

Getting Ready for CUPSS

An Introduction for the CUPSS Trainer's Network



Welcome to the CUPSS Trainer's Network

- Goals of presentation:
 - Understand your role as a trainer
 - Become familiar with support provided by EPA and the Trainer's Network
 - Tips for a trainer's success



The goals of this presentation are to:

- Understand your role as a trainer, whether you are delivering the presentation, managing logistics or helping to expand the network;
- Detail the support from EPA and the Trainer's Network you will have as a trainer; and
- Provide tips for success as a CUPSS trainer.

Agenda

- About asset management
- How Check Up Program for Small Systems (CUPSS) can manage assets
- Preparing users for CUPSS
- Training CUPSS users
- Evaluating training efforts



- Understanding what asset management means to small utilities
- How CUPSS can help assist with the management of small drinking water and wastewater systems
- Preparing utilities for using CUPSS
- Training users on how to use CUPSS
- Evaluating CUPSS training efforts

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-Understanding what asset management means to small utilities

Asset Management

“A process for maintaining a desired level of customer service at the best appropriate cost.”

- Why manage water and wastewater utility assets?
 - Managing assets will help a utility be more efficient and financially self sufficient



Managing assets includes determining when to repair, rehabilitate, or replace them.

Why manage assets? At some point, continuing to repair the asset will no longer be cost-effective and it will need to be rehabilitated or replaced. A water or wastewater system should be financially ready to do so when the time comes to repair or replace an asset.

EPA's Involvement With Asset Management

- Saw need for small system Asset Management training
- Success with Asset Management guidance documents
 - Build on Asset Management STEP Guides and Card File
- Ultimate goal is protection of public health and efficient, sustainable utilities



Asking the right questions

- Current state of my assets?
- What is the desired “sustainable” level of service?
- What assets are critical to sustained performance?
- What are the best minimum life-cycle-costs and O&M strategies?
- What is the long-term financing strategy?



To achieve these ultimate goals, managing assets starts with asking the right questions.

1. Inventory (What is the current state of my assets?)

- Condition
- Age
- Value
- Useful life

2. Service history (What is my desired “sustainable” level of service?)

- Customer demand
- Regulations
- Physical capabilities of assets

3. Prioritize (Which assets are critical to sustained performance?)

- Criticality (public health, safety concern)
- Redundancy, importance

4. Develop Maintenance Plan (What are my best “minimum life-cycle-cost” capital improvement plan and my best operations and maintenance strategies?)

- Feasible strategies for your operation
- Alternative strategies

5. Develop Financial Plan (What is my best long-term financing strategy?)

- Revising rate structure
- Create reserve from current revenues

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Those questions are not the easiest to answer, for any size of utility. Now we will explore how CUPSS will help small systems begin to find some of those 'right answers'.

What is CUPSS?

- Free Asset Management tool
- 'Desktop software' – program that runs on your computer
- Series of modules that store information about a user's utility
- Tool designed and developed with input from well-rounded stakeholder group



We realize asset management is a big job, a huge challenge for any size of system. It is even hard for small systems.

-Check Up Program for Small Systems (CUPSS)

-Free software that will make managing assets easier.

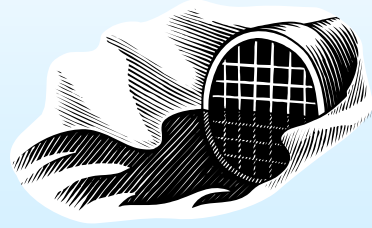
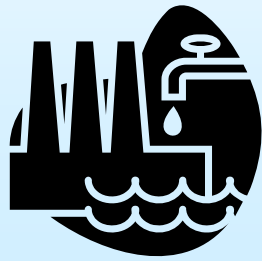
-A desktop system. The user does not need an internet connection to use CUPSS, just a computer.

-Series of modules will help organize and develop a plan for the physical health of all the tangible parts (assets) of your water system – from pipes to pumps – as well as the financial health of a system's bank account.

-Tool designed and developed with input and suggestions from well-rounded stakeholder group.

