patience, forcefulness, motivation, and support during the period of stress and anxiety.

Importance:

The pace of change will continue to increase in the 21st Century. The need for an effective strategy and process to respond to change will continue to accelerate as external and internal forces drive utility direction and business decision making. Proactive anticipation of emerging issues requires a collective approach to planning and implementation of improvement processes and activities. The leader must be able to focus the energies of the organization and obtain elected officials and major stakeholder support of major initiatives in order to implement improved practices, services, and technologies.

Leading an organization requires a structured process of transitioning from the present to the future objective. It is imperative that changes be implemented within the organization as efficiently as possible without causing counterproductive and/or unintended consequences. The leader's skill in understanding the intricacies of change and its associated human/organizational responses will be critical to managing change successfully.

The leader must understand that organizational structure and group dynamics form the foundation by which work processes and interactions occur. Ineffective communications, inter-group rivalries, and other common barriers result from structures that inhibit cooperative interaction. Improvement processes often involve recognizing and removing structural barriers to effective and efficient practices. Implementing new programs often requires modification of the organization's structure as work processes/assignments and employee utilization are adjusted to meet new performance objectives.

Suggested approach to transferring skill:

- **Leadership skill development needs:**

- mentoring and coaching
- study of case histories and other targeted readings
- leadership development programs and application of charismatic approaches to leadership
- cultural analysis
- culture directioning (e.g., strategies to modify, eliminate and create cultures)
- leadership style analysis
- organization theory and behavior (organizational development)
- understanding and addressing behavioral responses to change

- **Application of change agent skills:**

- communicate the vision appropriately
- recruit and delegate authority to individuals who can serve as change champions
- coach and mentor change champions
- provide opportunities for exposure to new ideas
- reward invention and encourage innovation (develop incentives)
- obtain facilitated external support to overcome barriers and serve as a learning tool for the organization
- understand employee needs and responses

Recommended task group membership:

- Larry Morris – City of Aiken
- Tony Parrott – Butler County, Ohio, Department of Environmental Facilities
- Pete Dobrolski – Houston
- Edgar Schien – Harvard University
- Paul Thormodsgard – Green Bay Metropolitan Sewage Department
- Tom Arn – Malcolm Pirnie, Inc.
- Gordon Garner – Louisville and Jefferson County MSD
- Bob Hite – Denver

- Bill Moore – Minneapolis, St. Paul
- Paul Reiter – Seattle Public Utilities

Comments:

“Sincerity - passion, can make up for some sales skills.” – Cynthia G. Jones



PRIORITY 5

Institutional Agility to Anticipate and Meet Challenges of a Changing External Environment

WORKING GROUP MEMBERS:

Brady and Wheeler

Skill description:

Strategic Ability

The long-term viability of a utility will require that it anticipate change and develop the capacity by which to accommodate change. Ours is an era of unprecedented transformation, in which utilities will confront new issues of economic, social, environmental, and political significance. The successful utility and its leaders will possess the skills to respond rapidly and to take advantage of change as a means by which to strengthen the organization and gain competitive advantage.

Although it may not be possible to foresee the exact shape or timing of change, the skillful leader will remain abreast of trends within the industry and around the world; learn to employ emerging technologies; learn from the experiences of colleagues; and communicate effectively with internal and external audiences. Personal traits of honesty, integrity, and creativity will enable the leader to maintain continuity in the face of change and keep his/her equilibrium.

Operational Ability

Evidence of this skill within the organization would include:

- Deployment of demonstrated emerging technologies.
- Development of an external environment scanning program.
- Review of other utilities' experiences with similar operational challenges and incorporation of appropriate solutions for own organization.

- Maintenance of organizational flexibility (both structure and staffing) to react promptly and effectively to new challenges.
- Attraction, retention, and development of management staff which places high priority on understanding the external environment(s) within which the agency operates.
- Development of a corporate culture that encourages internal self-assessment with regard to the organization's continued demonstration of industry best practices.

Importance:

The survival of any organization depends, in large part, upon its ability to accommodate and embrace change. When confronted with such change, a utility will look to its leaders for guidance and direction. The skillful leader must develop solutions to new problems, many times, even as the problem begins to become apparent, and to solve site-specific problems within the context of larger regional, national, and global trends.

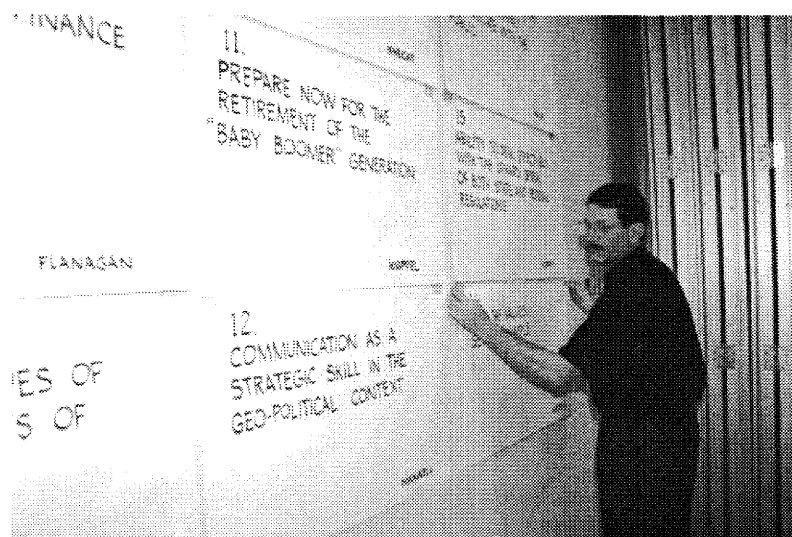
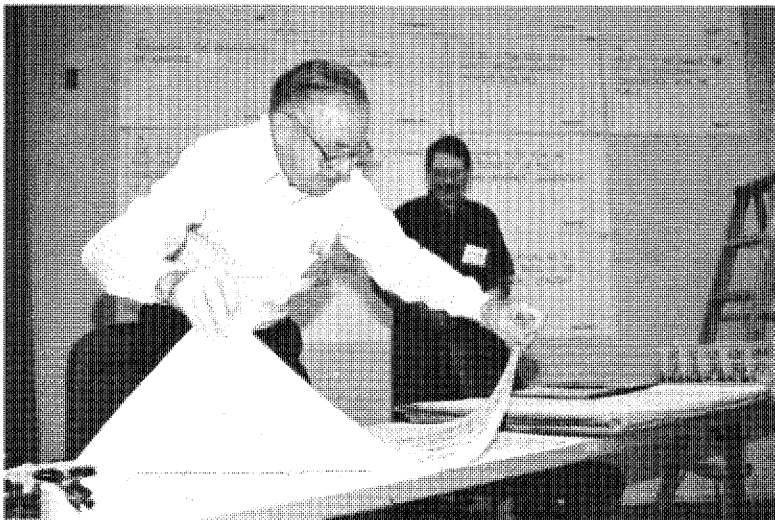
The organization whose leaders respond promptly and successfully to change will become revitalized in the process and gain new momentum from the experience. The well-prepared, knowledgeable leader will bring stability to his organization despite the unsettling effects of rapid change and will offer the prospect of continuity to the wider industry community.

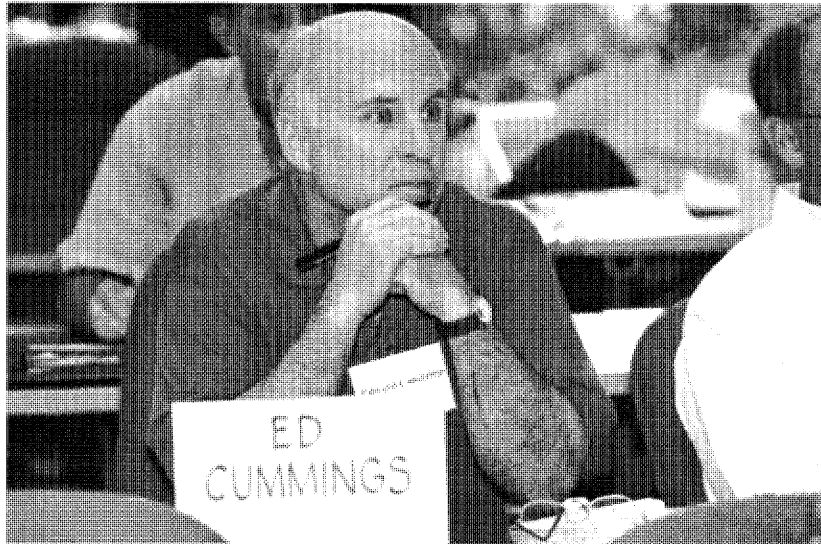
Suggested approach to transferring skill:

- A formal program of scenario planning in which alternative futures are evaluated.
- Active participation in professional associations.
- Continuing contact with community leaders to detect "early warning signals" of change.
- Active linkages with universities engaged in futures research.
- On-going corporate commitment to internal and external scanning and corresponding Strength-Weakness-Opportunities-Threats (SWOT) analysis.
- Familiarization with technological developments.
- Outreach to regional interest groups sharing responsibility for response to change.
- Development of Internet research sources.

Recommended task group membership:

- Scenario planner or “futurist” - John Goodman, the Arlington Group, D.C.
- Participant in a regional problem-solving exercise - Lester Snow, Cal-Fed
- Representative of a utility which has undertaken successful “visioning” or strategic planning - Brian Brady, Dominguez Water, Long Beach, CA
- Local civic leader - Jean Auer, Environmental Water Caucus, San Francisco
- Media representative - Paul Rogers, San Jose Mercury News





PRIORITY 6

Leader Needs to Exhibit Personal Commitment and Live the Values – Must Set the Example

WORKING GROUP MEMBERS:

Cummings and Nemke

Skill description:

- Honesty, integrity, and high ethical standards are essential traits of leadership. A leader needs to consistently react with knowledge, truth, and honesty to internal and external challenges and groups.
- Leaders possess and apply an effective and visible personal moral compass. Personal values are expressed in every daily activity.
- Leaders must be “user-friendly.” They are unbiased listeners, open to various forms of input, and readily approachable. They are capable of retrieving and assimilating a wide variety of information from a number of sources. Their communications are intended to inform, as opposed to educate.
- Leaders continuously demonstrate to employees, customers, and political forces personal mastery and competence in accomplishing the major aspects of their job.
- Effective leaders must use interpersonal skills to convey commitment and values. They know when to be patient and when not to be. They tell the truth with diplomacy, avoid overstatement, and are practical and realistic in their expectations.
- Leaders place trust in their employees through delegation and empowerment.
- Leaders do not sacrifice core values in the name of flexibility or compromise.

Importance:

- Without the leadership of an organization living the values defined as necessary for success in the 21st Century or setting an example, it will be impossible to get buy-in to those values. Without buy-in, the results expected or the goals established will never be met.
- Confidence in a leader, whether by a governing board or subordinate staff, is enhanced by the leader consistently doing the right thing and not advancing a contrary personal agenda.
- A leader who is open and unbiased can take advantage of the diverse views, interests, and perceptions of all stakeholders.
- Demonstration of personal mastery and competence counteracts mistrust that might otherwise develop between politicians, special interest groups and operating agency personnel, and promotes confidence in the leadership and the organization.
- Adherence to high values and standards will result in better decisions.
- Honesty, integrity, and high ethical standards are essential to establish trust and respect. Without trust and respect you cannot lead.
- Employees have to feel that a priority of the leadership is to ensure the success of the employees and protect those employees from unknown adverse impacts on their lives and employment. Employees must have confidence that their leader will be open and truthful with them if and when adverse impacts arise.
- It is important to know when to be patient and when not to be because cultural changes take time, coalition building takes time, establishment of trust takes time – whereas market induced changes happen rapidly, crises are short-lived, etc.
- Trusting and empowering others permits the leader to accomplish more with the resources available because they are authorized to exercise their judgement in solving a problem.
- Leaders gain trust and loyalty if they really care about employees, their families, their work accomplishments, and their activities outside of work. Demonstrate solid ethics, fairness and sincerity at every opportunity.

Suggested approach to transferring skill:

The ability to set an example worth emulating or to live according to a high set of values in the workplace is somewhat inherent in a leader. It probably can not so much be taught or transferred, as reinforced and communicated. You can not take someone who is lazy, dishonest, untrustworthy, insincere or uncaring and through some type of program or magic engrain those traits or skills. A person missing any of these traits is just not good leadership material.

However, reinforcement or demonstration of the leadership skills previously discussed in the section “Skill Description” is possible in a number of ways. Repeated adherence to a high set of personal values by the leadership group will make them an expected part of an organization’s fabric, encouraging others to behave in a similar way. More formal approaches to transferring the skills, or engraining them into the organizational structure, include mentoring and coaching, “soft” skills training, and exposure to workplace experiences. Each approach is more thoroughly defined below:

Mentoring and Coaching

Employees (and others) a leader interacts with can only judge the leader’s commitment to a set of personal values if that leader is accessible and open. A leader must:

- Provide extensive and accurate information on how the organization is functioning. Nothing that relates to the effectiveness and operation of the utility can be hidden from employees.
- Engage employees in discussion and interaction on non-traditional subjects, such as legislative initiatives, technological trends, new management positions and their job responsibilities, visions for the future, etc.
- Try to be much more visible to all employees, whether in routine work situations, emergency response situations, social events, and community activities.
- Understand that life continues to get more complicated and do those things that might ease some of those complications, whether they are work related or personal. Have empathy and show it through daily actions.
- Counter the trend of the information age to have less personal interaction (e-mail, voice mail, etc.) by initiating more one-on-one discussions and face-to-face interactions.

Soft Skills Training

Recognize that certain “soft” skills provide the avenue through which values can be conveyed and reinforced. Those soft skill-training efforts might include:

- Interpersonal skill training.
- “In Search of Excellence” training by Covey.
- Communication training.
- Collaboration training.
- Training in listening skills.
- Ethics training.

Use of interactive workshops and seminars will provide the best opportunity to meld the values with training.

Workplace Experience

Employees need to be provided the opportunity to exercise their judgment and demonstrate their values through independent decision making. Those decisions can be reviewed, supported, or diplomatically critiqued by a leader in relation to the ethics and values expected to be displayed by everyone in the organization.

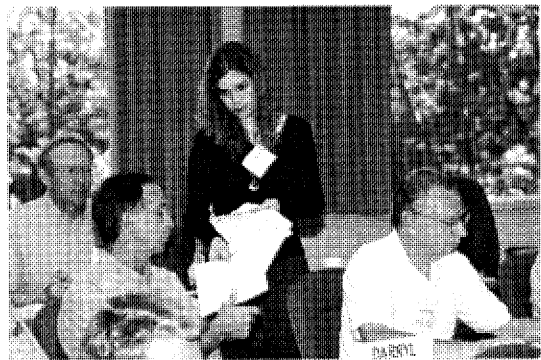
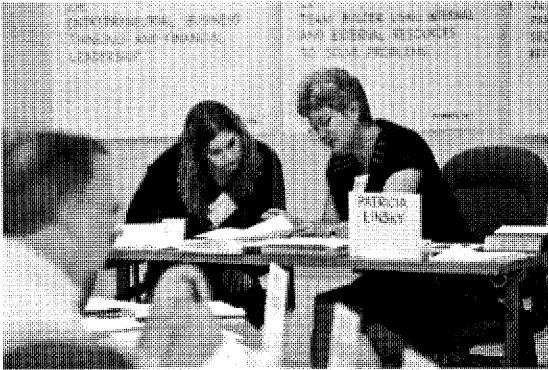
Periodic self assessment by leaders, or 360 degree reviews focusing on value issues, can determine if the moral compass is still pointed in the right direction.

Recommended task group membership:

- Gary Westerhoff – Malcolm Pirnie, Inc.
- Ron Mayo – Ethics Subcommittee Chair for Water Environment Federation
- Cheryl K. Davies – San Francisco Water (650) 872-5903
- Eric Roseblume – South Bay Water Recycling , San Jose, California
- Renu Khator – University of South Florida

Comments:

“Leaders must embody ethics into normal business practices. Make ethical approaches/perspectives a part of the cultural values. Establish organizational code of ethics.” – Tom Arn





PRIORITY 7

Creating Empowered Organizations Through Leadership Development

WORKING GROUP MEMBERS:

Khator and Knippel

Skill description:

Organizations are empowered by their employees--employees who are committed to a vision, have a sense of purpose, and share a common goal. In empowered organizations, employees are the most valued resource. To succeed in the 21st Century, an organization must recognize the value of its employees and create an environment wherein it is possible that each one can achieve his or her maximum potential. The organization must accept and encourage diversity in talents, skills level, and aptitudes. This will allow individuals to develop his or her interests, thereby furthering the goals of the organization.

An empowered organization has the following characteristics:

- Employees work as a team.
- Employees work in cross-functional groups.
- Employees have personal career goals toward which they strive.
- Leaders make a concerted and conscious effort to identify people with management and leadership potential.
- Programs exist to allow people with potential to develop and refine their leadership skills while moving on to higher challenges.
- Employees are working toward a common goal, with everyone's contribution based on his or her abilities, talents, and skills level.
- Meaningful information is offered to employees in meaningful ways.

