

Fundamentals of Utility Management Training Series



Communications & Project Management

- Understanding why communications and project management are important to operating a successful municipal utility
- Techniques for planning your time, prioritizing your obligations, and evaluating your success
- Ideas for providing constructive input and clear answers on projects
- How to effectively track projects to assure nothing falls through the cracks
- Giving clear directions that are understood the first time and listening well for meaningful feedback
- Sorting out urgent from important
- Understanding and communicating your department's role in the bigger picture
- Preparing for effective/efficient meetings
- Creating a positive working environment
- Knowing what information to share with whom and when

Regulation, Compliance & Safety

- A brief history of utility regulation and how Wisconsin differs from other states
- Overview of utility service rules detailed in Wisconsin Admin Code Chapter 113 — on topics ranging from tree trimming and deferred payment agreements to meter testing and service extensions
- High-level explanation of the rate-making process and PSC dockets
- Fundamentals of labor laws and personnel management, including recruiting, hiring, and disciplining employees
- Discussion of exempt and non-exempt employees, as well as disability, workers' compensation and family medical leave
- Workplace safety rules and leading practices to engage workers to develop a strong safety culture

Utility Accounting & Finance

- How to read financial statements
- Why decisions are made from a financial perspective and what to consider
- How to develop and track your department budget
- How proper invoice coding/inventory tracking affects the bottom line
- Your responsibility to ratepayers and community leaders
- Internal control methods
- Financial tools for assessing utility health
- Audits and regulatory reports (PSC uniform system of accounting)
- Understanding utility tariffs and electric and water rates (wholesale and retail)

Utility Planning and Risk Management

- Planning strategically and thinking "outside the box" — moving beyond "that's the way we've always done it"
- Overcoming resistance to change
- Understanding the advantages of planning and maintenance
- Properly identifying project timelines and responsibilities
- Wisconsin law regarding the bidding process for construction projects
- Developing effective Requests for Proposals (RFPs) and determining an accurate "scope of work" for engineers, contractors, and employees
- Assessing your utility's risk areas and insurance coverage needs
- Proactively addressing security concerns