

Avon Lake Board of Municipal Utilities

**AGENDA**

For

**WORK SESSION**

**Tuesday**

**July 10, 2018**

**6:00 PM**

1. Call to Order
2. Continuous Improvement
3. Adjourn





Avon Lake Regional Water  
**MEMORANDUM**

To: **Board of Municipal Utilities**

From: **Todd Danielson & Rob Munro**

Subject: **Agenda Items – July 10, 2018 Work Session**

Date: **July 6, 2018**

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Item 2: **Continuous Improvement Program – TAD/RKM**

Staff has been working with both Cuyahoga Community College's Corporate College Division (Tri-C) and Lorain County Community College regarding professional development and the introduction to continuous improvement. This has allowed staff to determine whom would be the best partner to help with moving the continuous improvement program to the next level through the implementation of the management program, ISO 9001.

From the experience to date, staff is most comfortable with the assistance and expertise of Tri-C to help implement ISO 9001 and other aspects of continuous improvement.

The attached proposal presents the scope and fee for Tri-C's engagement. The approximately 2.5 year project will begin with ground-laying work for the rest of 2018. During the late summer and fall, Tri-C will help staff with the strategic planning process and provide training regarding metrics, business skills, process improvement, and operating in teams. This will better prepare the organization for beginning implementation of the ISO 9001/55001 programs in 2019-2020. Tri-C will work with and train staff in order to become registered in ISO 9001 (the management standard) and conform with ISO 55001 (the asset management standard). Staff will work with Tri-C to select an outside auditor for the registration process (to be paid separately).

As staff works through the process and also works with the Department of Energy on the energy management initiative and becomes ISO 50001 (the energy management standard) ready, we will determine whether there is benefit in becoming registered in the ISO 50001 and 55001 standards and/or ISO 14001 (the environmental management standard).

Tri-C will provide these services to Avon Lake Regional Water for \$81,900, based upon the currently approved scope.

Tri-C representatives Samantha Kaplan (Director of Quality and Continuous Improvement), Tiffany Short (Director of Organizational Effectiveness), and Margarita Shulman (Project Manager) will provide a brief presentation to the Board during the work session and be available to answer questions.

The CUE and CUO met with Member Schnabel on Thursday to brief her on the intended path forward.



## TRAINING SERVICES AGREEMENT

This Training Services Agreement ("Agreement"), entered into on **July 3, 2018** (the "Contract Date"), by and between Corporate College, a division of Cuyahoga Community College ("Corporate College"), an institution of higher learning organized under Ohio Revised Code Chapter 3354, and **Avon Lake Regional Water** ("Client"), is for the delivery of training and/or other professional services as described herein. The parties hereby agree as follows:

1. **Description of Services.** Corporate College shall provide the training and/or other services described in the proposal provided by Corporate College to and accepted by Client (the "Proposal"). The Proposal is attached hereto as Exhibit A. Client shall complete the participant information sheet, attached hereto as Exhibit C, and provide a copy to the Corporate College Instructor or Project Manager on or before the first day of training (if applicable).
2. **Purchase Price.** The purchase price for the training and/or other services provided by Corporate College shall be \$81,900 subject to adjustment for the actual services performed.
3. **Payment Terms.** The purchase price shall be invoiced as follows:
  - a.) 25% upon signing of this Agreement; and
  - b.) The balance due in monthly increments through June 2019.

Invoices are payable within thirty (30) days of receipt. Checks should be made payable to "Cuyahoga Community College" and mailed to the attention of Contract Training, P.O. Box 92928, Cleveland, Ohio 44194.

4. **Early Termination of Contract.** In the event that all or part of this Agreement is cancelled or terminated because of a breach by the Client, Corporate College shall be entitled to payment of amounts due for effort expended and expenses incurred prior to the effective date of the cancellation or termination.
5. **No-Hire.** During the performance of this Agreement and for a period of two (2) years thereafter, the Client will not hire, engage or solicit either the instructors, facilitators or employees of Corporate College to provide training or any other services without the express written consent of Corporate College.
6. **Intellectual Property.** Corporate College is the exclusive owner of, or has the right to use all intellectual property rights associated with any curriculums, programs, courseware, documentation, methodologies, tools, reports, compilations, presentations, student guides or other materials, including, without limitation, derivative works, improvements or modifications thereto, (collectively, the "Course Materials") used by Corporate College in providing services under this Agreement. The Client hereby acknowledges that the Course Materials will remain the sole and exclusive property of Corporate College and the Client will have no interest in or claim to the Course Materials.