There are several steps to creating an empowered workforce:

- The first step that an organization must fulfill is the identification of potential leaders from within the organization. Once this has been achieved, it becomes imperative to provide an environment that encourages and nurtures the emerging leaders to practice and hone their skills.
- The second step allows employees a real opportunity to express their talents and skills by assigning them tasks that require a certain level of responsibility, challenge, and independent thinking. During this process, it is important to periodically interact with employees to find out what their interests and personal goals may be. By providing employees with the opportunity to “think outside of the box,” they can exhibit their strengths and weaknesses.
- The third step is to delegate responsibility. Delegation of responsibility and careful monitoring of people’s performance in delegated tasks allows an organization to identify and evaluate, first hand, those people with management and leadership potential.

Importance:

Empowering employees is important because:

- It allows employees to learn from one another rather than relying solely upon their own expertise and experience.
- It allows them to think creatively. When employees take ownership of their work, they develop a certain level of pride and joy in completing their tasks. This gratification drives them to work even harder, thereby excelling in their work.
- It allows organizations to utilize its resources to the maximum. When people see opportunities made available within their own organization, they have a higher level of morale and confidence in that organization.
- Bringing together cross-functional teams allows a richer and fuller perspective on issues. Solutions arrived from a team-building approach are generally more holistic, practical, and well conceived.
- Developing leaders from within is typically the most cost effective. Bringing in leaders from the outside will most likely cost more in terms of salaries and moving expenses. An additional cost that may be difficult to quantify is that which results from the time it takes “imported leaders” to familiarize themselves with the intricacies of the organization.
- Developing leaders from within makes an organization less dependent on outside sources and competition.

- Having a stable and satisfied workforce increases productivity.
- The end result can have a synergistic effect that facilitates creativity, collaboration, and energy that will spread throughout the organization.

Suggested approach to transferring skill:

The primary goal discussed herein is the creation of empowered organizations. Sub-goals that form the core of an empowered organization are:

- Identifying and nurturing those employees with leadership potential.
- Fostering collaborations and team building.
- Helping employees set career goals.

The following suggests three specific programs to achieve these sub-goals:

Leadership Development Program

The Leadership Development Program (LDP), as we envision it, will accept a certain number of employees (dependent upon the organization's size) each year and expose them to fundamental leadership skills. It is recommended that candidates be nominated for this program by their supervisors based on their performance history and their perceived potential for future leadership. The final selection should be made by an independent review committee that has access to (a) candidate's work record, (b) candidate's personal statement, (c) candidate's vita, and (d) letter of nomination from the supervisor.

Once the selection has been made, each candidate (let's call them intern now) will be assigned a mentor who is typically a high-level administrator with proven leadership skills. Interns will work with their mentors for a period of 6 to 12 months, observing their leadership style, attending meetings with them, discussing issues with them, and assisting their mentors on specific projects.

Simultaneously, all interns will participate in a series of roundtable meetings with other leaders from within the organization. Once every two weeks, interns will spend two hours with an area chief who will discuss with them his or her responsibility and how they fit within the overall organization; what his or her personal administrative and leadership styles are; and what are some of the opportunities and challenges that he or she faces in the environment. These roundtables will accomplish two very important goals: first, they will expose interns to multiple tasks within an organization and build the overall picture of the organization; second, it will expose interns to a variety of role models.

At the conclusion of the LDP, interns will be kept in a pool and offered opportunities to compete for advancement.

Cross-functional Teams

An organization may have one or more cross-functional teams, depending upon however many functional themes its employees identify as being important to the mission of the organization.

Thus, the first task is to identify the core functions. It is recommended that once every two or three years, the organization holds a brainstorming session in which employees are asked to identify the most important core functions. Once such functions have been identified, employees can be asked to self-select the teams that most closely match their individual responsibilities. The teams should take four to five months in learning about their assigned core function and examining the way in which the function is currently performed.

Once this self-study has been completed, teams can move on to suggest new, improved, and innovative ways to perform the same function more effectively, more efficiently, and in a more meaningful way. Teams can always invite representatives from other areas to join in or contribute.

Personal Career Goals

If an employee can establish specific career goals, it will be easier for him or her to focus on developing the prerequisite skills. Identifying such goals can best be accomplished with the help of a trained career guidance professional (if an organization can afford such a help).

As an alternative, supervisors can serve as a resource to help employees think about what career paths they may wish to pursue, what training do they need to complete in order to reach the next level, and what opportunities can be seized to develop the necessary skills.

Such an exercise can bring immediate relevance to mundane daily work and help employees realize the connection between their job and the mission of the organization. In the end, this exercise will help employees take ownership of their work and result in a more well rounded and motivated employee.

Recommended task group membership:

Ronald B. Linsky, Executive Director
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Peter Dobrolski
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Jerry Knippel
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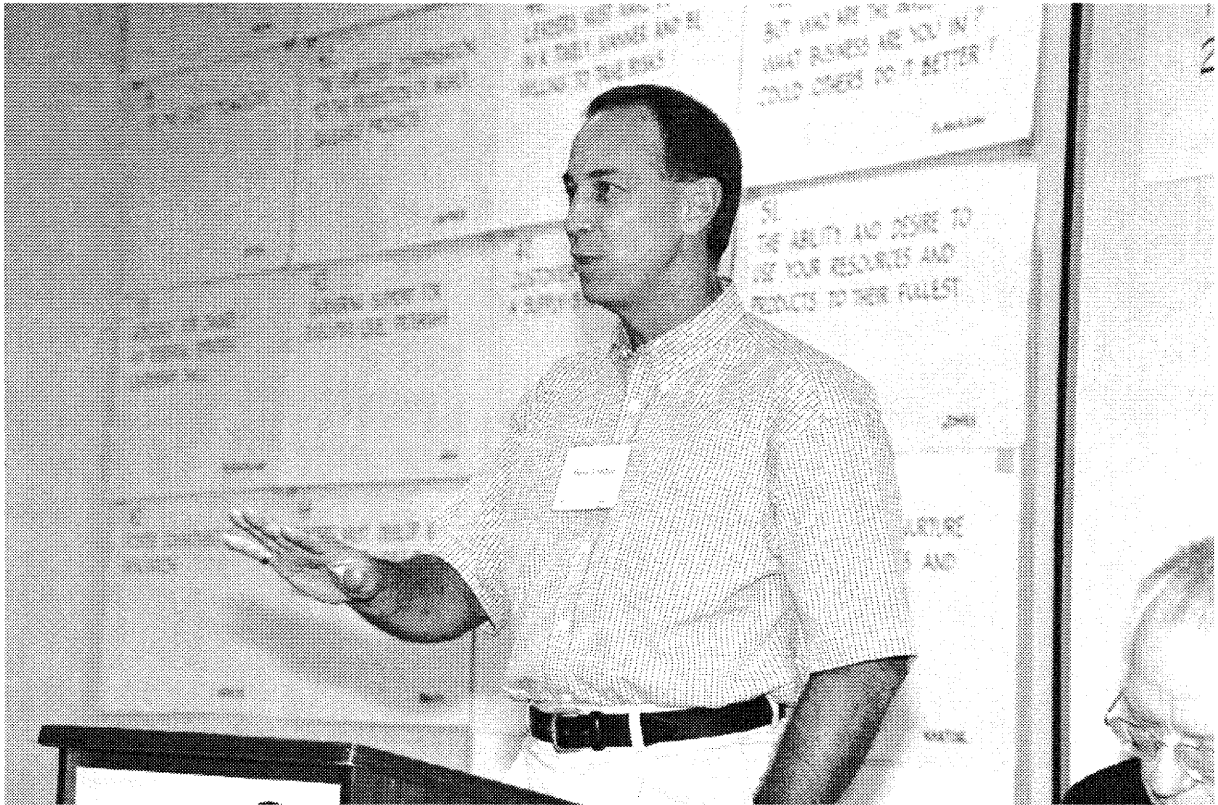
Comments:

“Need strategies to:

- Counter the fear of retribution.
- Open communications.
- Increase accountability and responsibility for outcomes.
- Get out of the way.
- Praise efforts and reward successes.
- Establish boundaries.

These legacy-based issues need to be addressed.” – Tom Arn

“It is important to ensure that empowerment programs have support and buy-in by management and the Board. It is helpful to have the Board and management visible and meeting with the team.” – Bob Ooten



PRIORITY 8

Leaders Must Have the Skills to Identify the Actual Problem and Implement an Effective Solution

WORKING GROUP MEMBERS:

Miller and Morris

Skill description:

- Brings opposing sides together.
- Listens to staff or external stakeholders.
- Identifies several perspectives regarding a potential or existing problem.
- Evaluates problem correctly and identifies causes for the problem.
- Determines alternative solutions to the problem.
- Evaluates alternative solutions and selects the “best” solution.
- Determines a plan for implementing the “best” solution.
- Implements the solution with staff or external stakeholders for the problem identified.
- Creates an agreement where both sides win.

Importance:

- Provides example of logic to go from problem, to cause, to cure.
- Assigns no blame, only a lesson learned.
- Displays leadership to recognize and resolve problems quickly.
- Avoids costs as a result of early identification and solution.

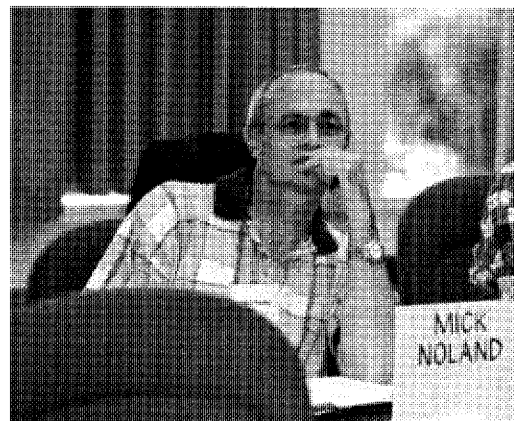
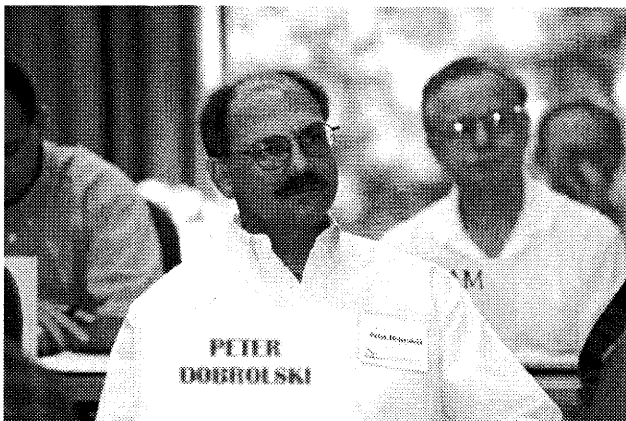
- Prevents an ineffective solution to the problem due to improper identification of the problem.
- Leads to opportunities with other partners, which could lessen fragmentation of the industry, as a result of proper problem identification.
- Builds positive energy by focusing on solutions.

Suggested approach to transferring skill:

- Lead by example.
- Build teams to allow others to come up with new and creative ideas and to take ownership of their contribution.
- Delegate future problem solving and solution decision process to staff, to re-focus their attention each time a problem is encountered.

Recommended task group membership:

- Larry Morris - City of Aiken, S.C.
- Renu Khator - University of South Florida
- Jerry Maxwell - Tampa Bay Water
- Bill Mills - Orange County Water District
- Tom Arn - Malcolm Pirnie, Inc.
- Brian Brady - Dominguez Water Corporation



PRIORITY 9

Leaders Must Plan and Take Action to Provide for the Welfare of All Employees in the Organization

WORKING GROUP MEMBERS:

Dobrolski and Noland

Skill description:

Planning and taking action to provide for the welfare of all employees in the organization encompasses both strategically- and operationally-related skills. Before moving to the operational skill set, it is appropriate to first describe strategically-related skills as a basis of operational implementation.

As part of any utility's long-range planning process, a formal strategic action plan must be developed which includes a section devoted to employee welfare. As it is a given that employee input is a part of any strategic plan, it will be reassuring to staff to see that employee welfare is an important element of the plan. The employee welfare portion of the strategic action plan should address how the organization will use staff to facilitate constant change and should recognize that staff who are visionary and actively pursue change are highly valued. As a part of this identification of "valued visionaries," other staff should be reminded that the utility assigns a high value to the long-term commitment of its employees. The success of the organization is dependent on its employees, but this should be tempered by the fact that length of service alone is not enough to ensure an employee's success.

The employee welfare components of a strategic action plan must be connected to a clear vision of the utility's goals. The underlying strategic importance of the emphasis on the value of employees and their welfare is that this provides an incubator for leadership to emerge at all levels. This leadership can directly affect the cost/benefit ratios of actions taken by the utility and spell the success or failure of a strategic action plan.

Perhaps a little more straight forward, but not necessarily easier to implement, are operational skills related to the welfare of employees. Leaders must provide on-going training opportunities for employees and be an advocate for them before governing boards. Employees must be entrusted to look out after themselves to the greatest extent possible b being empowered with responsibility and resources to achieve greater productivity and

efficiency. Other aspects of skills needed to ensure employees welfare include wellness programs, recognition for jobs well done, and adequate health insurance benefits.

To ensure the maximum effectiveness of the previously mentioned skill sets, utility leaders must be able to communicate clearly, allow staff to make mistakes, get out of the way, encourage feedback, and develop pay plans that reward the true performers.

Importance:

One of the most important assets of a utility is the personnel who keep the organization going. Employees, their families, and the organization are stressed as utilities change. Many changes caused by downsizing, privatization, regionalization, and targeted outsourcing are occurring now and will continue into the 21st Century. Another large and experienced set of employees, the “baby boomers,” will be retiring from the workforce over the next twenty years. The workforce that remains will require different management and leadership than in the past.

The skill levels that are required from our personnel will keep increasing and broadening. Technology has become a prime driver in the workplace and in the operation and maintenance of water systems. Technology drives two employee issues: can we hire the personnel with the needed skills to operate and maintain the new “techno-tools,” and how can we train or transition other employees who are not technically competent. The second issue is critical to both the employee and the utility. The employee is anxious over loss of job status, and the organization must fund the transition.

To mitigate the effects of change on its employees, utilities should encourage good health by providing employees with training, information, and opportunity for self-help. The payback to the organization will be less sick time used, increased personal and professional energy, and a more motivated worker.

Leading employees in new organization will entail allowing them additional access into the management of their environment. Empowering them to make decisions and encouraging their ideas will generate pride of ownership, build morale, and hold their interest in staying with the organization. The utility leader must create a team-based atmosphere of “continuous improvement” to stimulate creativity from all levels of the organization.

Utilities have key individuals who are leaders at all levels of the organization. These individuals must be recognized and nurtured to increase their skills to keep them motivated in the organization. Utilities must hold a high value of these leaders.

Leaders must demonstrate, in words and action, their concern for their employees. As the work force changes, the skills, health, and expectations of the workers will be revised. The smaller, mobile, more technical work force will demand additional input to the creation of their environment. To lead in time of change, employees must be convinced that they are

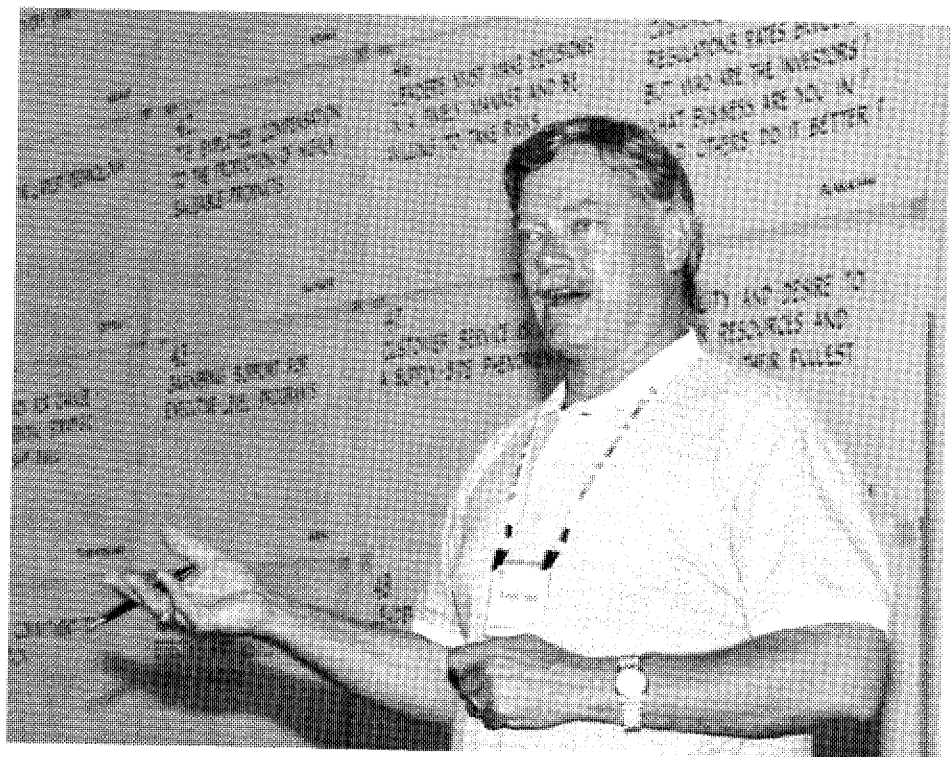
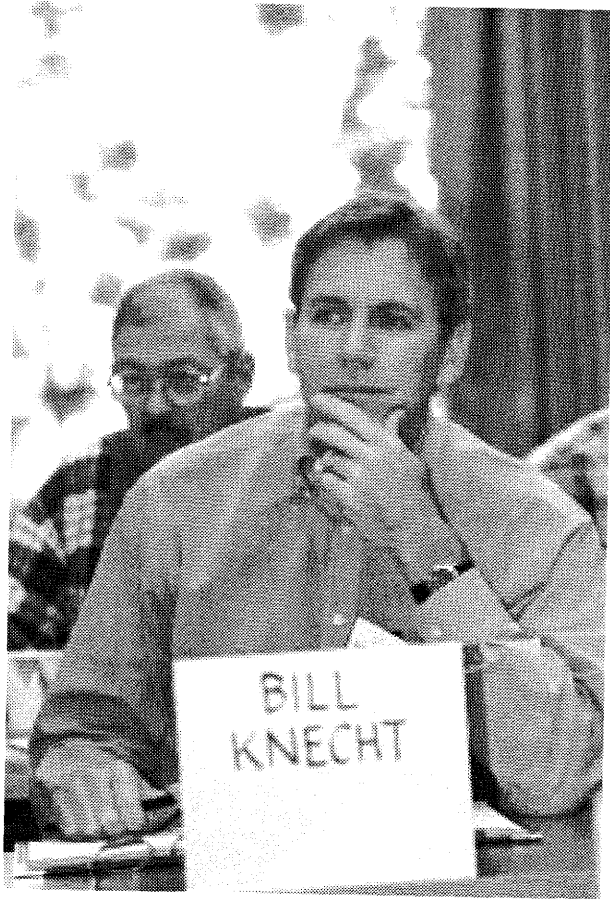
important to the organization. The utility leader must continuously plan and take a personal interest into this key element of the utility.

