

Water System Partnerships Training Workshop

Partnerships Action Plan Exercise



In this exercise, you will begin to develop an Action Plan to implement one of the partnership opportunities (Opportunity A or Opportunity B) you identified in Part 2 of Module 6: Expanding Partnerships. The purpose of this exercise is to document the plans for the partnership including the possible stakeholders, benefits, and considerations. This individual Partnerships Action Plan can be incorporated into your water system's broader planning efforts. Example Implementation Steps are included at the end of this exercise as a resource for completing Part 5, Partnership Implementation Schedule.

The five components of an Action Plan detailed in this exercise are:

- 1) [Proposed Partnership Information](#)
- 2) [General Contacts](#)
- 3) [Champions, Allies, and Stakeholders](#)
- 4) [Considerations to Implement a Partnership](#)
- 5) [Partnership Implementation Schedule](#)

If at any time you are having trouble filling out this worksheet, please reach out to workshop facilitators, organizers, or other support personnel for help.

1) Proposed Partnership Information (Opportunity A or Opportunity B)

The information in this section can be used to create an introduction for the Action Plan to provide key background information and key players.

Challenge to address:

Activity:

Partner(s):

Point of Contact (your information):

2) General Contacts

List out the contacts for each category below and fill-in discussion points for each. Consider the key points you want to communicate to each contact including why the partnership is a good solution, any incentives for the partnership, feasibility, and more. Refer back to Module 2 of the workshop slide deck to review specific partnership benefits that may resonate with different audiences.

- **Your water system’s decision maker(s):** Who will need to be contacted to discuss forming the partnership? How could they play a part in the partnership process? What information do they need in order to understand the partnership’s benefits and approve next steps?
- **Potential partners:** Who at the potential partner organization do you need to contact to discuss forming the partnership? What reservations could they have about partnering? How can you address their possible concerns?

Category	Contact Name and Affiliation	Discussion Points
Your water system’s decision maker(s)		
Potential partners		

3) Champions, Allies, and Stakeholders

To improve communication and partnership success, various stakeholders and other support groups can be engaged to help build relationships and gain support for the partnership. Use the table below to brainstorm a possible champion as well as allies and stakeholders to be involved with this partnership. Additional champions, allies, or stakeholders can be added using the blank rows at the end of the table. General descriptions of each role are described below. Refer back to Module 7 of the workshop slide deck for possible examples of each.

- **Champion:** A strong proponent of the partnership, preferably a local leader. Someone who can propose, endorse, encourage, and defend the partnership ideas.
- **Ally:** They provide support in communicating about the project to the local community. Someone who already has the public’s trust or who is already working closely with the water systems.
- **Stakeholders:** They may or may not be proponents of the partnership. If appropriate, engage them in facilitated discussions to understand different types of stakeholders and their concerns or perspectives early on in the process.

Role	Contact Name and Affiliation	Discussion Points
Champion		
Ally		
Ally		
Stakeholder		
Stakeholder		

4) Considerations to Implement a Partnership

Now consider the feasibility of moving forward with the partnership. The information provided below should be included in the Action Plan.

1. How will this partnership address a particular challenge or increase TMF capacity?

2. What might make this organization a good partner?

3. How will the other partner benefit from this activity?

4. What will make this new partnership a success?

5. What are some possible challenges to implementing the partnership?

6. For each challenge, consider and propose a solution that either or both parties could implement.

Water System Partnerships Training Workshop: Partnerships Action Plan Exercise

7. What resources are available to support and sustain the partnership?

8. What, if any, examples are there of other partnerships that might provide helpful lessons learned?

9. How long will you be willing to make a commitment to the partnership?

10. Have there already been some studies or regional planning efforts that could provide information for the communities on water sources, availability, and quality issues?
 - a) Yes
 - b) No

11. Have the entities (or their engineering and financial consultants) done any preliminary studies on options or costs for the activities you are considering?
 - a) Yes
 - b) No

12. Could you and your team help set up a workshop or training with the champions or allies that the water systems already trust and work with?
 - a) Yes
 - b) No

5) Partnership Implementation Schedule

Fill in the table below to start organizing a schedule to implement your partnership. Use the first column to identify each step and the middle column to explain your role in each step. On the next page are example steps that you may choose to add to the table if they are applicable to your partnership. Carefully consider the order to implement each step to make sure you're following a schedule that works for your scenario and partners. Review the example implementation steps on the following page for suggestions.

Step in Forming Partnership	Additional Information on Water System Role	Order to Implement
		1st
		2nd
		3rd

Example Implementation Steps

- **Gain buy-in and build trust:** Shared activities, open communication, and developing relationships with personnel are important steps to convince potential partners that a partnership will result in mutual benefit. This is an ongoing process that may take some time.
- **Develop a business plan:** Focus on areas where there may be ways to reduce redundancy of managerial and financial operations. The business plan should provide guidance, tips, resources, and tools to use in the partnership as well as information provided in this Action Plan.
- **Obtain the necessary approvals:** If any of the participating water systems are privately/investor owned, state PUC approval may be required.
- **Obtain financing:** Secure grants or loans to help facilitate partnerships. Investigate financing sources to minimize the impact on the local ratepayer. Understand funding procedures and how other water systems have utilized funding for partnership.
- **Approve plans and specifications:** If part of the partnership involves engineering changes, a plan review is usually required.
- **Identify sources of technical assistance:** Contact and obtain necessary technical assistance from providers who are willing to help in the partnership effort.
- **Support regional planning activities:** Hold community meetings to gain buy-in for partnership options and to educate others on how the partnership will help the water systems overcome present and future challenges.