IN WITNESS WHEREOF, intending to be legally bound, the parties have caused this Training Services Agreement to be signed by their respective authorized representatives as of the Contract Date.

**Avon Lake Regional Water**

**Cuyahoga Community College District/Corporate College**

By: \_\_\_\_\_

By: \_\_\_\_\_

Print: \_\_\_\_\_

Print: Robert Peterson

Title: \_\_\_\_\_

Title: President/CEO, Corporate College

Date: \_\_\_\_\_

Date: \_\_\_\_\_

**Contact Information**

<p><b><u>Avon Lake Regional Water</u></b>          Todd Danielson, Chief Utilities Executive          201 Miller Road, Avon Lake Ohio 44012          Phone: 440-933-6226          E-Mail: <a href="mailto:TDanielson@avonlakewater.org">TDanielson@avonlakewater.org</a></p>	<p><b><u>Corporate College:</u></b>          Samantha Kaplan, Dir. Quality &amp; Continuous Improvement          4400 Richmond Road, Warrensville Hts., Ohio 44128          Phone: 216-987-2927          E-Mail: <a href="mailto:Samantha.kaplan@tri-c.edu">Samantha.kaplan@tri-c.edu</a></p>
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**FOR CORPORATE COLLEGE USE ONLY:**

<p><b>Bill To:</b>          Todd Danielson, Chief Utilities Executive          Avon Lake Regional Water          201 Miller Road, Avon Lake Ohio 44012          Phone: 440-933-6226          E-Mail: <a href="mailto:TDanielson@avonlakewater.org">TDanielson@avonlakewater.org</a></p> <p>Billing Terms: 25% upon signing of the signing of this Training Agreement; and then balance billed monthly through June 2019.</p>	<p>Org/Fund</p>	<p>4c/2140, 4c/1140</p>
	<p>Fee Code</p>	<p>F928/F058</p>
	<p>Instructional Lead</p>	<p>TBD</p>
	<p>Project Lead</p>	<p>S. Kaplan/T. Short</p>

Exhibit A

AVON LAKE REGIONAL WATER



**Avon Lake  
Regional Water**

Proposal for:

**PHASE II: Training and Implementation Services  
Team Dynamics, Business Skills, Strategic Planning,  
Understanding Metrics, Process Mapping and ISO 9001/  
integrated ISO 55001 Implementation**

Submitted by:

Corporate College, a division of Cuyahoga Community College  
Samantha Kaplan, Director of Quality and Continuous Improvement  
Tiffany Short, Director of Organizational Effectiveness  
July 3, 2018

**CORPORATE COLLEGE**  
A DIVISION OF  
CUYAHOGA COMMUNITY COLLEGE



*Premier Training and Conference Centers*

## OVERVIEW

Avon Lake Regional Water (Avon Lake) is a progressive water and wastewater utility in Avon Lake, Ohio providing water services to over 200,000 residents living in the seven-county area surrounding Avon Lake and sanitary sewer services to about 30,000 residents living in Avon Lake and parts of Lorain county.

Avon Lake Regional Water aims to continually align organizational goals with a widely recognized water sector utility management program based around the Ten Attributes of an Effectively Managed Utility and Five Keys to Management Success—known as Effective Utility Management (EUM). The organization also wishes to continue and expand training in the areas of process mapping, business writing, public speaking, understanding metrics and strategic planning.

In addition, the Ohio EPA recently modified the asset management regulation that outlines additional requirements that need to be incorporated into the strategic plans of the organization. In order to achieve those goals Avon Lake Regional Water requested Corporate College to propose a solution that will support their process.