Suggested approach to transferring skill:

- Formal education/training programs should be developed to enhance staff skills at all levels. This would include leadership/management training for appropriate staff. Leadership training for existing and future supervisors is also critical.
- Individuals in leadership positions should be encouraged to mentor and coach employees around them that show an interest and have the potential to take additional responsibility.
- Consideration should be given to allowing staff to visit other “best in class” utilities to experience different leadership styles.
- Consider using retirees as a resource that can be utilized in various ways.
- Develop internships to tie on-the-job-training and formal education together with commensurate pay increases for demonstrated competencies.
- Ensure that pay for performance plans are in place to reward deserving employees and that pay grades are competitive with the market.
- Give thorough consideration to competitive benefit packages and keep in mind the tremendous importance employees place on health benefits.
- Facilitate and encourage employee teams to develop and implement specific actions related to employee welfare. A reasonable solution prepared by an employee team has the highest likelihood for being accepted.

Comments:

“Need to encourage safety in the work place – free of violence – zero tolerance.” – Cynthia G. Jones



PRIORITY 10

Engage in the Strategic Planning Process and Develop an Operations Plan for Implementation

WORKING GROUP MEMBERS:

Knecht and Young

Skill description:

- Engage in the strategic planning process which includes:

Who:

- A stakeholder group of executive and management staff, governance board, labor leaders, representative customers, regulators, community activists, and peers.

How:

- Fact gathering via anonymous employee surveys.
- Facilitate focus group(s) of representative employees.
- Workshops with stakeholder group.
- Draft of strategic plan is shared with and input is sought from stakeholder group.
- Draft of strategic plan is shared with all employees in open forums by executive management, and feedback is sought by facilitator.
- Final management review with consideration of additional feedback.
- Adoption of plan by governance board.
- Celebrate completion with broad dissemination to a variety of media.

What:

- Mission statement – what we do.
- Vision statement – where we want to be.
- Value statement - principles that motivate the organization.
- Goals and objectives.
- Develop a tactical operations plan at the working group level.
- Create work groups to develop action plans.
 - Define the strategies for accomplishing the objectives.
 - Identify resources required to implement the strategies, e.g., cross-functional teams, budget.
 - Establish timeline for implementation of the strategy.
 - Identify performance measures.
 - Regular review and revision of action plan.

Importance:

- Strategic plan becomes the foundation for utilities direction and decision making.
- Operation plan becomes the primary instrument to assess organizational response and progress.
- Uses consensus process for strategic plan which creates buy-in by stakeholder group.

Suggested approach to transferring skill:

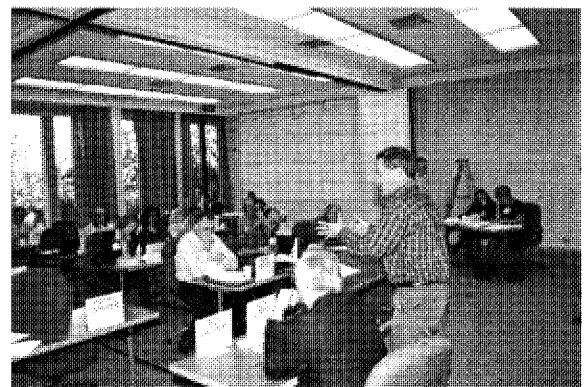
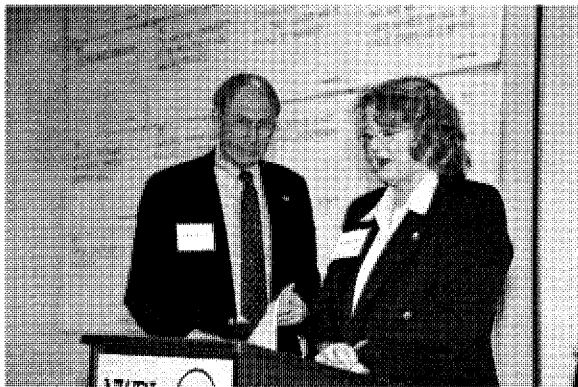
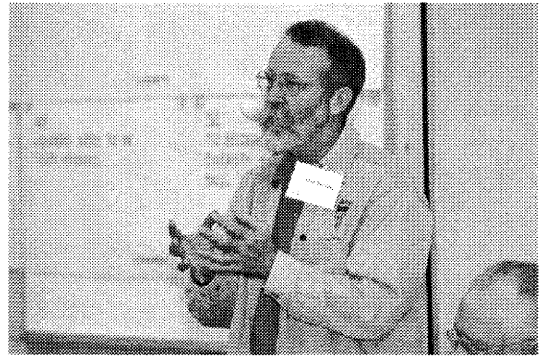
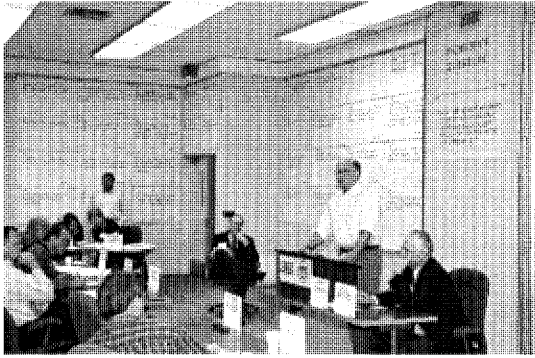
- Use of experienced resources to guide and coach stakeholders through the strategic and operations planning process.
- Process requires effective teamwork and appropriate delegation to achieve consensus-driven plans.
- Provide action plan teams with training in the areas of team building and effective communication skills.

Recommended task group membership:

- Senator Paul Simon
- Doug Wheeler
- Pete Glieck (Pacific Institute, San Francisco)
- Gary Westerhoff (MPI)
- Paul Reiter (Seattle)
- Dan Beard (Audubon)
- George Campbell (Arizona)

Comments:

“Always tie strategic planning into the budget process.” – Robert H. Brotherton



NGT Workshop

INTRODUCTION

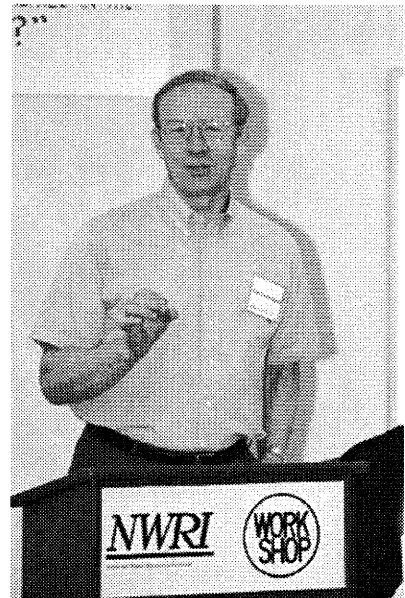
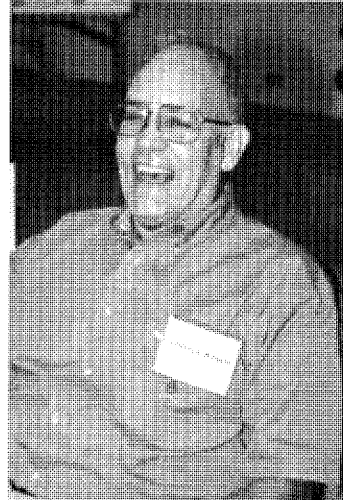
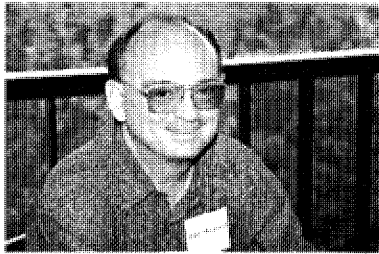
Professors Delbecq and Van de Ven developed the Nominal Group Technique (NGT) in late 1960s at the University of Wisconsin. Their goal was to design a process that would encourage a group of individuals to meet and quickly come to consensus without the usual delays that occur when each participant takes time to establish his or her own credentials before the group, or the dominance of the meeting by one or more highly vocal individual(s). The technique also permits a group of individuals to address a question that could not be resolved satisfactorily by a single individual. This technique has been improved and refined over the past three decades by Dr. William S. Gaither who facilitates workshops for the NWRI.

Leaders in the water utility field were identified by the NWRI, in consultation the co-sponsors, and invited to participate in the workshop. (See Appendix C for Participation List.)

Participants were asked in advance to consider the question: ***What are the most important strategic and operational leadership skills needed throughout utilities in the twenty-first century?*** On the first evening (Sunday, October 24th) workshop guidelines and procedures were reviewed. On the second day (Monday, October 25th) the NGT was conducted. It comprised three distinct steps:

- Leadership skill identification.
- Consolidation of skills into major skill sets, making every effort to avoid overlap between these skill sets.
- Each participant ranking his or her ten highest priority leadership skills.

The 21 participants identified 81 leadership skills during the course of the morning. Titles of these skills were lettered on large sheets of paper and posted on the workroom wall. After lunch the participants were guided through a systematic discussion in which they boiled the 81 skills down to 17 major skill sets. Some of the major skill sets were given a synthetic title to better describe the several individual leadership skills that comprised the major skill set. At the conclusion of the consolidation process, each participant completed a ranking sheet on which they listed what they considered the ten most important major leadership skill sets in descending order of importance. Also, all detailed leadership write-ups were edited and approved by the originating authors.



PRIORITY 1

Visionary Leadership – i.e., Global Perspectives of Long-Term Effects of Projects

ORIGINATORS:

Brotherton and Jones on behalf of themselves, Carnahan, Dobrolski, Knecht, Nemke, and Thormodsgard

The following leadership skills were subsumed under the above title:

Skill title: Visionary Leadership

Originator: Brotherton

Skill description:

Visionary leadership is a “strategic” ability. This is the ability to see into the future and to make adjustments now; the ability to recognize and to understand synergistic opportunities. It includes the ability to anticipate problems before they happen.

Importance:

Technology will solve one problem and will discover three more at the same time. Leaders do not react to problems but will have solutions in place in advance of the problem.

How to transfer this skill:

- Participate in professional organizations.
- Participate in community functions.
- Participate in networking opportunities.
- Read technical journals.
- Know your local and state legislators, and communicate with them often.

Skill title: **Develop a 10-Year Vision Statement That Defines the Goals of the Organization and Empowers the Employees to Implement the Progra**

Originator: Carnahan

Skill description:

The vision statement defines the strategic direction that the utility is to follow during the next 10 years. This implies that the statement requires the development of tactical and strategic goals. This plan should empower the employees to help develop an operational plan as well as the strategic plan.

Importance:

A vision statement identifies strategic goals. It forces the development and implementation of a plan that includes alternative courses of action.

How to transfer this skill:

This skill may be transferred through consultation with employees, other managers, and consultants.

Skill title: **Stakeholder Needs Focused Leadership**

Originator: Dobrolski

Skill description:

The ability to recognize the needs and demands of different stakeholders to formulate a strategic plan. Then lead employees to actuate the plan to fulfill organizational goals.

Importance:

Recognizing and gaining stakeholder trust and acceptance of the organization's mission will provide for the long-term stability of the utility. Stakeholders who are satisfied with the performance of the utility will less likely demand another service provider.

How to transfer this skill:

This skill may be transferred through normal leadership training activities as well as coaching and mentoring.

Skill title: **Global Prospective of Long-Term Effects of Project**

Originator: Jones

Skill description:

Example: Do not refine and purify our resources (water) to the point that the wealthy countries can no longer co-exist with others on our planet.

- Continued purification of water.
- MF/RO/UV eliminating minerals, etc.
- Long-term down-stream effects.

Importance:

Intolerance of other countries' less refined products leads to isolation of wealthy countries from less developed or less technical countries. If our population gets used to "pure," we will lose the ability to travel, and sickness and death will lead us to isolation and then non-compatibility with the rest of the world.

How to transfer this skill:

Leaders must balance knowledge and the study of reuse with common sense and always an eye to future generations.

- Perceive the world as one source, and then work together and learn from one another.
- Think outside the box.
- Partner.
- Listen to other countries.

Skill title: **Reuse and Replenish the Earth's Resources; Leave a Proud Legacy**

Originator: Jones

Skill description:

Be innovative – be aware of the environment; listen to the public; be prepared to create answers to problems.

Importance:

- To work along side environmentalists.
- Answers to questions, or new use of product may come to us through discussion.
- To help us develop future uses and needs.
- Be both active and reactive.

How to transfer this skill:

- Be open and invite input from outside groups. Get their buy-in and support early.
- Partnerships.
- Leave a better place than what you started with – legacy for future generations.
- Balance all visions, i.e., "Last one out leave a park."
- Be prepared to think outside the box and get buy-in from other groups.

Skill title: **Remaining Focused on a Multi-Year Strategic Business Plan (SBP) by Celebrating Successes**

Originator: Knecht

Skill description:

Disarming the nay sayers and chanting the plan lives by:

- Annually sponsoring a forum for meeting with all supervisors and celebrating the success of cross-functional action plan teams.

- Creating opportunities to formally review progress on strategic plans.
- Allowing action plan teams to report on how they have implemented their strategy and moved the organization closer to achieving its objectives.

Importance:

- Helps eliminate silos of information by demonstrating the power of successful cross-functional teams.
- Provides the opportunity to recognize and reward employees.

How to transfer this skill:

- Action plan teams encourage similar approach to solving problems which exist outside the SBP structure.
- Supervisors celebrate successes within smaller work groups.

Skill title: **Getting All Employees Aligned and Working Toward a Shared Vision**

Originator: Nemke

Skill description:

- Not understanding or believing there is a need for change. (Classic head-in-the-sand mentality.)
- Lack of desire or motivation to change.
- Not believing or understanding that the success of every employee is contingent upon the overall success of the organization. Creating a true or vested interest in the organization's success.
- Timing of alignment – Not too fast to cause organizational disruption, but not so slow to put the organization in a noncompetitive position or at risk of not meeting goals.

Importance:

Without alignment or buy-in regarding what needs to happen as an organization, success is unlikely. Alignment can only be quantified initially by assessing attitudes in an informal way. Ultimately, alignment or lack of alignment can be judged by how close to the goals

(staffing numbers, budget, work orders completed, etc.) an organization has moved within an established time frame.

