

**PURC Advanced International Practices Program – Benchmarking Infrastructure Operations  
August 5 – 8, 2019 – Gainesville, Florida**

**Monday, August 5**

**Tuesday, August 6**

**Wednesday, August 7**

**Thursday, August 8**

<p><u>Session 1</u> 9:00 - 10:30 <b>Overview of Program</b> <b>Sanford Berg</b> Understanding the political economy of benchmarking; who supports benchmarking; who is threatened by comparisons; how can studies be misused; sources of conflict and sector performance: the role of evidence</p>	<p><u>Session 5</u> 9:00 - 10:45 <b>Alternative Methodologies for Measuring Performance</b> <b>Sanford Berg</b> Beyond key performance indicators; Metrics and productivity trends; statistical analysis (OLS and COLS); data envelopment analysis (DEA), and Stochastic Frontier Analysis (SFA). Strengths and Limitations of alternative methodologies.</p>	<p><u>Session 9</u> 9:00 – 10:45 <b>Case 5: Utilizing Available Software--DEA</b> <b>Ted Kury</b> Using data from cases 1 and 3, participants will develop performance indicators; results will be shared and evaluated; what are the strengths and limitations of statistical methods?; how sensitive are results to selection of inputs and outputs?</p>	<p><u>Session 13</u> 9:00 – 10:45 <b>Performance Assessment and Performance Improvement</b> <b>Sanford Berg and Ted Kury</b> Data acquisition and validation; best practice examples; pre-analysis (clustering, sensitivity analysis, KPIs); tables, scatter diagrams, figures; studies with data from participants. Implications for different stakeholders. Service quality and cost. Awards: top performers most improved.</p>
<p><u>Session 2</u> 11:00 – 12:30 <b>Case 1: Selecting Data</b> <b>Ted Kury</b> Productivity, efficiency and effectiveness; identifying inputs and outputs, stocks and flows; prioritizing data needs; implications of partial, limited or incorrect information; conditioning and environmental variables. Legal authority for data collection.</p>	<p><u>Session 6</u> 11:00 - 12:30 <b>Case 4: Utilizing Available Software: Statistical Analysis</b> <b>Ted Kury</b> With data from cases 1 and 3 participants will utilize the Analysis ToolPak in Microsoft Excel to estimate productions and cost functions; evaluating analyses; what are the strengths and limitations of statistical methods?; how sensitive are results to model specifications?</p>	<p><u>Session 10</u> 11:00 – 12:30 <b>Case 5: Continued – Group Work</b> <b>Ted Kury</b> Participants will utilize DEA software to compute performance scores for the sample utilities; specifications of cost and production relationships will be evaluated</p>	<p><u>Session 14</u> 11:00 – 12:30 <b>Case 6: Communicating Results</b> <b>Sanford Berg and Ted Kury</b> Should the analyst present scores or rankings?; who are the different audiences for performance studies?; each team will prepare a Press Release or Executive Summary for a different audience (sector ministry, regulator, top management, the press, consumer’s association)</p>
<p><u>Session 3</u> 1:30 – 3:00 <b>Case 2: Confidence in Performance Comparisons</b> <b>Sanford Berg</b> Additional inputs and outputs; additional years (trends); context and governance variables; introduction to robust comparisons. Moving from KPIs to Overall Performance Indicators.</p>	<p><u>Session 7</u> 1:30 – 3:00 <b>Case 4: Continued – Group Work</b> <b>Ted Kury</b> Each participant will practice using Analysis ToolPak in Microsoft Excel to analyze the efficiency of utilities in the sample; results of different specifications will be used to strengthen abilities to interpret empirical results</p>	<p><u>Session 11</u> 1:30 – 3:00 <b>Benchmarking Studies: Engaging Stakeholders</b> <b>Sanford Berg and Ted Kury</b> Participants will develop stakeholder maps, identifying groups with high/low influences and high/low interest in improving sector performance. Opponents of change will be identified.</p>	<p><u>Session 15</u> 1:30 – 3:00 <b>Action Plans</b> <b>Araceli Castaneda</b> Presentation of individual Action Plans; think strategically about your relationships; develop a system of accountability; give and receive critical feedback</p>
<p><u>Session 4</u> 3:15 – 5:00 <b>Case 3: Back to the Basics</b> <b>Sanford Berg</b> Data definitions; Total Factor Productivity (TFP); evaluating company information systems (sensors, data capture, data consistency, storage, analysis, decisions); checklist for conducting benchmarking studies</p>	<p><u>Session 8</u> 3:15 – 5:00 <b>Review of Statistical Analyses</b> <b>Ted Kury</b> Determining scale economies; economic vs. statistical significance; evaluating the robustness of results</p>	<p><u>Session 12</u> 3:15 – 5:00 <b>Using Benchmarking Results</b> <b>Sanford Berg and Ted Kury</b> Public awareness (transparency and public acceptance/legitimacy); internal incentives (efficiency); regulatory incentives (effectiveness); price reviews (x-factors); baselines, trends and targets</p>	<p><u>Session 16</u> 3:15 – 5:00 <b>Next Steps and Key Lessons</b> <b>Sanford Berg</b> Current capabilities; adequacy of data system; developing strategic plans for engaging allies, opposition and other important players; next steps for your organization; prerequisites to successful benchmarking; planning the next study</p>