Based on an in-depth review of the EUM as well as the draft asset management regulation, the Corporate College proposes that Avon Lake Regional Water pursue an ISO 9001 Quality Management Certification while incorporating ISO 55001 Asset Management components to ensure that both the EUM recommendations and regulation requirements are met. Both ISO tracks focus strongly on the self-assessment and continuous improvement, customer satisfaction, product quality, and operational optimization, strongly aligning with Avon Lake Regional Water compliance and improvement goals.

## PROGRAM - CONTINUAL TRAINING

### Individual Contributor Training Track

Corporate College recommends 3-hours of team effectiveness training, targeted to all employees.

This training is designed to discuss the importance, development, and interactions within teams.

This module aims to expand on the previous Team Dynamic training that employees received earlier this year.

Competency	Course Module	Module Objectives	Duration
Team Dynamics and Collaboration	Team Chemistry	<ul style="list-style-type: none"><li>• Determine the fundamentals for establishing a team.</li><li>• Develop a team charter and project plan.</li><li>• Clarify team roles and personality types.</li><li>• Leverage the strengths of team members to maximize team performance.</li><li>• Implement strategies to promote positive interactions.</li><li>• Evaluate team processes and team results.</li></ul>	3 hours



**Leadership Training Track and Understanding Metrics**

Corporate College recommends 12-hours of Leadership and 4-hours of Understanding Metrics training. These courses aim to provide deeper skill and behavior development in the areas of business acumen, communication and presence, understanding metrics and strategic thinking.

Competency	Course Module	Module Objectives	Duration
Business Skills and Acumen	Advanced Professional Business Writing*	<ul style="list-style-type: none"> <li>• Understanding the Basic Communication Model.</li> <li>• List and describe the main parts of speech.</li> <li>• Make distinctions between words often confused.</li> <li>• Identify common grammar guidelines that should always be used when writing work-related emails, reports or other documents.</li> <li>• Write without making the most common mistakes.</li> <li>• Identify delicate situations and how they should be handled appropriately.</li> <li>• Write a clear, concise email to a co-worker, superior, or client.</li> <li>• Develop efficient writing habits.</li> <li>• Communicate clearly and with confidence.</li> <li>• Manage challenging situations and audience questions.</li> <li>• Learn composure techniques to overcome anxiety.</li> </ul>	8 Hours (Two (2) half-day sessions)
Analyzing Metrics	Understanding Performance Metrics for Strategic Deployment**	<ul style="list-style-type: none"> <li>• Explore the foundational principles of performance metrics.</li> <li>• SMART Metrics</li> <li>• Use practice to build skills in defining and using metrics.</li> <li>• Define actions that can be taken to apply meaningful metrics in the organization.</li> <li>• Provide objective results that can be utilized to make informed decisions.</li> <li>• Create solution-driven presentations for your audience.</li> </ul>	4 hours
Strategic Thinking (Pre-requisite to Workshop)	Executing Strategy at the Frontline	<ul style="list-style-type: none"> <li>• Maintain focus on important work in the midst of the daily pressure of business.</li> <li>• Explain the importance of critical work to their team and others.</li> <li>• Track progress and outcomes against relevant measures to ensure successful execution.</li> <li>• Communicate accountabilities so that the team members understand the importance, impact, and expectations regarding priority work.</li> </ul>	4 Hours

\* The Advanced Professional Business Writing course will be delivered in two 4-hour sessions. These sessions can be delivered over consecutive days based on Avon Lake Regional Water's preferences.

\*\* A Pre-assessment Survey for the Understanding Metrics Workshop will be submitted to participants approximately 1 to 2 weeks prior to the training session.