How to transfer this skill:

- Repeat the vision or goals at every opportunity.
 - Relate the vision or goals to every on-going activity to give them relevance.
 - Expose all employees to the “real world” through attendance at conferences, training seminars, etc. so they understand better what is happening in the broader economy and realize that our industry and the required efficiencies are common to all businesses.
 - Develop advocates among the employees that will champion the message that change is necessary and ultimately beneficial to the organization and individual employees.
 - Work at developing trust among all employees that any actions taken ultimately are in everyone’s best interests.
-

Skill title: **Effective Strategic Management Requires Leaders with Operational Skills in Consensus Building**

Originator: Thormodsgard

Skill description:

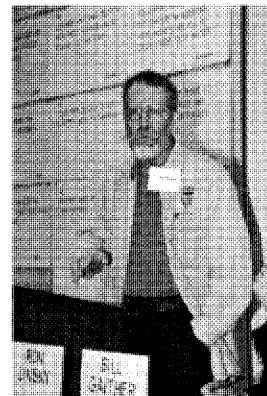
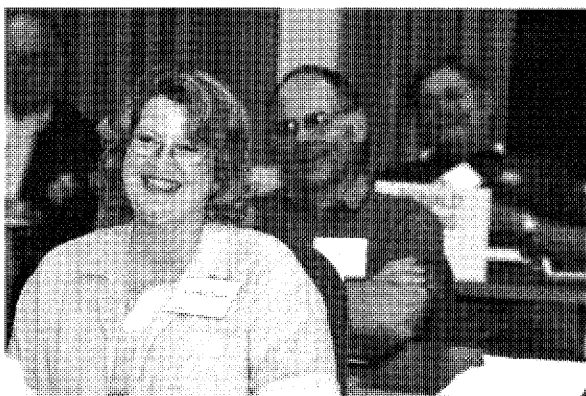
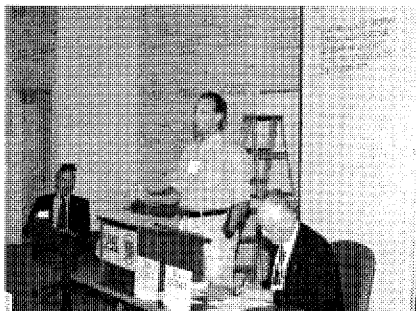
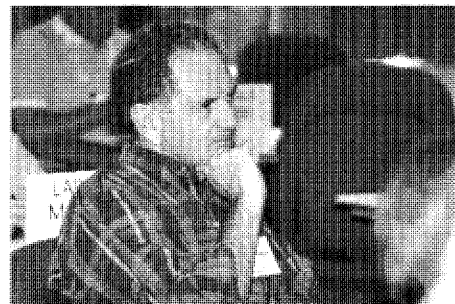
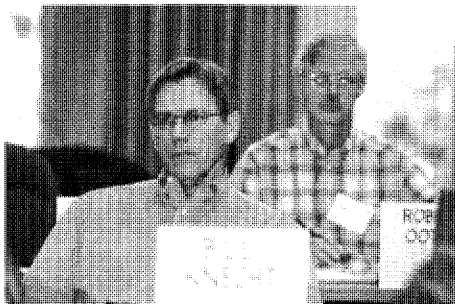
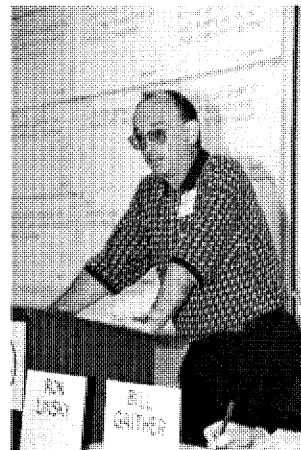
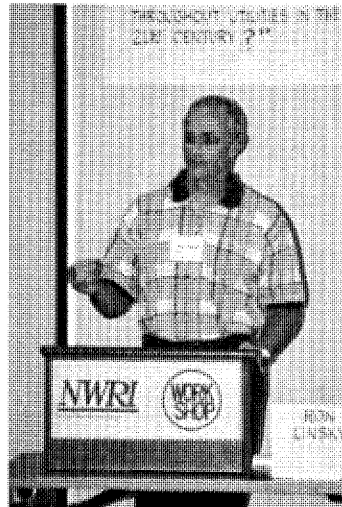
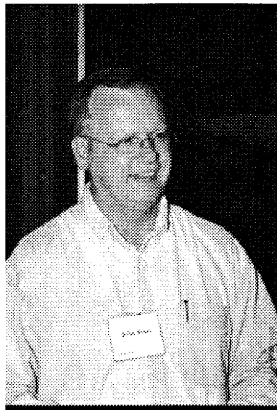
- Strategic planning – mission, vision, principles, and action plans developed jointly by governing board and key staff as well as stakeholders.
- Action plans – prioritize and plan details developed by key staff.
- Plan implementation – work carried out by teams.

Importance:

- Consensus provides for plans which can be broadly supported by the governing board and staff.
- Consensus helps assure continuity of programs and reduction of misunderstanding.

How to transfer this skill:

- Leaders need to understand the importance of consensus and that development of strategic plans can be an effective means of consensus building.
- Leaders need to be trained in the strategic planning process.
- Engage facilitators.



PRIORITY 2

Entrepreneurial Business Thinking and Financial Leadership

ORIGINATORS:

Brotherton on behalf of himself, Brady, Flanagan, Gaither, Jones, Knecht, Maxwell, Miller, Morris, and Noland

The following leadership skills were subsumed under the above title:

Skill title: **The Best Defense Is an Excellent Offense, i.e., Practicing Best Cos Production**

Originator: Brady

Skill description:

- Out-of-the-box thinking.
- Systems approach.
- Scenario planning.
- Zero-based budgeting (annual validation of needs).
- Quantification of unique organizational values.
- Reframing financial discussion.

Importance:

- Ability to remain independent.
- Ability to implement vision more effectively.
- If acquired – they'll have to pay dearly.
- Better story in defense of not being acquired.

How to transfer this skill:

- Workshops – interactive.
- Coursework.

Skill title: Entrepreneurial Business Thinking and Financial Leadership

Originator: Brotherton

Skill description:

Leaders need to:

- Focus on profit margins, not total profits.
- Acquire related business and/or contract out poor operations.
- Be “quality” driven, not “system” driven.
- Consider all costs, including environmental impact costs.

Importance:

With increased demands and limited traditional financial resources, leaders must be willing to shed expensive or poorly-run parts of the organization and acquire new viable opportunities. The current level of service and rates for service will quantify this issue.

How to transfer this skill:

Shed old or acquire new related parts and develop a synergistic value.

Skill title: Knowing How You Will Finance Your Enterprise

Originator: Flanagan

Skill description:

Engineering, public affairs, legal, etc., are all pieces of this mosaic; financial/capital investment is the centerpiece skill. Note restructuring of electric utilities and changes taking place in public/project finance.

Importance:

Nothing happens without investment.

How to transfer this skill:

Education – new public policy curriculum focusing on public finance.

Skill title: **Customers, Stockholders, Boards, Regulations, Rates, Budgets...But Who Are the Investors? What Business Are You In? Could Others Do It Better?**

Originator: Flanagan

Skill description:

- The capital investment needed in this next cycle suggests new thinking – bond referendums are not the solution!
- The water utility has to look at the other models.
- Will you always enjoy tax-exempt financing, being tax exempt

Importance:

- Timing.
- The water utility is the next and last chapter in the deregulation of American infrastructure industries.

How to transfer this skill:

- Procurement vs. Investment.
- Public/Private Partnership.
- Risk/Reward Assignment.

Skill title: **Customer Infrastructure – Leverage It!**

Originator: Flanagan

Skill description:

Use customers as a financing tool!

Importance:

Historical paradox – invested in plant first then turned to development/customer infrastructure.

How to transfer this skill:

Project Finance.

Skill title: **Tie Employee Compensation to the Production of Highly Saleable Products**

Originator: Gaither

Skill description:

Create a concern on the part of every employee that connects their every action to the immediate production of quality product as well as concern for the long-term improvement of product quality and quantity.

Importance:

Individual compensation is the most effective way to obtain and retain an employee's interest, creativity, and loyalty.

How to transfer this skill:

Establish a compensation system that pays no more than 40% of total (target) compensation as "base pay." This means that 60% will be at risk. Install LED real time production numbers throughout the plant so each person keeps the concern for production of quality product foremost in their minds. Establish quality monitoring that reflects customer expectations for quality as well as regulatory expectations.

For example, establish a competition with the amount of bottled water consumed in the service area. A measure of effectiveness might be market share that is updated daily (LED display number).

Establish a bottled water subsidiary to compete with commercial bottled water supplies. Advertising must make the utility's bottled and/or tap water more attractive than any alternative.

Skill title: **The Ability and Desire to Use Your Resources and Products to Their Fullest**

Originator: Jones

Skill description:

- Use and reuse and reuse your water resources.
- Run plants efficiently and produce a product you want to deal with.
- In-house training and education of employees.
- New technology – support yourself.
- Resources can mean employees as well as products.

Importance:

- Stretch your dollar.
- Become more self sufficient.
- Prepare for future short falls.
- Employee satisfaction and buy-in.
- Use cross-training.
- Open to future possibilities – product or employees.
- Use resources.

How to transfer this skill:

- Education.
- Meeting challenges.
- Become innovative. *

*Commitment to innovation as Doug Wheeler suggested.

Skill title: **Leveling the Playing Field by Competing with the Private Sector for the Management of Other Publicly-Owned Utilities in the Region**

Originator: Knecht

Skill description:

- Convincing stakeholders that there is a public interest and a financial benefit.
- No reward for administrator taking the risk in the public sector.
- Exposing ambiguity in bid proposal which assures all parties are bidding to provide the same level of service.

Importance:

- NIMBY – allows the region to benefit from using one water supplier.
- Improves the financial position of both public utilities.

How to transfer this skill:

Extension of corporate values – which includes protecting the concept of full disclosure for the public.

Skill title: **Partnering with the Private Sector to Achieve Increased Efficiency and Effectiveness**

Originator: Maxwell

Skill description:

- The ability to procure advances in technology and treatment.
- The ability to expand the management team to include non-traditional private sector partners (e.g., scientists, engineers, facilitators, financial analysts, operators).
- The capacity to identify competitive weaknesses (i.e., indirect and allocated overhead).

Importance:

Access to information/data by customers, policy leaders, and employees challenge organizational effectiveness and leadership.

Implementation throughout requires advocates outside the traditional organization to meet public policy needs.

How to transfer this skill:

- Promote collaboration.
- Teach contracting skills.
- Advocate new organizational concepts.

Skill title: **Aging Infrastructure, Replacement Planning, and Decision Making**

Originator: Miller

Skill description:

- Getting decision makers to make long-range decision with short-term impacts.
- Using new technology to extend infrastructure life span.

Importance:

Needed to avoid financial crisis in the future.

How to transfer this skill:

Implementation of plan by staff.

Skill title: **Creating the Superstore**

Originator: Morris

Skill description:

Be able to change our core values.

Importance:

With the level of competition being experienced, the industry needs to look at new products and services that will change and expand the current core values of the industry. We suffer from myopia.

How to transfer this skill:

Expand the mission of the industry beyond provision of water to provision of services associated with water (i.e., why should the electric industry be in the business of provision of water heaters instead of the water utility?).

Skill title: **Ability to Determine What Value Added Services Customers Want**

Originator: Noland

Skill description:

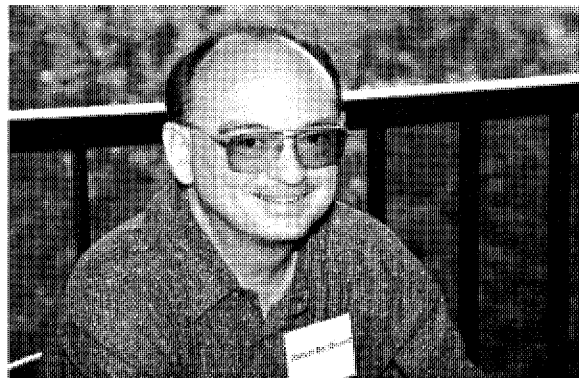
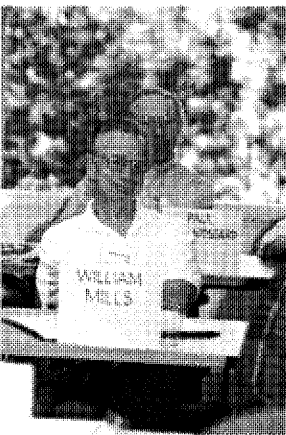
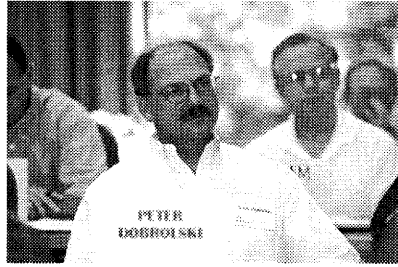
Must be able to identify what additional services it makes sense to offer customers that will make their lives less hectic and more organized.

Importance:

Today's customers would be willing to pay for first-class services at one location if quality is delivered. This would also help to retain existing customers.

How to transfer this skill:

Utilities need to develop marketing strategies with other providers but will probably need outside help.



PRIORITY 3

Communication as a Strategic Skill

ORIGINATORS:

Maxwell on behalf of himself, Brotherton, Dobrolski, Jones, Miller, Mills, Thormodsgard, and Young

The following leadership skills were subsumed under the above title:

Skill title: News Media Leadership

Originator: Brotherton

Skill description:

This is a strategic ability. This leadership skill involves education of the media on complex utility issues so that they can do a proper job. Accurate and positive media communication is critical as a support to the utility leader.

Importance:

Customers read the paper and watch television much more than they read the utility bill inserts. The news media also has a high level of employee turnover; thus, education of these people is more difficult. A small number of negative articles can quickly be a mortal wound to a leader and the utility.

How to transfer this skill:

This is an apprenticeship learning process, not a classroom learning process. Future leaders in the organization must be taught by the agency leader, write press releases, meet the media, learn to master the political spin, and support the political leadership at the same time.

Skill title: **Stakeholder Needs Focused Leadership**

Originator: Dobrolski

Skill description:

The ability to recognize the needs and demands of different stakeholders to formulate a strategic plan. Then lead employees to actuate the plan to fulfill organizational goals.

Importance:

Recognizing and gaining stakeholder trust and acceptance of the organization's mission will provide for the long-term stability of the utility. Stakeholders who are satisfied with the performance of the utility will less likely demand another service provider.

How to transfer this skill:

This skill may be transferred through normal leadership training activities as well as coaching and mentoring.

Skill title: **Maintain and Create an Effective Public Information Progra**

Originator: Jones

Skill description:

- Outreach – information.
- Education – schools.
- Children become the customers of the future. Educate properly now.

Importance:

System in place and available for immediate use – crises – droughts – earthquakes, or new products.

How to transfer this skill:

- Use all sources: computer, newspapers, bills.
- Teachers in school education.

- Public outreach – booths, mascots, handouts, give-aways.
- Create a positive atmosphere that instills confidence.
- Knowledge is power.
- Knowledge relieves anxiety
- Knowledge creates communication.
- Knowledge allows for a level playing field between customer and utility.

Skill title: **Communication as a Strategic Skill in the Geo-Political Context**

Originator: Maxwell

Skill description:

Interest group politics, single member districts, and term limits pressure elected appointed policy makers for high-profile, short-term gains in an arena of significant regulatory change, world-wide private sector R&D investment, scientific public health challenges, and private sector competition. The skill is the ability to communicate the risks and benefits of programs and projects; the ability to convey impacts of decisions in the political arena.

Importance:

Affects customer/taxpayer relationships regarding public and economic health at the local level against a backdrop of significant change in a traditional industry directly influenced by a world economy.

How to transfer this skill:

Focus on the business economics of the utility service and its importance/relationship to the elected/appointed policy makers.

Skill title: **Garner Support of Public for Projects**

Originator: Miller

Skill description:

- Educate public about facts and benefits.
- Nurture stakeholders that support a new project.

Importance:

Public perception can stop projects easier than develop projects.

How to transfer this skill:

“Lead by Example” will translate skill to others.

Skill title: **Ability to Recognize the Need to Effectively Communicate with the Public**

Originator: Mills

Skill description:

- Anticipate issues of concern that could become newsworthy.
- Develop a public outreach program to address the issue and to constantly remind the public of agency accomplishments.

Importance:

Public concern over increasing commodity rates due to regulatory or infrastructure requirements.

How to transfer this skill:

Develop an effective, long-term, and public outreach program, using industry professionals, including a crisis management plan.

Skill title: **Ability to Use the Skills of the Governing Board**

Originator: Mills

Skill description:

Recognizing the value of an elected body as a management tool to further the goals and objectives of the organization.

Importance:

Governing boards contain a wealth of political knowledge, important relationships, and personal experiences that can aid in the selling, presenting, and gaining support for critical issues.

How to transfer this skill:

Know your board's skills, backgrounds, and interests.

Skill title: **Effective Strategic Management Requires Leaders with Operational Skills in Consensus Building**

Originator: Thormodsgard

Skill description:

- Strategic planning – mission, vision, principles, and action plans developed jointly by governing board and key staff as well as stakeholders.
- Action plans – prioritize and plan details developed by key staff.
- Plan implementation – work carried out by teams.

Importance:

- Consensus provides for plans which can be broadly supported by the governing board and staff.
- Consensus helps assure continuity of programs and reduction of misunderstanding.

How to transfer this skill:

- Leaders need to understand the importance of consensus and that development of strategic plans can be an effective means of consensus building.
 - Leaders need to be trained in the strategic planning process.
 - Engage facilitators.
-

Skill title: **Establish Communications as a Core Business Strategy and Practice**

Originator: Young

Skill description:

The major feature is to match the communication requirements and techniques to the desired outcomes. Be able to move from detailed technical levels to broad perception concepts.

Importance:

Effective communication is important because it produces the desired response. The demand for instant communication will require new strategies, tools, and techniques. Every contact requires a different communication skill and strategy. Important to eliminate long existent “we-they syndromes” by using communication to create teamwork and partnerships.

How to transfer this skill:

Provide training on interpersonal relations, communication skills, communicating with media, importance of non-verbal communication. How to use inter- and intranet web sites, voice mail practices.

PRIORITY 4

Advocacy for Organizational Change – An Essential Strategic Leadership Skill

ORIGINATORS:

Thormodsgard on behalf of himself, Arn, Brady, Knecht, Maxwell, and Wheeler

The following leadership skills were subsumed under the above title:

Skill title: **Organizational Culture Management**

Originator: Arn

Skill description:

To effectively and fully change a group or an organization, its culture must be understood. This requires skills at cultural awareness, determining core values, group dynamics, and norms. Depending upon the desired outcome, culture management may require culture modification, creation of new cultures, and destruction of undesirable cultures.

The leadership skill is the ability to recognize cultural dynamics and apply strategic means to manage or change cultural elements.

Importance:

Culture formulates around group and organization tendencies towards stability and establishment of routines and are the least malleable components when seeking to change practices. Cultures derive in a group or organization over long time periods from shared experiences, common values, and assumptions about what is the norm for that group or organization. Successful organizational change requires cultural change aspects as well.

Culture needs to be a core consideration when leading a utility to new horizons.

How to transfer this skill:

Culture Management Skill Development:

- Cultural Analysis Training.

- Culture Directioning (e.g., modifying, destroying and creating cultures).
- Charismatic Vision Development.
- Coaching Strategically.

Obtain facilitated external support as a learning tool for the organization.

Skill title: Managing the Transition of Changes

Originator: Brady

Skill description:

- Understanding the process of change (both why and how).
- Understanding the dynamics of effective change (revolution vs. evolution).
- Understanding the reactions to change (resistance).
- Developing the interpersonal skills to effect organizational change.

Importance:

If change is inevitable and useful, such as the advancement in applied technology, it is imperative that those changes be implemented within organizations as efficiently as possible without causing counterproductive and/or unintended consequences. Possible ways to quantify the importance of change are through benchmarking and operational audits.

How to transfer this skill:

- Mentoring.
- Directed Readings – Managing Transitions.
- Interactive Workshops/Courses.

Skill title: Vision is the Need From Which Organizational Change Evolves

Originator: Knecht

Skill description:

A leader with vision understands where the organization is now and where it needs to be in the future.

- Strategic ability: thinking outside the box is the norm; intense passion for learning; values and listens to all stakeholders and can articulate the vision.
- Operational ability: keeping the focus on the vision while changing the organization's culture to support it.

Importance:

The pace of changes increased dramatically in the nineties. Among the significant changes are the deregulation of power, the information and technology revolution, increasing regulation of water utilities, and privatization. Anticipating change and planning for it will be even more important in the 21st Century.

How to transfer this skill:

- Delegate authority (pushing decision making down gives everyone the opportunity to grow ideas).
- Share your visions and encourage others to do the same.
- Provide opportunities for exposure to new ideas.
- Recruit new hires who have demonstrated vision.

Skill title: Inclusive Establishment of Organizational Core Values That Support/Align with Organizational Vision and Mission

Originator: Maxwell

Skill description:

- Ability to foster organizational understanding of values as cornerstones to success.

- Ability to motivate individuals to participate in the development of core values.
- Commitment to eliminate behavior inconsistent with core values.
- Ability to achieve alignment between vision, mission, and values.

Importance:

In an empowered organization every member must be able to achieve organizational alignment when left alone unsupervised. Competition requires value boundaries or organizational ethics.

How to transfer this skill:

- Teach participative management.
- Demand accountability.
- Believe in commitment.

Skill title: **Advocacy for Organizational Change – an Essential Strategic Leadership Skill**

Originator: Thormodsgard

Skill description:

In order for utilities to become more efficient and competitive, utility leaders must promote change within their organizations.

Major features include: competitiveness assessment, communication, employee involvement, and plan implementation.

Importance:

Improvements in efficiency of utility operations demand a willingness to implement change. Advocacy for change by utility leaders is essential.

How to transfer this skill:

Utility leaders need to become familiar with practical aspects of change management:

- Leadership development programs.

- Study of case histories.
 - Understanding of employee needs and responses.
-

Skill title: Foster Commitment to Innovation

Originator: Wheeler

Skill description:

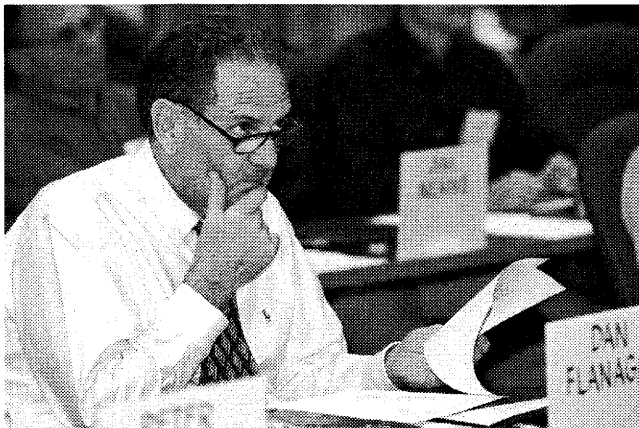
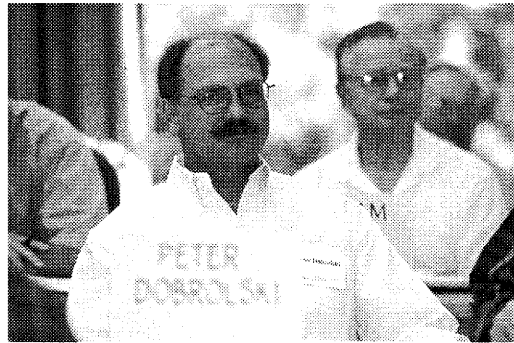
Original thinking is required to solve problems; enhance status of utility as proactive agent of change.

Importance:

Water conservation; energy efficiency are examples of innovation. New ideas will be required to meet challenges of external environment.

How to transfer this skill:

- Promote communication.
- Reward invention.
- Externships in private sector.
- Examples of others.
- Incentives.



PRIORITY 5

Institutional Agility to Anticipate and Meet Challenges of Changing External Environment

ORIGINATORS:

Wheeler on behalf of himself, Arn, Dobrolski, Flanagan, and Jones

The following leadership skills were subsumed under the above title:

Skill title: **Regional and National Industry Leadership**

Originator: Arn

Skill description:

Looking beyond the boundaries of a utility requires strategic vision oriented to achievement of long-term regional and national industry issues and needs.

Importance:

Ecosystem and water basin management strategies require beyond the fenceline coordination, consolidation, and cooperation. Leadership is required to overcome parochial tendencies and leverage the power of coalitions or to fill voids where more knowledge is needed.

How to transfer this skill:

- Establish and support regional alignment and formulate regional organizations.
- Assume regional program responsibility.
- Seek to fill voids in information.
- Work with regulators on regional programs.
- Sell the organization on the benefits of external involvement.

Skill title: Lesson Drawing, Adaptation, and Creativity

Originator: Dobrolski

Skill description:

- Ability to understand other utility's issues and adapt the solution to your organization.
- Risk taking.

Importance:

Continuous changes in the world create new problems that interfere with goals of an organization. Unique solutions must be created to solve local problems.

How to transfer this skill:

- Professional associations with other utilities and industries.
- Keep abreast of current research.

Skill title: The Assimilation of Values Generated by the Phenomena of Economic Change That Has Occurred During the Last Twenty Years

Originator: Flanagan

Skill description:

Revitalizing your organization over some transition period of time to reflect this unique period.

Importance:

Timing – this is an unprecedented time in American economic history, particularly the deregulation of major infrastructure industries.

How to transfer this skill:

An on-going process.

Skill title: **Ability to React with Knowledge, Truth, and Honesty to Outside Challenges and Groups – Flexibility**

Originator: Jones

Skill description:

- Communication – education, knowledge, tolerance of new ideas, partner.
- Demand excellence of those working for you and excellence of your services and products.

Importance:

- Knowledge.
- Skill to communicate – believability.
- Set-backs. Can provide learning.
- Give comfort to the public leaders, be knowledgeable.
- Support City Councils, get buy-in.

How to transfer this skill:

- Leaders ability to deal with the unexpected. Lemons to lemonade.
- Become involved in local groups.
- Go to industry technological meetings.
- Know your product.
- Talk the talk, walk the walk. Be honest and admit when you do not have all the answers.

Skill title: Institutional Agility to Anticipate and Meet Challenges of Changing External Environment

Originator: Wheeler

Skill description:

- Strategically: look and think ahead, without regard to “conventional wisdom.”
- Operationally: retain flexibility of thought and action.

Importance:

A survival skill: Utilities will survive and prosper depending on ability to cope with changes. Thus, significance is incalculable.

How to transfer this skill:

Scenario planning is probably the method best able to foster imagination and mental agility.

PRIORITY 6

Live the Values; Set an Example

ORIGINATORS:

Nemke on behalf of himself, Brady, Carnahan, Cummings, Jones, and Thormodsgard

The following leadership skills were subsumed under the above title:

Skill title: Leaders Must Develop an Effective and Visible Personal Moral Compass

Originator: Brady

Skill description:

- Leader verbalizes his/her rationale for decisions made or recommendations offered (as a coaching opportunity).
- Leader shows little variations in philosophy (few “ideas of the month”).
- Leader does not sacrifice core values in the name of flexibility or compromise (peace and quiet).
- Tasks become duties when linked to values.

Importance:

Confidence in a leader, whether by governing board or subordinate staff, is significantly shaded by the observer’s assumption that the leader is consistently doing the right thing and not advancing a contrary personal agenda.

How to transfer this skill:

- Mentoring.
- Directed readings.
- Interactive workshops/seminars/courses.

Skill title: **Interpersonal Skills Are the Most Essential Elements to Effective Leadership**

Originator: Carnahan

Skill description:

Development of interpersonal skills is as important as development of technical competence. How an employee is told to do a job is as important as the ability of the manager to direct the technical work. The employee must be empowered to make decisions regarding his/her work, but the employee must also know the constraints of this empowerment. This must be done at the lowest level possible so potential leaders may be developed within the organization.

Importance:

It permits the manager to accomplish more with the resources available because the employees are authorized to exercise their judgement in solving a problem. However, the leader must be willing to accept responsibility for the action of the employee.

How to transfer this skill:

Develop training programs and hold workshops. Mentors are necessary.

Skill title: **Leaders Need to Be “User Friendly”**

Originator: Cummings

Skill description:

- Listen – unbiased.
- Be open to various forms of input and output.
- Retrieve and assimilate wide variety of information from a wide number of systems.
- Evaluate intuitively.
- Provide information as opposed to “education.”

Importance:

- Diverse interests.
- Diverse views/perceptions.
- Different applications of information.

How to transfer this skill:

- Training.
 - Coaching/Mentoring.
-

Skill title: **Knowing When to Be Patient and When Not to Be**

Originator: Cummings

Skill description:

- Cultural changes take time.
- Coalition processes take time.
- Market induced changes happen rapidly.
- Crisis are short lived.
- Leader needs to allocate time appropriately.

Importance:

Timing is everything! Time is the one resource that we cannot replace, borrow, or create.

How to transfer this skill:

- Training.
- Experience.
- Mentoring.

Skill title: **Ability to React with Knowledge, Truth, and Honesty to Outside Challenges and Groups – Flexibility**

Originator: Jones

Skill description:

- Communication – education, knowledge, tolerance of new ideas, partner.
- Demand excellence of those working for you and excellence of your services and products.

Importance:

- Knowledge.
- Skill to communicate – believability.
- Set-backs. Can provide learning.
- Give comfort to the public leaders, be knowledgeable.
- Support City Councils, get buy-in.

How to transfer this skill:

- Leaders ability to deal with the unexpected. Lemons to lemonade.
- Become involved in local groups.
- Go to industry technological meetings.
- Know your product.
- Talk the talk, walk the walk. Be honest and admit when you do not have all the answers.

Skill title: **Live the Values; Set an Example**

Originator: Nemke

Skill description:

Leaders may encourage decision-making, but then be extremely critical when decisions that are made do not exactly conform to the leader's notion of right or appropriate. This undermines employees and discourages future risk taking or decision making.

It is unreasonable to expect hard work from all employees if the leaders are off golfing on company time, or are perceived to be doing so. Leaders have to show by daily actions that they are willing to work at least as hard as they are expecting their employees to work.

Most employees have a limited idea of what the leadership does. The common thought might be that the leaders drink coffee and visit most of the day, when not on the phone or in front of their computers, doing who knows what. Employees will not know if the leadership lives the values if they do not know what the leaders are doing and how they are approaching their responsibilities.

Employees have to feel that a priority of the leadership is to ensure the success of the employees and protect those employees from unknown adverse impacts on their lives and employment.

Importance:

Without the leadership of an organization living the values defined as necessary for success in the 21st Century or setting an example, it will be impossible to get buy-in to those values. Without buy-in, the results expected or the goals established will never be met.

How to transfer this skill:

- Provide more extensive information on how the organization is functioning. Keep nothing that relates to the effectiveness and operation of the utility hidden from employees.
- Engage employees in discussion and interaction on non-traditional subjects, such as legislative initiatives, technological trends, new management positions and their job responsibilities, visions for the future, etc.
- Try to be much more visible to all employees, whether in routine work situations, emergency response situations, social events, and community activities.

- Really care about employees, their families, their work accomplishments, and their activities outside of work. Demonstrate solid ethics, fairness, and sincerity at every opportunity.
 - Understand that life continues to get more complicated and do those things that might ease some of those complications, whether they are work related or personal. Have empathy and show it through actions.
 - Counter the information age trends of less personal interaction (e-mail, voice mail, etc.) by initiating more one-on-one discussions and face-to-face interactions.
-

Skill title: **Demonstrate Personal Mastery and Competence**

Originator: Nemke

Skill description:

Show employees, customers, and political forces that you know what you are doing. It is not necessary to know everything well, but know major aspects of the job well. Know when you do not know something and admit it without embarrassment.

Importance:

- Demonstrated skills enhance and promote confidence in the person and organization.
- Generates trust by employees that the leader will have the skills to prevent undesirable end results.
- Counter built-in mistrust between politicians, environmental groups, and operating agency personnel.

How to transfer this skill:

- Show by example.
- Appreciate skills of others and learn from them.
- Teach rational and well thought out approach to problem solving.
- Promote honesty/evaluation of self ability and ability of others.

Skill title: **Honesty and High Ethical Standards – Essential Traits of Leadership**

Originator: Thormodsgard

Skill description:

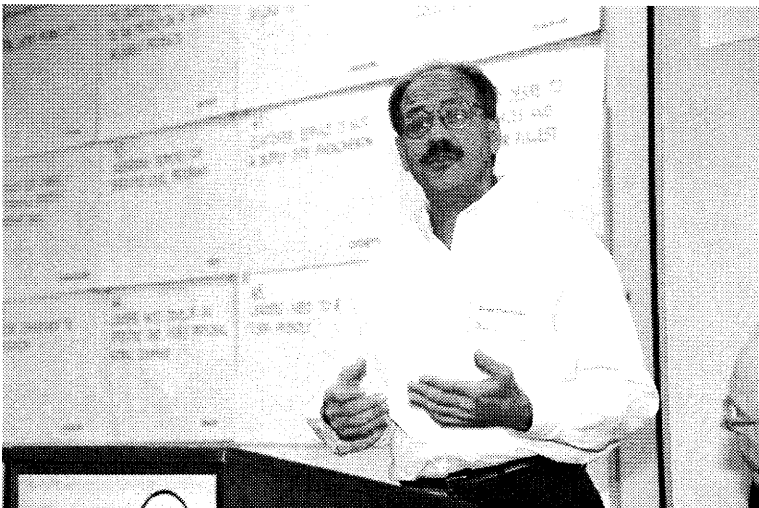
- Tell the truth with a fair measure of diplomacy.
- Avoid overstatement; be realistic.
- Express personal values in your daily activity.

Importance:

- Credibility of leadership.
- Earn respect of those you interact with.
- High values and standards reflected in decision making.

How to transfer this skill:

Self-Assessment.



PRIORITY 7

Identify and Nurture Leaders and Leadership Development Programs That Will Promote Collaborative Team Building Maximizing the Organization's Diversity of Human Resources and Skills

ORIGINATORS:

Linsky on behalf of himself, Dobrolski, Jones, and Khator

The following leadership skills were subsumed under the above title:

Skill title: Team Building Using Internal and External Resources to Solve Problems

Originator: Dobrolski

Skill description:

- Use the skills and talents of all members of the workforce.
- Import the skills that the team is lacking from internal or external sources.
- Empower and coach the team.

Importance:

In an environment of shrinking staff levels, a leader must use the skills of all available resources. Using the team approach can bring many sound improvements to the work process and organization. Bringing cross-functional teams together also has many other benefits for learning, organization development, and morale.

How to transfer this skill:

This skill may be transferred through normal leadership training activities as well as coaching, delegating, empowering, and mentoring.

Skill title: **The Ability and Desire to Use Your Resources and Products to Their Fullest**

Originator: Jones

Skill description:

- Use and reuse and reuse your water resources.
- Run plants efficiently and produce a product you want to deal with.
- In-house training and education of employees.
- New technology – support yourself.
- Resources can mean employees as well as products.

Importance:

- Stretch your dollar.
- Become more self-sufficient.
- Prepare for future short falls.
- Employee satisfaction and buy-in.
- Use cross-training.
- Open to future possibilities – product or employees.
- Use resources.

How to transfer this skill:

- Education.
- Meeting challenges.
- Become innovative. *

*Commitment to innovation as Doug Wheeler suggested

Skill title: Ability to Create Synergy by Allowing Others to Be Creative, Collaborative, and Energetic

Originator: Khator

Skill description:

Two and two can make 4, 1, or 0 depending on what sign you put or do not put there. Synergy is created when 2 and 2 make 22 because they are side by side. Synergy can be both – strategic and operational.

Importance:

This is the only way to maximize the most important resource of all – people.