### **Strategic Planning Facilitated Workshop - 8 hours**

Strategic planning, development, implementation and execution are at the core of organizational leadership and management functions – for two very important reasons. First, a clearly defined, reasoned and articulated strategy is the leader’s prescription for conducting its business, its road map for competitive advantage, its game plan for engaging stakeholders, and its approach for improving its organizational or cultural performance. This one-day facilitated session will walk leaders of Avon Lake Regional Water through a formal process to:

- Define the big picture
- Align priorities with goals
- Use business acumen to plan and measure outcomes
- Leverage customer insights to plan and change as needed
- Evaluate alternatives, issues and potential risks

#### **Outcomes**

- Consensus on key business priorities and goals
- High-level road map for the next 1-2 years
- Monitoring tools to manage progress against the strategic plan

*This session can be delivered off-site at Corporate College Westlake, based on Avon Lake Regional Water’s preferences.*

### **Process Mapping Workshop with Coaching – 16 hours (4 hr. segments)**

This Process Mapping Workshop (8-hr) is for select individuals to continue to work on process maps for the organization. Initial process mapping was started in Q1/Q2 of 2018 as part of the Process Improvement and Professional Development Initiative. We will train and facilitate key personnel so that they can become in-house process mapping facilitators for the organization.

Process maps enable organizations the opportunity to peel away complex organizational structures and focus on the processes that are truly at the heart of business. Armed with a thorough understanding of the inputs, outputs, and interrelationships of each process, the organization can continue to:

- Understand how processes interact in a system;
- Mobilize teams to document, streamline and improve processes.
- Understand and identify areas for process improvement
- Mobilize for process change and quality improvement (ISO 9001/ISO 55001)

#### **Outcomes**

- Define the big picture process maps and expand the existing “current state” to include “future state”
- Determine measurements for processes
- Understand how to prepare and facilitate a small team who will map processes
- Documented Information that is pertinent to ISO 9001/ISO 55001

The Coaching (8-hrs) will provide the expert support of the instructor/facilitator(s) to assist with initial process mapping as well as provide consultation as the organization experiences growing pains (observations/corrective actions); which is expected during any organizational initiative. Corporate College can review process maps, assist with the mapping process to reinforce or coach.

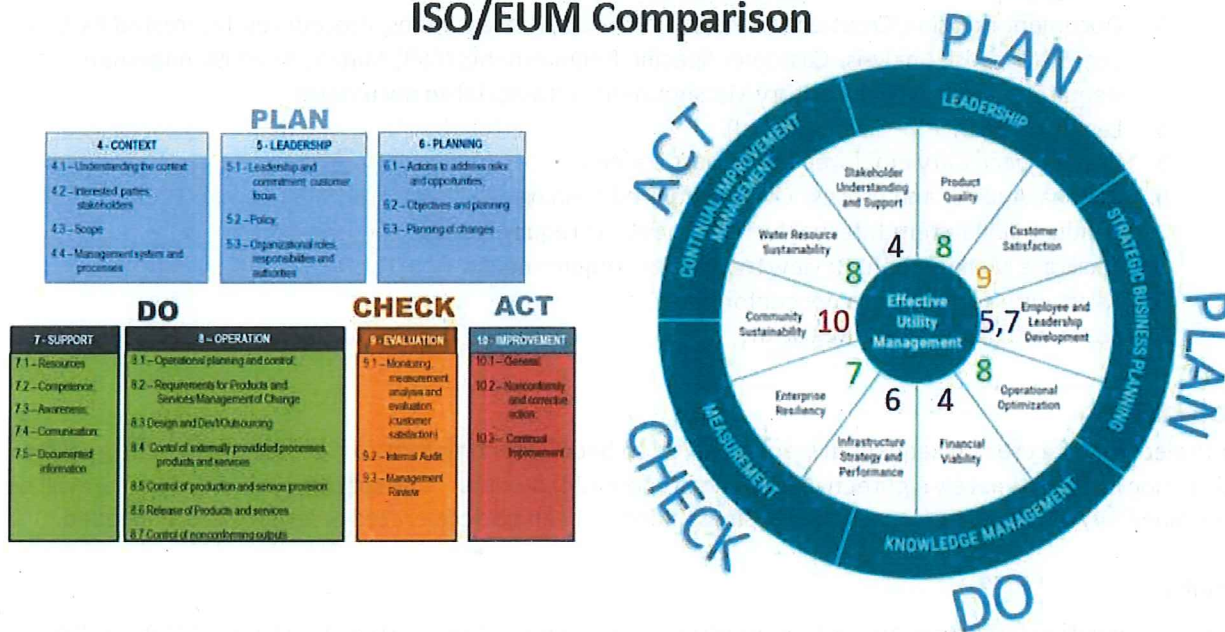
## PROGRAM - ISO 9001/55001 BUSINESS MANAGEMENT SYSTEM

Implementing a quality initiative of any kind is a huge undertaking for any organization seeking business improvement. Management commitment and planning can push the process along, but many organizations need help along the way. Corporate College can aid in the implementation and training process for Avon Lake Regional Water quality initiative. Our goal is to make sure that Avon Lake Regional Water, as an organization, feels comfortable with these new standards, tools and methodologies.

### Goals for Avon Lake Regional Water

- ISO 9001 compliance (registration) with ISO 55001 integration (conformance)
- Ensure alignment with the attributes of an Effectively Managed Utility (EUM)
- Incorporate Asset Management Program framework (ISO 55001) to align with the State of Ohio Asset Management regulations (currently in draft)
- Educate throughout the process

## ISO/EUM Comparison



## SOLUTION

Program Options	Timing
ISO 9001 Implementation with integration of ISO 55001	Refer to Project Plan Deliverables and Implementation Plan

Please Note:

We at Corporate College offer a turnkey approach to implement and meet an ISO 9001:2015 Certification and/or other customer specific-requirements that include compliance to ISO 55001 concepts and State of Ohio Senate Bill #2 requirements. Even though it's turnkey, we do not sacrifice the benefits of treating your implementation project with a training emphasis.

Some of the components of our approach include the following:

1. Gap analysis of the current system against future requirements.
2. ISO 9001:2015 and ISO 55001 Overview for Leadership and the Implementation Team (final issue of Senate Bill).
3. Document Revision/Creations to include: Manual, Process Maps, Procedures, Interested Parties Log, SWOT, Risk Analysis, Customer Specific Requirements (CSR) Matrix, Asset Management Requirements Matrix, Inventory Management and associated documents.
4. Legal Compliance review (optional)
5. Provide necessary employee awareness training.
6. Internal Auditor and Process Owner required training.
7. Conduct Full-System Internal Audit to meet ISO requirements.
8. Facilitate Management Review to meet ISO requirements.
9. Assist with correction to nonconformities.
10. Assist with Selection of Registrar.

### Project Plan

Our Project Plan focuses on sequential steps required to becoming compliant to ISO 9001:2015. The goal for registration is approximately eighteen (18) to twenty-four (24) months. The specific time and duration will be determined by Avon Lake Regional Water business needs. It can be accelerated or lengthened as needed.

### Benefits

- Recognition by current and potential customers that comes from certification to the ISO 9001:2015 Standard and compliance to ISO 55001:2014 and Senate Bill 2.
- Avon Lake Regional Water will have a team in place to help maintain and sustain the program and continually improve the workplace (process owners).
- Will achieve a level of consistency in the implementation of ISO 9001:2015 (standard work)
- Through a standard consistent approach, aids major organizational changes.
- Encourages the strengthening and building of teams to address process improvement issues.
- Recognition by current and potential customers as well as stakeholders that comes from certification to the ISO 9001:2015 standard.

## Project Plan Deliverables

1. **Gap Assessment Evaluation of ISO 9001/ISO 55001/Senate Bill 2 Requirements:** Defines requirements needed to be auditable for qualifying for third party audit/registration. This provides a picture of the company's overall current performance and condition versus requirements for certification.
2. **Preparation of necessary Quality Documentation:** Development/upgrade of Manual, Procedures and Process Maps to meet ISO and other requirements. This may also include documentation reviews and interviews with personnel. Documentation to include: Internal/External Interested Parties, SWOT Analysis, Risk Analysis Matrices, Asset and Inventory Management, etc. The documents will include simple, easy to understand procedures and flowcharts needed to define the quality management system.
3. **Process Owner Training:** Training with Process Owners regarding ISO and other requirements for Customer Specific Requirements (CSR), Asset and other requirements. This will include the Executive Management and Leadership team. This provides a backdrop to help the organization understand ISO and the implementation steps which need to be accomplished, and the approach of the ISO requirements.
  - Documentation/record generation and retention
  - Control of non-conforming product/processes
  - Corrective Action
  - Management Reviews
  - Audits

Training records will be generated to satisfy requirements for employee competence. Risks and opportunity assessments will be performed and documented as required.