How to transfer this skill:

- Educate people in the art of listening, trusting, and team-building.
- Delegate.
- Help people take ownership of ideas and actions.
- Communicate meaningful information.
- Have respect for stakeholders, including the employees.

Skill title: Recognize and Nurture Diversity in Talents and Skill Levels

Originator: Khator

Skill description:

A leader recognizes that each one can contribute to the “common goal,” however, in uncommon ways. A successful leader will synchronize people’s talents and organizational needs in order to achieve the common goal.

Importance:

Everyone is allowed to realize their maximum potential.

How to transfer this skill:

- Take interest in employees, their interests.
 - Delegate responsibilities and allow people to develop their skills.
-

Skill title: **Ability to Identify and Nurture Leaders and Leadership**

Originator: Linsky

Skill description:

Analytical skills need to be acquired in order to quantify what leadership means to the organization. To strengthen the organization, and enable the identification of potential leaders, a selection process, based on an organization's culture and needs, should be established to track potential leaders and nurture their development.

Importance:

An organization needs to characterize what leadership means to them. Bringing leadership from outside an organization is not necessarily an advantage. What may work for one organization may not work well for another.

How to transfer this skill:

Develop an organization-specific nurturing program based on the organization's vision and what leadership means to the organization and transfer it through an in-house development program.

Skill title: **Determine the Value of Leadership's Contribution at All Levels to Your Utility**

Originator: Linsky

Skill description:

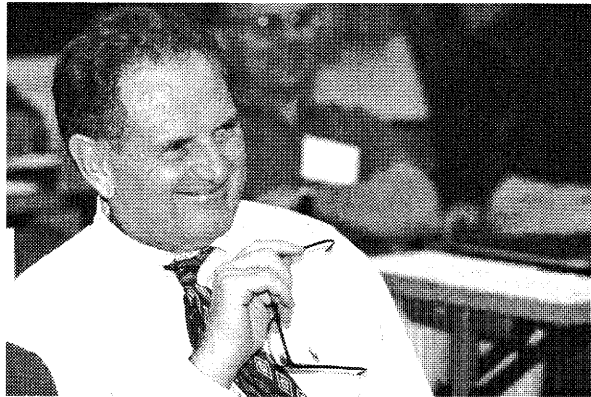
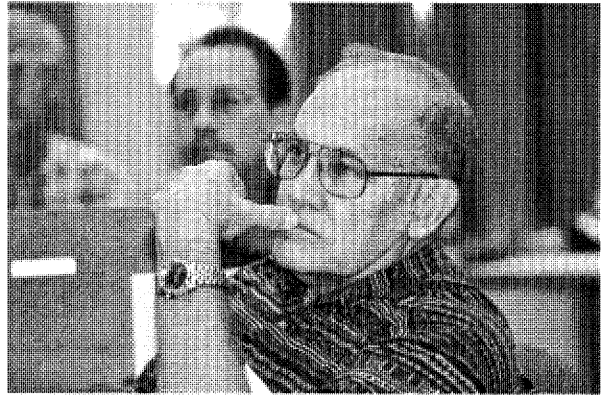
The ability to determine value will provide an expanded perception of benefits and cost.

Importance:

Leadership should be considered an asset that provides services that have value and requires investments.

How to transfer this skill:

Through education and training, inculcate the concepts of valuing into the organizational culture.



PRIORITY 8

Leaders Must Have the Skills to Identify the Actual Problem and Implement an Effective Solution

ORIGINATORS:

Carnahan on behalf of himself, Flanagan, Khator, and Morris

The following leadership skills were subsumed under the above title:

Skill title: **Leaders Must Have the Skills to Identify the Actual Problem and Implement an Effective Solution**

Originator: Carnahan

Skill description:

Frequently, the symptoms are treated, but the actual problem is not solved. This leads to expensive delays and inappropriate costs. Here is an example found in "Strategies for Creative Problem Solving," H. S. Fogler, et al. A bear was chasing a graduate student and a professor. The student stopped to put on his running shoes, and the professor told him that the shoes would not help him outrun the bear. The student said all he had to do was outrun the professor.

It is important that the problem be specifically identified and that a plan to implement a solution be developed.

Importance:

Improper identification of the problem prevents an effective solution to the problem.

How to transfer this skill:

Develop an analytical procedure for analyzing problems.

Skill title: **How Do We Get From Here to There?**

Originator: Flanagan

Skill description:

- Recognize transition skills.
- Fragmented industry.
- Consensus and coalition vs. competition, change, and reward.

Importance:

Public policy winners (and losers!) or public policy gridlock (and losers!).

How to transfer this skill:

Analysis by those leaders who see new opportunity and then march toward that threshold. Avoid the “just say no/I’m opposed unless” syndrome. Rather, adopt a more positive public posture of “I’ll support if!”

Skill title: **Ability to Focus on Solutions Rather Than Problems Alone**

Originator: Khator

Skill description:

It is important to understand a problem correctly, but a leader should not exhaust all energy in doing so. S/he will start channeling energy into such questions as: How can we solve it? What can be done about it?

Importance:

Without this skill, problems will overwhelm the organization. Focusing on solutions builds positive energy.

How to transfer this skill:

- Train people to look for solutions and to refocus their attention each time a problem is encountered.

- Establish simple tactics, like a sign card on top of the desk, to remind people that all problems are born with solutions.
 - Allow others to come up with new and creative ideas.
 - Build teams and allow people to take ownership of their contribution.
 - Communicate meaningful information in a meaningful way.
-

Skill title: **Negotiability – Aggregation Instead of Disaggregation**

Originator: Morris

Skill description:

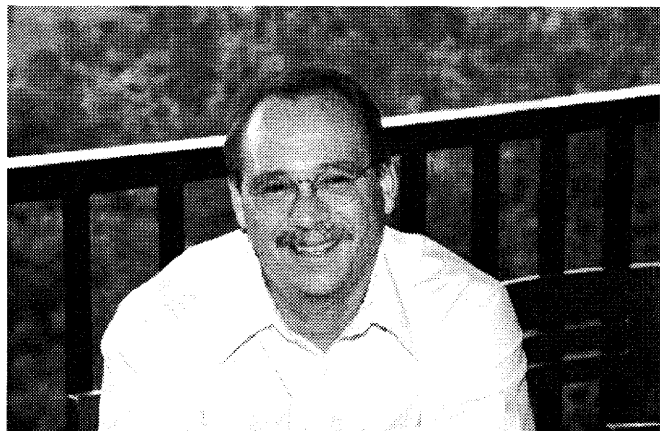
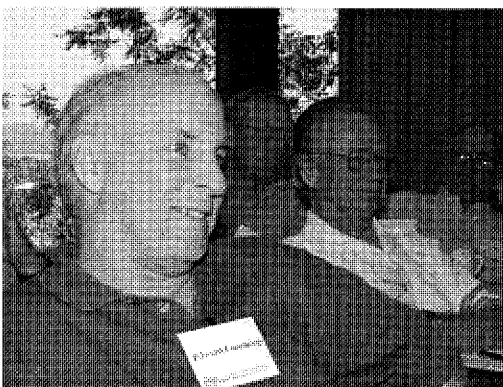
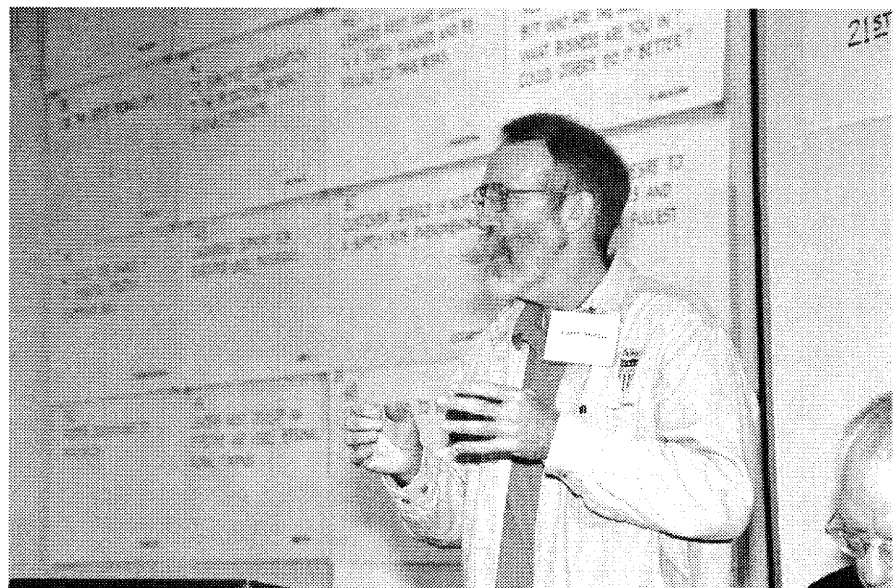
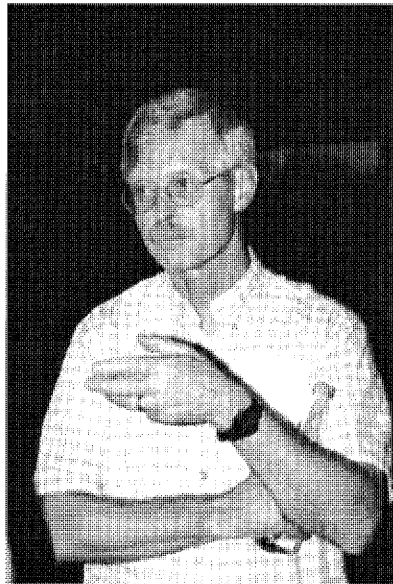
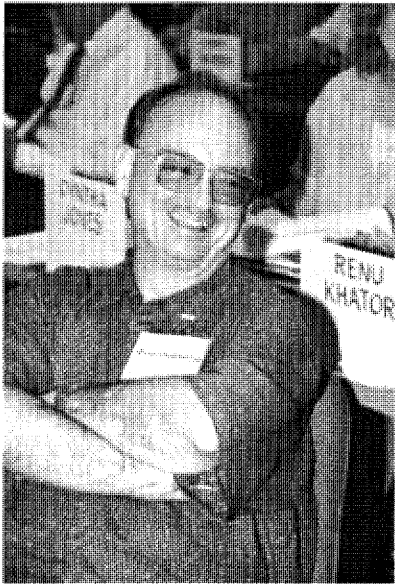
Ability to bring together opposing sides to form not only a consensus but an agreement wherein both sides win.

Importance:

Many utilities have “built out” in their service areas and become stymied in their quest for new resources and income. This skill is needed to break this logjam by partnering with surrounding utilities.

How to transfer this skill:

Train to release our paradigms and embrace the concept of conglomeration instead of consolidation.



The 21st Century Leader Must Exhibit Consistent Concern for the Welfare of All Employees

ORIGINATORS:

Brotherton on behalf of himself, Cummings, Knippel, Morris, and Ooten

The following leadership skills were subsumed under the above title:

Skill title: **The 21st Century Leader Must Exhibit Consistent Concern for the Welfare of All Employees**

Originator: Brotherton

Skill description:

- Provide education opportunities for all employees.
- Be an employee advocate before your boards/commissions.
- Organize now to facilitate constant change.
- Pay for true value and not structural position.
- Look for and promote “visionary” leaders at all levels (longevity is out).

Importance:

To lead in times of change, employees must be convinced that you truly care about them and their best interest. This can be quantified in the amount of resistance shown to change.

How to transfer this skill:

Focus the leader’s time allocations, policy, pay, and benefits on all employees and do not forget all levels, including secretarial staff.

Skill title: **Skill to Shift the Operating Environment From Adherence to Accountability**

Originator: Cummings

Skill description:

Provide a clear vision of the company's goals and empower employees with the tools, resources, and responsibility to achieve them (i.e., let employees take the lead whenever and wherever possible).

Importance:

- Fast pace world -- command and control structure often too slow to cash in on opportunities.
- Adherence to procedures does not foster implementation of "continuous improvements."

How to transfer this skill:

- Training (MBO, etc.).
 - Experiencing such an environment.
 - Mentoring and coaching.
-

Skill title: **Prepare Now for the Retirement of the Baby Boomer Generation**

Originator: Knippel

Skill description:

As a strategy, leadership must recognize the value of its long-term employees. Operationally, we must develop techniques to facilitate the retention of their skills, knowledge, and abilities within the organization while taking into consideration efficiency and cost-effectiveness of the operations.

Importance:

The exodus of retiring "Baby Boomers" can result in the significant loss of resources in the form of skills, knowledge, abilities, and experience. We are experiencing tremendous changes in the average age of our workforce, and as leaders, we must develop techniques to

ensure the transference of this “wisdom” to our entry-level employees. Though we may find that entrants into today’s job market have a higher level of formal education, they often lack the physical skills and “real world experience” to best apply their knowledge and education.

How to transfer this skill:

Mechanisms need to be established to better utilize the skills and life experiences of our aging workforce and retirees. Methods to accomplish this may include:

- Organizing retired workers who want to earn extra income or who want to volunteer their time to serve as mentors in both the academic and work environment.
- Using internships to play a more significant role in the formal education process (at all levels of our educational institutions). “Real world experience” is, perhaps, the greatest deficiency of new entrants into the workforce. This transfer of knowledge needs to start in the academic community and carry on into the workplace.
- Recognition by utility leadership that the value of long-term employees approaching retirement is to serve the role of “teachers,” and more than “doers.” Utilize their skills and knowledge by making them mentors and apprenticeship instructors.

Skill title: **Worker Bee Development**

Originator: Morris

Skill description:

Develop and hold a motivated workforce.

Importance:

Many of the jobs within the utility industry retain the requirement of more manual labor than skilled technical labor. There is a need to provide these employees with a way to feel good about not only their job but themselves.

How to transfer this skill:

Develop an understanding of and relationship with the rank and file. Work to project an image that you are proud of the job they are doing, supportive of their work, and willing to delegate more decision making to them.

Skill title: **Develop Others to Make Decisions**

Originator: Ooten

Skill description:

- Open channels of communication with staff, union.
- Help others formulate plan objectives.
- Develop strategies.
- Let staff hire and fire consultants that train them, and help them assess and plan.
- Allow staff to develop implementation plan for their work responsibilities.
- Let staff do your work by increasing their range of responsibilities.
- Learn to listen.
- Give others credit.
- Remove yourself as in impediment to change.

Importance:

- Let those doing (or who have to do) work determine how it is to be done so they will own it and take pride in it.
- Develop staff by increasing their responsibilities.
- Get a better product that works.
- Employees will spend extra time performing, being enthusiastic, and adding energy to organization.

How to transfer this skill:

- Help develop strategies.
- Delegate authority.

- Train future leaders.
- Form teams but do not participate in teams; let others determine course of action and report to General Manager.
- Provide resources to support.
- Gain Board approval, Management approval to support staff in formulating policies, developing plans, and deciding how to implement.
- Reward success.

Skill title: **Promote Personal and Professional Health**

Originator: Ooten

Skill description:

- Provide stress recognition and training.
- Reduce personal and work stress.
- Stay healthy.
- Promote fitness; encourage others to be healthy (train wellness programs).
- Provide good health insurance and benefits to care for staff without eye on only bottom line.
- Use herbs/vitamins.
- Train yourself to recognize stress symptoms.

Importance:

- Increase personal and professional energy available.
- Increase days at work (sick leave); improve availability.
- Reduce stress to allow handling daily routines easier.
- Reduce costs from employee absences.

How to transfer this skill:

- Take interest in staff.
 - Understand importance of health insurance changes as an impact on employees.
 - Assess moral impacts of this benefit.
 - Demonstrate personal results.
 - Support employees health/well being. (Be careful to not cut benefits too deeply.)
-

Skill title: **Leaders Need to Sell the Value of Training**

Originator: Ooten

Skill description:

- Train staff, supervisors, management, and board on importance.
- Improve skills.
- Change skills (cross train).
- Develop leadership.
- Improve productivity.

Importance:

- Motorola has measures of the value of training.
- Improve productivity.
- Develop staff, leadership.
- Provide Board with positive data about the values of training.
- Safety-training performance measures are available.

How to transfer this skill:

- Use professional societies.
- Develop a system that captures training idea, assigns worth, publishes success, rewards successes, informs Board and management of worth of investment to gain support for future training budgets.
- Train in safety.
- Train technically.
- Encourage staff to be the best.
- Budget 2% of personnel cost for training.
- Provide separate budget for conferences, meetings, and seminars.



PRIORITY 10

Implement Strategies and Operational Plans

ORIGINATORS:

Young on behalf of himself, Carnahan, Knecht, and Thormodsgard

The following leadership skills were subsumed under the above title:

Skill title: **Develop a 10-Year Vision Statement That Defines the Goals of the Organization and Empowers Employees to Implement the Progra**

Originator: Carnahan

Skill description:

The vision statement defines the strategic direction that the utility is to follow during the next 10 years. This implies that the statement requires the development of tactical and strategic goals. This plan should empower the employees to help develop an operational plan as well as the strategic plan.

Importance:

A vision statement identifies strategic goals. It forces the development and implementation of a plan that includes alternative courses of action.

How to transfer this skill:

This skill may be transferred through consultation with employees, other managers, and consultants.

Skill title: **Remaining Focused on a Multi-Year Strategic Business Plan (SBP) by Celebrating Successes**

Originator: Knecht

Skill description:

Disarming the nay sayers and chanting the plan lives by:

- Annually sponsoring a forum for meeting with all supervisors and celebrating the success of cross-functional action plan teams.
- Creating opportunities to formally review progress on strategic plans.
- Allowing action plan teams to report on how they have implemented their strategy and moved the organization closer to achieving its objectives.