4. **Finalize all Quality Objectives and Related Policies and Performance Targets:** Review of the Quality and Asset Management Objectives (measurable/metrics) and Related Policies to ensure quality and asset management objectives meet customer requirements as defined, established and maintained.
5. **Finalize Internal and External Document Listing:** Review of the interested parties and any internal and external document requirements (Stakeholders).
6. **Identify Key Equipment, Assets and Inventory, PM and Contingency Plan:** Review of the key equipment utilized (inventory), maintenance, Asset Management and Contingency Planning (equipment failure, fire, utility, labor, and testing of such).
7. **Develop/Complete Training Matrix to include Orientation and On-the-Job Training (OJT)**  
Review of organizational knowledge and competence (OJT and Customer Requirements training), Auditor Competency, Awareness and Employee Motivation. Appropriate employees will be trained.
8. **Finalize the Calibration Program:** Review and upgrade of the existing calibration program and potential laboratory requirements.
9. **Finalize the Supplier/Vendor Program:** Review and upgrade of the Supplier/Vendor Management and selection process; criteria, type and extent of control, supplier quality management system development, supplier/vendor monitoring.

10. **Internal Auditor Training:** ISO Internal Auditor training for select participants.  
Note- the organization must perform QMS and AMS Audits.
11. **Full System, Internal Audit:** A formal, internal audit of compliance to ISO 9001 and ISO 55001 requirements will be conducted by Corporate College Auditors. The organization will use the audit report of any nonconformities to identify corrective actions required to achieve compliance. It is suggested that the organization's audit team shadow (if applicable) in this process so that they can gain the necessary experience and understanding of the process. Qualified, experienced auditors, will be conducting the internal audit.
  - To verify the system has been implemented and is effective;
  - Corrective action will be taken on findings, if any, to ensure all requirements have been met.
12. **Management Review:** Coach and facilitate the initial Management Review(s). It is conducted to ensure all Management Review Inputs and Outputs, including quality objectives are documented and satisfactorily completed.
13. **Assist with Correction to Nonconformities:** Assist in areas where there were findings, evaluation of corrective actions taken, and close-out of nonconformities. End state goal is intended to be compliant to ISO 9001 with ISO 55001 add-ons.
14. **Selection of a Registrar and Final Preparation for Certification Assessment:**
  - Potential registrars will be identified from whom Avon Lake can choose to obtain a contract for registration service.
  - All employees will receive training and coaching in advance of the registrar's assessment audit.
  - If there are any nonconformance findings by the registrar, then Corporate College and its consultant(s) will assist in generation corrective actions needed to meet certification requirements.
  - When this step is complete, Avon Lake will receive certification by registrar and will be able to share their certificate with customers and other interested parties.

Please note: Registrar fees are a separate expense and not included. The company is responsible for getting quotes, selecting the registrar and negotiating fees and the various project dates directly with the registrar of choice.

### SAMPLE ISO IMPLEMENTATION PLAN

ACTION STEP	Responsibility	2019												2020											
		JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUNE	JULY	AUG	SEPT	OCT	NOV	DEC
Conduct Gap analysis to establish current condition versus ISO 9001, 55001 and Senate Bill 2 requirements	Tri-C and Avon Lake Team	X	X																						
Prepare Quality Documentation (Manual Procedures and Process Maps) to meet ISO and other requirements	Tri-C and Avon Lake Team			X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	
Training with Process Owners and Leadership regarding ISO and other requirements	Tri-C and Avon Lake Team			X	X	X				X	X									X					
Finalize all quality objectives and related policies and performance targets (metrics/data)	Tri-C and Avon Lake Team							X	X																
Finalize Internal and External document listing	Tri-C and Avon Lake Team							X	X	X															
Identify Key Equipment, Assets, Inventory, PM and Contingency Plans	Tri-C and Avon Lake Team				X	X	X	X	X	X															
Develop/Complete Training Matrix to include Orientation and OJT, Train appropriate Employees	Tri-C and Avon Lake Team									X	X														
Finalize Calibration Program (any laboratory requirements)	Tri-C and Avon Lake Team										X	X													
Finalize Supplier / Vendor Program	Tri-C and Avon Lake Team											X													
Train Internal Auditors	Tri-C and Avon Lake Team											X													
Conduct Second Party Full Systems Internal Audit	Tri-C and Avon Lake Team												X	X											
Facilitate Management Review	Tri-C and Avon Lake Team													X											
Assist with correction to nonconformities	Tri-C and Avon Lake Team														X	X	X	X							
Assist with Selection of Registrar	Tri-C and Avon Lake Team											X	X												
Assist with correction to nonconformities from Registration Audit	Tri-C and Avon Lake Team																				X				

The goal for registration is approximately eighteen (18) to twenty-four (24) months. The specific time and duration will be determined by business needs.

## INVESTMENT

Program	Number of Participants	Number of Sessions	Additional Cost/Person Over Allotted	Investment
Individual Contributor Training Track	Up to 40	3	\$50	\$3,000
Leadership Training Track	Up to 15	3	\$375	\$6,500
<b>Sub-Total Investment</b>				\$9,500
Strategic Planning Session (1-day session)	Up to 15	1	\$400	\$6,400
<b>Sub-Total Investment</b>				\$6,400
<b>Total Investment</b>				<b>\$15,900</b>

Program	Number of Participants	Number of Sessions	Additional Cost/Person Over Allotted	Investment
Understanding Performance Metrics	Up to 15	1	\$125	\$2,000
Process Mapping Workshop and Coaching	Up to 10	4	\$300	\$4,000
<b>Sub-Total Investment</b>				\$6,000
ISO 9001/55001 Implementation	Up to 40	Multiple	N/A	\$60,000
<b>Sub-Total Investment</b>				\$60,000
<b>Total Investment</b>				<b>\$66,000</b>

If additional services are required outside of the services and hours listed here, they will be agreed to by Avon Lake and Corporate College and will be invoiced at \$225 per hour.

The roll out schedule of the training modules is at the discretion of Avon Lake Regional Water. Specific dates will need to be determined based on an agreed upon schedule between Avon Lake Regional Water and Corporate College.

### Corporate College will deliver:

- Training rooms available at Corporate College (No additional charge)
- Training delivery and associated materials
- Post evaluations

### Avon Lake Regional Water will provide:

- Pre-populated training rosters for each training session, 14 days in advance of session
- Facility space for class delivery, computer/AV equipment, and flip charts (if training is not hosted at a Corporate College facility)

Corporate College will provide authorized training materials. Qualified, experienced and certified facilitators with excellent credentials will conduct the workshop(s).



For all contract training conducted at a Cuyahoga Community College's Corporate College, location, the meeting space, flip charts, markers, projector, and screen will be provided. For all sessions conducted at Avon Lake Regional Water, the client should provide the meeting space, flip charts, markers, projector and screen, if applicable.

*If you wish to have your event catered breakfast/lunch/beverages on-site catering is provided by our award winning catering partner A Taste of Excellence. Our event planning team will work with you to plan your catering details.*

Pricing is based upon the assumptions provided. Final cost is determined by actual services provided. Scheduling changes can be made 14 days in advance of training session to accommodate low course enrollment and/or business priorities. Changes made after this date may be subject to additional charges for time expended and/or expenses incurred by the College. Training cancellations must be rescheduled (newly agreed upon date) within 30 days of the original training date in order to secure instructor availability. Pricing is based upon the assumptions provided. Final cost is determined by actual services provided.

This proposal and associated fees are valid for 30 days from the proposal date.