Importance:

- Helps eliminate silos of information by demonstrating the power of successful cross-functional teams.
- Provides the opportunity to recognize and reward employees.

How to transfer this skill:

- Action plan teams encourage similar approach to solving problems which exist outside the SBP structure.
- Supervisors celebrate successes within smaller work groups.

Skill title: **Effective Strategic Management Requires Leaders with Operational Skills in Consensus Building**

Originator: Thormodsgard

Skill description:

- Strategic planning – mission, vision, principles, and action plans developed jointly by governing board and key staff as well as stakeholders.
- Action plans – prioritize and plan details developed by key staff.

- Plan implementation – work carried out by teams.

Importance:

- Consensus provides for plans which can be broadly supported by the governing board and staff.
- Consensus helps assure continuity of programs and reduction of misunderstanding.

How to transfer this skill:

- Leaders need to understand the importance of consensus and that development of strategic plans can be an effective means of consensus building.
 - Leaders need to be trained in the strategic planning process.
 - Engage facilitators.
-

Skill title: **Mandatory Implementation of Strategic Plan**

Originator: Young

Skill description:

Strategic planning requires a formal process of establishing the utilities' major priorities and goals. Mission, vision, and values that reflect utility leadership to meet or exceed community needs.

Importance:

Strategic planning is important because:

- It becomes the foundation for the utilities' direction and decision making.
- It becomes the primary instrument to assess organizational response and progress.

How to transfer this skill:

- This can be acquired through learning in classes or from consultants.

- It should adhere to a credible model so that nothing is missed.
- It needs to be measured by receiving periodic reviews ≤ 3 years.

Ability to Find and Retain the Best Staff Possible

ORIGINATORS:

Noland on behalf of himself, Brotherton, Dobrolski, Gaither, and Wheeler

The following leadership skills were subsumed under the above title:

Skill title: **Utility Leaders Provide the Source of Their Entry Level Staff**

Originator: Brotherton

Skill description:

This is an operational ability and a strategic ability. People want to work for and be a part of a successful organization. Upper level managers understand more of their career track, but entry level staff have very limited understanding of a utility career. Utility leaders should work with local high schools to establish “academies” that integrate math/science with career options to feed your utility and similar utilities.

Importance:

Development and improvement of the work force is critical to replace staff. Losses from retirement, or other attrition, will dilute the work force very quickly if entry level employees are not trained and motivated and do not understand their career track.

How to transfer this skill:

Take advantage of existing examples of “career academy” development at the high school level and post-secondary level through the American Public Works Association (APWA).

Skill title.: **Develop New Compensation and Job Descriptions for Organizational Development**

Originator: Dobrolski

Skill description:

- Identify the skills needed to run a utility and design work force skills needed for the future.
- Improve negotiation skills to move employees/unions to new business.
- Develop training programs.

Importance:

“Old” utility work force is based on silo-based job descriptions. Smaller work forces means that employees need to be flexible. However, they must also be compensated appropriately.

How to transfer this skill:

- Learned skills from human relations areas. Lesson 1 drawing from other organizations.
- Negotiation skills from traditional forms of learning.

Skill title: **Tie Employee Compensation to the Production of Highly Saleable Products**

Originator: Gaither

Skill description:

Create a concern on the part of every employee that connects their every action to the immediate production of quality product as well as concern for the long-term improvement of product quality and quantity.

Importance:

Individual compensation is the most effective way to obtain and retain an employee’s interest, creativity, and loyalty.

How to transfer this skill:

Establish a compensation system that pays no more than 40% of total (target) compensation as “base pay.” This means that 60% will be at risk. Install LED real time production numbers throughout the plant so each person keeps the concern for production of quality product foremost in their minds. Establish quality monitoring that reflects customer expectations for quality as well as regulatory expectations.

For example, establish a competition with the amount of bottled water consumed in the service area. A measure of effectiveness might be market share that is updated daily (LED display number).

Establish a bottled water subsidiary to compete with commercial bottled water supplies. Advertising must make the utility’s bottled and/or tap water more attractive than any alternative.

Skill title: **Ability to Find and Retain the Best Staff Possible**

Originator: Noland

Skill description:

In order to take advantage of new skills and technologies, the best and brightest employees must be attracted and retained.

Importance:

In order to move from the monopolistic utility to the competitive utility, new attitudes and cultural changes must be cultivated. This can partially be accomplished with in-house efforts, but, in the long run, must be addressed with new staff that comes on board. If we are truly to be competitive with the private sector, we need the same competent/motivated staffing.

How to transfer this skill:

Recruitment must be taken more seriously and marketing of the positive aspects of working for a public utility.

Skill title: **Develop Interdisciplinarity**

Originator: Wheeler

Skill description:

Managers can no longer function successfully with reference to only one skill set: must relate to, and interact with, a variety of constituents.

Importance:

Interact with board, public officials, media, business and economists, stakeholders, investors, other members of management and labor.

How to transfer this skill:

Identify leaders and leadership (natural selection); reward breadth and depth; recruit from outside.

PRIORITY 12

Create and Build Coalitions

ORIGINATORS:

Cummings on behalf of himself, Knippel, and Morris

The following leadership skills were subsumed under the above title:

Skill title: **Create and Build Coalitions**

Originator: Cummings

Skill description:

Draw groups with diverse interests together and agree on course(s) of action that can be supported (or, at least, not actively opposed).

Understand the diverse interests and ability to create “partnering” opportunities, both internal and external, where none may have been previously identified.

Importance:

Very important in both strategic and operational arenas. Diversity of interests are broadening and, at the same time, often becoming more polarized. With multiple interest groups, there is no clear-cut majority and often no desire for consensus by one or more of the groups. Without a successful coalition, there is no movement.

How to transfer this skill:

- Training – collaboration, interest based bargaining, etc.
- Mentoring from experienced individuals.

Skill title: **Increased Ethnic Diversity and Its Organizational Impact**

Originator: Knippel

Skill description:

Today's leaders must prepare themselves to deal with increasing ethnic diversity in the work force as well as the customer base. The key will be familiarization with these cultural differences and the roles these differences play on the dynamics of the organization.

Importance:

As our world seems to get smaller, and our populations increase, ethnic diversity within our work force, and society in general, will play an increased role in our daily operations. Cultural differences within our organizations may mandate unique and different approaches to meet the needs of our employees as well as our customers.

How to transfer this skill:

The effective leader in the 21st Century will be required to better understand the dynamics of ethnic diversity. Sensitivity training and team building will play a vital role as an integration technique to develop harmony within a multicultural workforce, thereby translating into improved service to a diverse customer base.

Skill title: **Ability to Deal Effectively With the Upward Spiral of Both State and Federal Regulations**

Originator: Morris

Skill description:

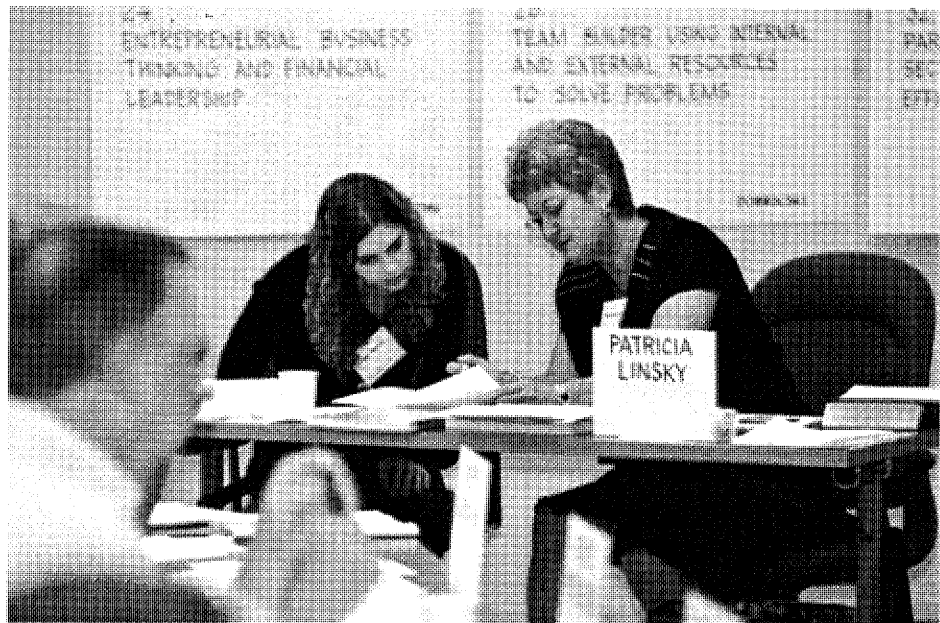
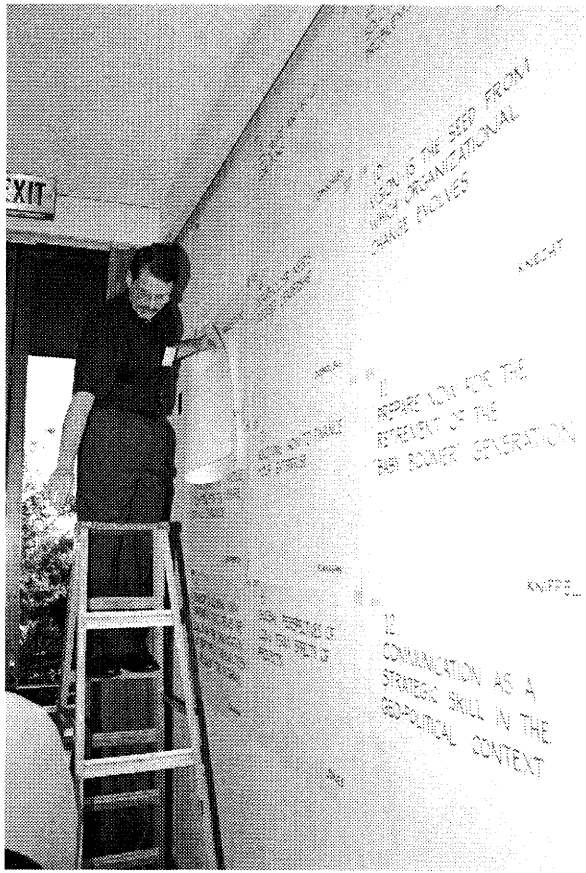
New regulations for operational parameters are passed each year. Many do not approach reality when considering implementation. These regulations become unfunded mandates which needlessly drain utilities of vital manpower and budget resources.

Importance:

Many of these regulations require treatment strategies which can seriously compromise a utility's ability to produce a safe and reliable product. The data on which these regulations are based often fail to provide scientific evidence that the regulation is needed.

How to transfer this skill:

- Become involved with the scientific community in doing more research that provides the data for proposed regulations.
- Partner with the political community to become involved in the decision-making process.
- Educate/form an alliance with the environmental community to promote common sense regulations.



PRIORITY 13

Evaluate and Analyze Utilities' Business Practices

ORIGINATORS:

Young on behalf of himself, Dobrolski, and Miller

The following leadership skills were subsumed under the above title:

Skill title: Lesson Drawing, Adaptation, and Creativity

Originator: Dobrolski

Skill description:

- Ability to understand other utility's issues and adapt the solution to your organization.
- Risk taking.

Importance:

Continuous changes in the world create new problems that interfere with goals of an organization. Unique solutions must be created to solve local problems.

How to transfer this skill:

- Professional associations with other utilities and industries.
 - Keep abreast of current research.
-

Skill title: Benchmark, Set the Standard, Be an Industry Leader

Originator: Miller

Skill description:

- Sober judgement and frankness of current status.

- Quantify the issues.
- Establish industry leadership position.

Importance:

Proof of value for public utility management compared to privatization.

How to transfer this skill:

Focus employee performance to achieving internal standard.

Skill title: Evaluate and Analyse Utilities' Business Practices

Originator: Young

Skill description:

Operational skill as defined by the processes and work practices to achieve effectiveness and efficiency. Strategic skill to develop new practices and products of the utility to meet new needs of the customer.

Importance:

Important to know where you stand in comparison to other utilities and industries and to communicate that with governance board and customers. Awareness of global trends and trend setting practices that impact other utilities. Essential for factual-based decision making.

How to transfer this skill:

This skill can include networking, benchmarking, and proactive involvement in professional organizations, especially outside of water and wastewater.

PRIORITY 14

Leaders Must Make Decision in a Timely Manner and Be Willing to Take Risks

ORIGINATORS:

Carnahan on behalf of himself, and Brady

The following leadership skills were subsumed under the above title:

Skill title: Leaders Should Learn the Art of Subtraction

Originator: Brady

Skill description:

- Validation of needs.
- Challenge corporate norms.
- Challenge corporate entitlements.

Importance:

- Cost savings.
- Sets example for staff.

How to transfer this skill:

Training.

Skill title: **Leaders Must Make Decisions in a Timely Manner and Be Willing to Take Risks**

Originator: Carnahan

Skill description:

The lack of making decisions is the death of any program. A wrong decision may be corrected, but no decision prevents any action. A problem may be over studied for fear of making the wrong decision. This ultimately leads to failure of a program. Risk analysis provides a method of analyzing the problem and a means for developing a contingency plan.

Importance:

Timely decision making determines the success of any program. Delays usually cost money and time.

How to transfer this skill:

Empower the staff to make decisions at the lowest level. This provides experience for staff in developing their decision-making skills. Senior managers must accept the responsibility for decisions made by their employees. Recognize those employees who have done an excellent job.

Leaders Must Personally Champion Applied Technology

ORIGINATORS:

Brady on behalf of himself, Arn, Mills, Noland, and Ooten

The following leadership skills were subsumed under the above title:

***Skill title:* Technologies Management**

***Originator:* Arn**

Skill description:

To effectively manage, apply, and keep current with technology solutions and application, the utility manager will need to possess greater understanding of information technology (IT) and automation developments and the associated behavioral response to their implementation. The critical skill is the ability to focus the organization on effective and efficient use of technologies during and following application, not just on technology investment itself.

How technology is used and accepted is as important as the technology itself.

Importance:

Technologies (e.g., automation and information technologies) are critical to maximizing effectiveness and efficiency. They are evolving at an incredible pace. Future technologies will evolve toward customer-driven, knowledge management systems, incorporating smart logic, and will focus on supporting the intellectual capital resource of the industry and the organization. To fully leverage the investment and potential of technologies requires a corresponding change in how the organization responds to and utilizes the technology.

Elevation of technology as a core business strategy and management focus.

How to transfer this skill:

- Technology management skills.
 - work process design and mapping
 - preparing an organization for technology implementation
 - technology applications
 - Conduct IT master planning as a critical business strategy.
 - Elevate the IT function in an organization to executive-level.
 - Utilize a total program management approach for technology implementation, not just as a project.
 - Develop a choreographed strategy to unveil each new technology program.
-

Skill title: **Leaders Must Personally Champion Applied Technology**

Originator: Brady

Skill description:

- Leader demonstrates mastery of technological aids in personal work.
- Leader promotes importance of new technologies.
- Leader stays abreast of technology uses and interrelationships in his/her industry.
- Leader is fully conversant with regard to technologies used within his/her agency.

Importance:

Technology will account for significant advances in cost reductions and productivity improvements in years to come. The delayed application of proven new technology represent substantial opportunity costs. This loss can be measured by operational audits and benchmarking studies.

How to transfer this skill:

- On-the-job training.
- Training.

Skill title: **Recognizing the Need for Applied Technical Research**

Originator: Mills

Skill description:

Actively supports funding of applied research and development through national organizations, NWRI, and universities; seeks joint funding for internal research projects. Not an easy task to get governing board buy-in.

Importance:

Water and wastewater industries invest very little in improving technologies (e.g., treatment, disinfection, water conservation, etc.) compared to other industries (electrical), the private sector, and the European sector. Most fund AWWARF and WEF. Significant productivity savings (e.g., membrane disinfection) can be achieved.

How to transfer this skill:

- Support funding of applied research at all levels; provide agency funding.
- Communicate need for applied research and development with federal representatives, others.
- Seek federal support.

Skill title: **How to Make the Internet Work for You**

Originator: Noland

Skill description:

Individuals must be able to unlock the potential of the internet for their own utility to provide all types of utility-related information, plus convenience.

Importance:

Existing and potential customers want to find the information they need quickly in order to complete tasks and make decisions.

How to transfer this skill:

Better feedback from customers to determine how and what to set up on web pages. Also, need to make sure web page is up-dated.

Skill title: **Use the Latest Technology**

Originator: Ooten

Skill description:

- Speed up application on new technology by institutions and consultants.
- Be willing to take more risks.
- Search for new ideas worldwide.
- Apply rapidly.
- Change how we plan strategically.
- Innovate – use latest technology.
- Find visionary personnel, consultants.
- Change approach to consultant selection.
- Automate plant.
- Find consultants who will apply new technology.
- Use new processes.
- Change teaching institutions to teach innovation quickly.
- Perform research, apply rapidly.

Importance:

- Reduce costs - \$/MG (dollars per million gallons).
- Reduce staff – O&M staff/MG (operations and maintenance staff per million gallons).
- In the future, new equipment will be only equipment available.
- Remain competitive.
- Create excitement.

How to transfer this skill:

- Promote through professional societies (WERF, WEF, AMSA, etc.).
- Discuss in national and social forums.
- Use site visits by staff to other facilities.
- Inspire staff in need of this approach.
- Get staff involved.



Develop Customer Loyalty as the Utility Bottom Line

ORIGINATOR:

Young

Skill description:

An operational skill applicable to all staff levels that enables customer relations to go beyond satisfaction to loyalty. Loyal customers will not want to switch utilities and will recommend their service providers to others.

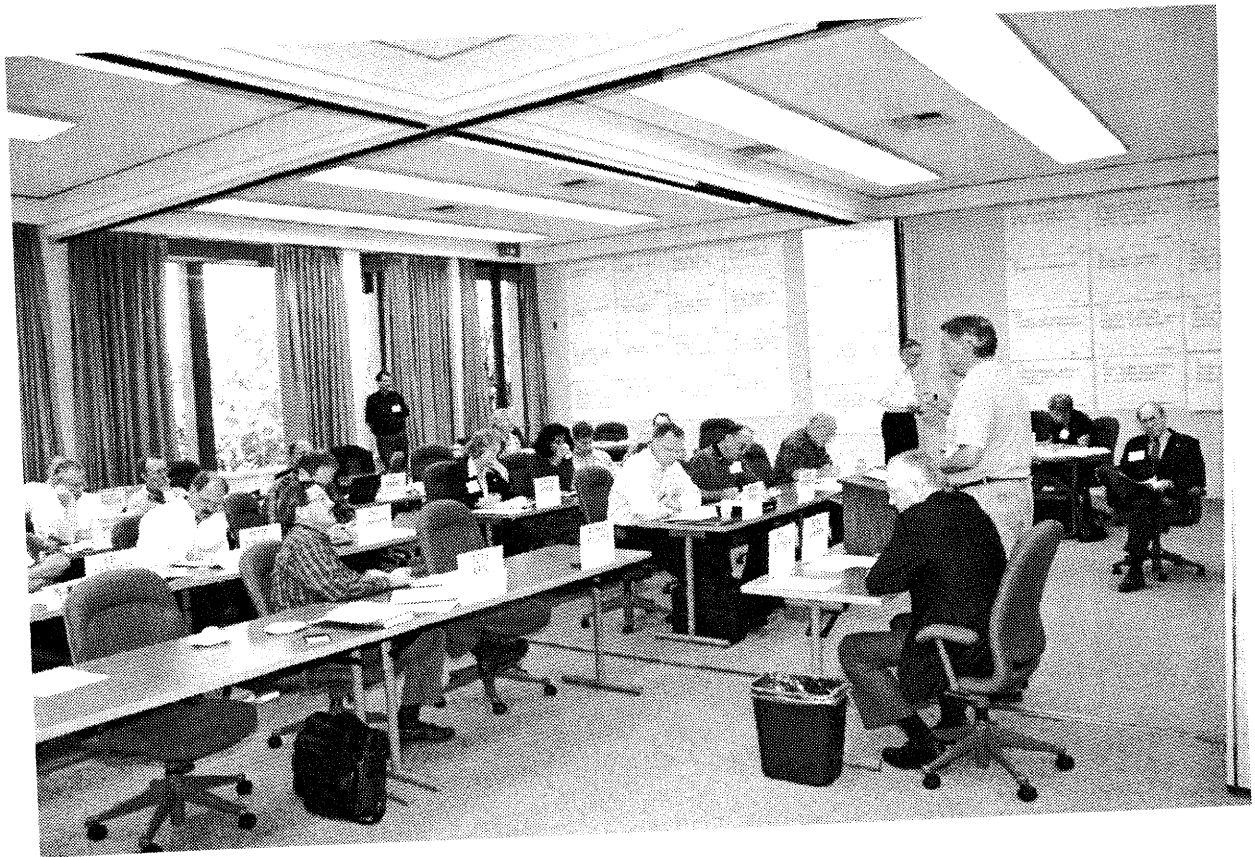
Importance:

This will link the utilities' service intimately with customer's needs and build a long-lasting and responsive business connection.

How to transfer this skill:

This can be learned by:

- Working closely and communicating frequently (mostly listening) with the utility and its customers by instituting formal techniques (e.g., focus groups, questionnaires, and one-on-one question and answer sessions).
- Conducting a class in customer relations and consumer psychology.



Coping with Changing Utility Board Politics

ORIGINATORS:

Miller on behalf of himself and Arn

The following leadership skills were subsumed under the above title:

Skill title: **Garnering Support for Executive-Level Programs**

Originator: Arn

Skill description:

Electeds and major stakeholders govern organizational direction and the ability of the leader to achieve his or her goals and programs. Without support and alignment from above with the program or activity, a leader faces scrutiny, board involvement at the operational level, and possible external criticism.

The leadership skill is the ability to recognize each elected's and external stakeholder's covert and overt initiatives and priorities and create a strategy to gain their support and consensus.

Importance:

Short-term perspectives of and misalignment with electeds and major stakeholders create stresses that can ripple through an organization. To fully expedite an executive-level program, the utility leader of the 21st Century will require adeptness at:

- Educating new electeds so that they understand operational issues.
- Developing and fostering support of actions and activities and activities (e.g., selling).
- Aligning major external stakeholders by understanding how their issues and concerns will be supported or resolved by the program.

How to transfer this skill:

Governance management skill development:

- Listening technique enhancement.
- Principles of salesmanship.
- Negotiation.
- Media relations.

Develop a choreographed strategy to unveil a new program that is tailored to align and prepare each board member or external stakeholder.

Skill title: **Coping with Changing Utility Board Politics**

Originator: Miller

Skill description:

- Nurturing and changing board member opinions.
- Dealing with non-utility agendas or self interests of board members.

Importance:

Need board member support for “new” ways of doing business.

How to transfer this skill:

Prepare staff reports with thorough analyses of impacts and opportunities.

STRENGTH OF FEELING OF PARTICIPANTS AND SUBGROUP ANALYSIS

The following four tables show the strength of feeling of the participants and provide a quantitative sense of the degree of agreement (or lack of agreement) about the importance of each leadership skill area. To provide greater insight, the 21 participants were grouped into three sub-categories: academics, private companies, and public utilities.

The tables give the priority ranking of each major skill set, the number of times it was picked, and the total number of points it received. The strength of feeling is expressed as a percentage. For example, if all participants had selected the same major skill set as their highest priority it would have received $10 \times 21 = 210$ points. In fact, the highest priority skill set was selected as a priority by 17 participants who assigned it a total of 119 points. Thus, the Strength of Feeling is 56.7% which is calculated as $119/210 \times 100$. If no participant selected a particular issue area then its Strength of Feeling will be zero.

TABLE 1

All Leadership Skills (17) Ranked by All Participants (21)

Rank	Title	Times Picked/Pts.	Strength of Feeling
1.	Visionary Leadership – i.e., Global Perspectives of Long-Ter Effects of Projects	17/119	56.7%
2.	Entrepreneurial Business Thinking and Financial Leadership	18/112	53.3%
3.	Communication as a Strategic Skill	19/107	51.0%
4.	Advocacy for Organizational Change – An Essential Strategic Leadership Skill	16/106	50.5%
5.	Institutional Agility to Anticipate and Meet Challenges of Changing External Environment	16/104	49.5%
6.	Live the Values; Set an Example	15/87	41.4%
7.	Identify and Nurture Leaders and Leadership Development Programs That Will Promote Collaborative Team Building Maximizing the Organization's Diversity of Human Resources and Skills	18/83	39.5%
8.	Leaders Must Have the Skills to Identify the Actual Problem and Implement an Effective Solution	10/68	32.4%
9.	The 21 st Century Leader Must Exhibit Consistent Concern for the Welfare of All Employees	13/64	30.5%
10.	Implement Strategies and Operational Plans	14/60	28.6%
11.	Ability to Find and Retain the Best Staff Possible	10/47	22.4%
12.	Create and Build Coalitions	7/41	19.5%
13.	Evaluate and Analyze Utilities' Business Practices	9/40	19.0%
14.	Leaders Must Make Decisions in a Timely Manner and Be Willing to Take Risks	7/40	19.0%
15.	Leaders Must Personally Champion Applied Technolog	10/34	16.2%
16.	Develop Customer Loyalty as the Utility Bottom Line	8/30	14.3%
17.	Coping with Changing Utility Board Politics	3/13	6.2%

TABLE 2

All Leadership Skills (17) Ranked by Academic Participants (3)

Rank	Title	Times Picked/Pts.	Strength of Feeling
1.	Visionary Leadership – i.e., Global Perspectives of Long-Term Effects of Projects	3/26	86.7%
2.	Institutional Agility to Anticipate and Meet Challenges of Changing External Environment	3/22	73.3%
3.	Identify and Nurture Leaders and Leadership Development Programs That Will Promote Collaborative Team Building Maximizing the Organization's Diversity of Human Resources and Skills	3/22	73.3%
4.	Advocacy for Organizational Change – An Essential Strategic Leadership Skill	3/18	60.0%
5.	Live the Values; Set an Example	2/13	43.3%
6.	Entrepreneurial Business Thinking and Financial Leadership	2/13	43.3%
7.	Implement Strategies and Operational Plans	3/13	43.3%
8.	Communication as a Strategic Skill	3/10	33.3%
9.	Leaders Must Have the Skills to Identify the Actual Problem and Implement an Effective Solution	1/9	30.0%
10.	Create and Build Coalitions	1/8	26.7%
11.	Develop Customer Loyalty as the Utility Bottom Line	1/4	13.3%
12.	The 21 st Century Leader Must Exhibit Consistent Concern for the Welfare of All Employees	2/3	10.0%
13.	Evaluate and Analyze Utilities' Business Practices	1/2	6.7%
14.	Leaders Must Personally Champion Applied Technology	1/1	3.3%
15.	Ability to Find and Retain the Best Staff Possible	1/1	3.3%

TABLE 3

All Leadership Skills (17) Ranked by Private Company Participants (5)

Rank	Title	Times Picked/Pts.	Strength of Feeling
1.	Entrepreneurial Business Thinking and Financial Leadership	5/29	58.0%
2.	Institutional Agility to Anticipate and Meet Challenges of Changing External Environment	3/28	56.0%
3.	Advocacy for Organizational Change – An Essential Strategic Leadership Skill	3/27	54.0%
4.	Visionary Leadership – i.e., Global Perspectives of Long-Term Effects of Projects	3/25	50.0%
5.	Live the Values; Set an Example	3/23	46.0%
6.	Communication as a Strategic Skill	4/22	44.0%
7.	Implement Strategies and Operational Plans	4/21	42.0%
8.	The 21 st Century Leader Must Exhibit Consistent Concern for the Welfare of All Employees	3/17	34.0%
9.	Evaluate and Analyze Utilities' Business Practices	4/17	34.0%
10.	Develop Customer Loyalty as the Utility Bottom Line	4/13	26.0%
11.	Leaders Must Personally Champion Applied Technology	3/13	26.0%
12.	Coping with Changing Utility Board Politics	3/13	26.0%
13.	Identify and Nurture Leaders and Leadership Development Programs That Will Promote Collaborative Team Building Maximizing the Organization's Diversity of Human Resources and Skills	4/12	24.0%
14.	Create and Build Coalitions	2/9	18.0%
15.	Ability to Find and Retain the Best Staff Possible	1/4	8.0%
16.	Leaders Must Make Decisions in a Timely Manner and Be Willing to Take Risks	1/2	4.0%

TABLE 4

All Leadership Skills (17) Ranked by Public Utilities Participants (13)

Rank	Title	Times Picked/Pts.	Strength of Feeling
1.	Communication as a Strategic Skill	12/75	57.7%
2.	Entrepreneurial Business Thinking and Financial Leadership	11/70	53.8%
3.	Visionary Leadership – i.e., Global Perspectives of Long-Ter Effects of Projects	11/68	52.3%
4.	Advocacy for Organizational Change – An Essential Strategic Leadership Skill	10/61	46.9%
5.	Leaders Must Have the Skills to Identify the Actual Problem and Implement an Effective Solution	9/59	45.4%
6.	Institutional Agility to Anticipate and Meet Challenges of Changing External Environment	10/54	41.5%
7.	Live the Values; Set an Example	10/51	39.2%
8.	Identify and Nurture Leaders and Leadership Development Programs That Will Promote Collaborative Team Building Maximizing the Organization's Diversity of Human Resources and Skills	11/49	37.7%
9.	The 21 st Century Leader Must Exhibit Consistent Concern for the Welfare of All Employees	8/44	33.8%
10.	Ability to Find and Retain the Best Staff Possible	8/42	32.3%
11.	Leaders Must Make Decisions in a Timely Manner and Be Willing to Take Risks	6/38	29.2%
12.	Implement Strategies and Operational Plans	7/26	20.0%
13.	Create and Build Coalitions	4/24	18.5%
14.	Evaluate and Analyze Utilities' Business Practices	4/21	16.2%
15.	Leaders Must Personally Champion Applied Technolog	6/20	15.4%
16.	Develop Customer Loyalty as the Utility Bottom Line	3/13	10.0%

APPENDICES

APPENDIX A

ACRONYMS

AMSA	Association of Metropolitan Sewerage Agencies
APWA	American Public Works Association
AWWA	American Water Works Association
AWWARF	American Water Works Association Research Foundation
IT	information technolog
LDP	Leadership Development Program
MBO	management by objective
MF	microfiltration
MPI	Malcolm Pirnie, Inc.
NWRI	National Water Research Institute
R&D	research and development
RO	reverse osmosis
SWOT	strengths – weaknesses – opportunities – threats
USC	University of Southern California
UV	ultraviolet
WEF	Water Environment Federation
WERF	Water Environment Research Foundation

APPENDIX B

PREVIOUS NGT WORKSHOPS CONDUCTED BY NWRI

Non-Potable Water Recycling. Report of a workshop sponsored by the NWRI in cooperation with Irvine Ranch Water District and the Orange County Water District. Kellogg West Conference Center/Hotel, California State Polytechnic University, Pomona, CA, May 23-25, 1999: 174p.

Conjunctive Use Water Management Program. Report of a workshop jointly sponsored by the NWRI, Association of Ground Water Agencies, and the Metropolitan Water District of Southern California. Kellogg West Conference Center/Hotel, California State Polytechnic University, Pomona, CA, May 27-29, 1998: 157p.

Barriers to Providing Safe Drinking Water Through Small Systems. Report of a workshop jointly sponsored by the NWRI, Pan American Health Organization, and NSF International/WHO Collaborative Center. Pan American Health Organization Headquarters, Washington, D.C., May 13-15, 1998: English report: 175p., Spanish report: 188p. (Bound in a single volume.)

Barriers to Harvesting Stormwater. Report of a workshop jointly sponsored by the NWRI, L.A. County Department of Public Works, County of Orange Public Facilities & Resources Department, Southern California Coastal Water Project, and the American Oceans Campaign. Kellogg West Conference Center/Hotel, California State Polytechnic University, Pomona, CA, September 22-24, 1997: 159p.

Groundwater Disinfection Regulations Benefits Conference. Report of a conference sponsored by the NWRI. Arnold and Mabel Beckman Center, National Academies of Sciences and Engineering, Irvine, CA, March 17, 1997: 75p.

Groundwater Disinfection Regulation. Report of a workshop jointly sponsored by the NWRI and the USEPA. Arnold and Mabel Beckman Center, National Academies of Sciences and Engineering, Irvine, CA, January 6-8, 1997: 209p.

Membrane Biofouling. Report of a workshop jointly sponsored by the NWRI, UNESCO Centre for Membrane Science and Technology, and CRC for Waste Management and Pollution Control, LTD. UNSW Institute of Administration, Sydney, Australia, November 15-17, 1996: 176p.

The Santa Ana River Watershed. Report of a workshop jointly sponsored by the NWRI and the Santa Ana Watershed Project Authority. Co-sponsors included: City of San Bernardino Water Department, City of Riverside, Western Municipal Water District, and Orange County Water District. Kellogg West Conference Center/Hotel, California State Polytechnic University, Pomona, CA, August 23-25, 1995: 182p.

The New River. Report of a workshop jointly sponsored by the NWRI and the County of Imperial, California. Barbara Worth Country Club, Holtville, CA, May 19-21, 1995: English report: 134p., Spanish report: 134p. (Bound in a single volume)

Establishment of The Middle-East Water and Energy Research and Technology Centre. Report of a workshop jointly sponsored by the NWRI and the Sultanate of Oman through the Worldwide Desalination Research and Technology Survey. Muscat, Oman: September 21, 1994: 29p

Risk Reduction in Drinking Water Distribution Systems. Report of a workshop jointly sponsored by the NWRI and the Environmental Criteria and Assessment Office of the USEPA. Arnold and Mabel Beckman Center, National Academies of Sciences and Engineering, Irvine, CA, February 27-28, 1994: 142p.

Fouling and Module Design. Report of a workshop jointly sponsored by the NWRI and the National Science Foundation (NSF). Virden Conference Center of the University of Delaware, Lewes, DE, October 30 – November 1, 1993: 115p.

Groundwater Disinfection Rule. Report of a workshop jointly sponsored by the National Water Research Institute (NWRI), and the U. S. Environmental Protection Agency USEPA, in collaboration with the Weston Institute. Virden Conference Center of the University of Delaware, Lewes, DE. June 7-8, 1992: 103p.

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