**Contact Information**

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**Exhibit B**

**APPENDIX**

**Table: Comparison Chart**

Recommendation/Requirement	EUM/S.B. 2	ISO 9001	ISO 55001	Leadership Professional Development	Process Improvement
Product Quality	EUM	X			X
Customer Satisfaction	EUM	X		X	X
Employee and Leadership Development	EUM	X	X	X	X
Operational Optimization	EUM	X	X		X
Financial Viability	EUM		X		
Infrastructure Strategy and Performance	EUM	X	X	X	X
Enterprise Resiliency	EUM	X	X	X	X
Community Sustainability	EUM	X			
Water Resource Sustainability	EUM	X			
Stakeholder Understanding and Support	EUM	X	X	X	X
Continual Improvement Management	EUM	X	X		X
Leadership	EUM	X	X	X	X
Strategic Business Planning	EUM	X	X	X	
Knowledge Management	EUM	X	X	X	X
Measurement	EUM	X	X		X
Asset Management Program Description	S.B. 2	X	X		
Managerial Capacity and Personnel Commitment	S.B. 2	X	X	X	X
Documentation of ownership accountability	S.B. 2	X	X		X
Documentation of proper operation and management	S.B. 2	X	X		X
Operating Plan	S.B. 2	X	X	X	
Ability to address violations	S.B. 2	X	X		
Inventory of external contacts and resources	S.B. 2	X	X		
Contracting and purchasing procedures	S.B. 2	X	X		
Supporting documentation	S.B. 2	X	X		X
Technical Capacity	S.B. 2	X	X		
Schematic of water source, treatment, storage, distribution	S.B. 2	X	X		X
Inventory of all assets	S.B. 2	X	X		
Evaluation of all assets	S.B. 2	X	X		
Operation and maintenance programs	S.B. 2	X	X		
Emergency preparedness and contingency planning	S.B. 2	X	X		
Source water protection	S.B. 2		X		
Capacity Projections	S.B. 2	X	X		
Criteria and timelines for infrastructure rehabilitation	S.B. 2	X	X		
Capital Improvement Plan	S.B. 2	X	X		
Financial Capacity	S.B. 2		X		
Five year statement of operation	S.B. 2	X	X		
Financial report	S.B. 2		X		
Budget and cost	S.B. 2		X		X
Long Term Implementation	S.B. 2	X	X		
Annual Review	S.B. 2	X	X		
Metrics Tracking	S.B. 2	X	X		X
Customer focused	S.B. 2	X		X	X

# Timeline

Avon Lake Regional Water Training Schedule 	2017				2018				2019				2020													
	Oct	Nov	Dec	Q4	Jan	Feb	Mar	Apr	May	Q1	Q2	Q3	Q4	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
<b>Phase I</b>																										
Handling Change	18-Oct																									
Developing Positive Relationships at Work		8-Nov																								
Accountability at Work		13-Dec																								
Effective Communication			17-Jan																							
Listening With Intent			31-Jan																							
Introduction Lean Office & Service, Eight Wastes				7-Feb																						
Lean 5S plus Safety				28-Feb																						
Team Development					14-Mar																					
Process Mapping					28-Mar																					
Delivering Great Customer Service						11-Apr																				
Standard Operating Procedures						18-Apr																				
Facilitated Mapping Sessions							9-May																			
Facilitated Mapping Sessions							16-May																			
<b>PHASE II</b>																										
Team Chemistry																										
Advanced Business Writing/Presentation Skills																										
Dynamic Presentation Skills																										
Understanding Metrics																										
Executing Strategy at the Frontline																										
Strategic Planning Workshop																										
Process Mapping																										
Business Management System Implementation ISO 9001/ISO 55001																										

**Exhibit C**

**Participant Registration Information**

Company Name: \_\_\_\_\_

CRN: \_\_\_\_\_

Company Address: \_\_\_\_\_

Start Date: \_\_\_\_\_

Course Title: \_\_\_\_\_

End Date: \_\_\_\_\_

Instructor Signature: \_\_\_\_\_

Participant Count: \_\_\_\_\_

	Participant Name (*Note: Please print legibly)	Email Address: Certificates and Surveys are delivered electronically, please print legibly	DOB (month/day/year) (For Contract Training Use Only)	Grades (Pass, No Pass)
1				
2				
3				
4				
5				
6				
7				
8				
9				
10				
11				
12				
13				
14				
15				
16				
17				
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