Who Should Use CUPSS?

- Small drinking water and wastewater systems
- Medium-sized systems new to Asset Management



CUPSS is designed with small systems in mind, but will be useful for any utility wanting to get their feet wet with asset management.

Using CUPSS to Manage Assets

- Helps in understanding the **asset management process**
- Establish and keep track of **goals and milestones**
- Become more **organized** by keeping all information in one place



-CUPSS promotes the integration of asset management activities into utility practices.

-CUPSS will help identify what a utility team is already doing well. CUPSS will also help identify areas of improvement. The utility will be able to set goals that CUPSS will track in a calendar format. CUPSS will provide reminders when items need to be reevaluated.

-To get all information in one easy to access place: First, enter information readily on hand. Then identify what other information is needed and work on gathering that information.

Most importantly, CUPSS is user-friendly:

- Less jargon
- Clean interface
- Baby-step process
- Fundamentals of AM
- Holistic process

What Can CUPSS Do?

Check Up Program for Small Systems

Set-up | Switch Utility | Create User | Help | Training | Exit

My Home My Inventory My O & M My Finances My Check Up My CUPSS Plan

Welcome Back Example, Beauty View Acres Subdivision - DW

What would you like to do today?

- Do Some Training
- Enter a New Task or Work Order
- Create or Update My Schematic
- Search Asset and Maintenance
- Create or Update My Inventory
- Enter My Finances
- Print My Check Up Reports
- Work on My CUPSS Plan

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EPA U.S. Environmental Protection Agency

My Calendar

April 2012

Sun	Mon	Tue	Wed	Thu	Fri	Sat
25	26	27	28	29	30	31
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	1	2	3	4	5

My Messages and Alerts

Popup Messages Are On. Click To Turn Off.

Reminder - Today's Tasks	8
Tasks Currently Past Due	12908
Assets Needing Update	0
Number of High Risk Assets	4

CUPSS will help:

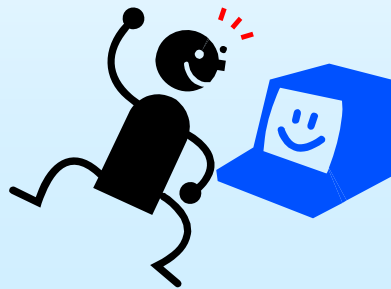
Prepare an asset management plan in 5 easy steps

Help a utility be more efficient – less time will be spent tracking tasks and finances

- Do some training
- Create or update a schematic
- Enter inventory
- Enter tasks or work orders
- Enter finances
- Generate Check Up reports
- Generate Asset Management plan

Long-Term Benefits of CUPSS

- Using CUPSS will allow utilities to:
 - Make more informed decisions
 - Save time by planning ahead
 - Back up budget talks with solid facts
 - Improve customer service



Resources Available to the CUPSS Trainer's Network

- CUPSS CD:
 - CUPSS Software
 - Getting Started with CUPSS Workbook
 - User's Guide
 - CUPSS and Us Presentation
- Trainers Can Find Additional Information on the Trainer's Section of the CUPSS Web site:
 - www.epa.gov/cupss



EPA has provided free guidance and resources to help with training and using CUPSS! Anyone can request and receive these materials!

More Support for CUPSS Trainers

- Web-based training sessions
- Discussion listserv for trainers
- Website with latest CUPSS info and Asset Management references:

<http://www.epa.gov/safewater/pws/smallsys/cupss>

- You can also contact: cupss@epa.gov



We understand the challenges and barriers to this type of change.. what really is a culture change for many systems.

We want trainers to focus on helping utilities build teams and convince decision-makers that CUPSS is the way to go.

What We Need From You



- Convey the benefits of CUPSS to smaller communities
 - All Training materials are provided!
- Train the communities how to use CUPSS
 - Deliver the message!
- Recruit other trainers and deliver train-the-trainer workshops

Trainers wear many hats, but there are a few things we need you to help us with.

Questions

Remember to submit your questions in the text box on the bottom of your screen!

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-Preparing utilities for using CUPSS

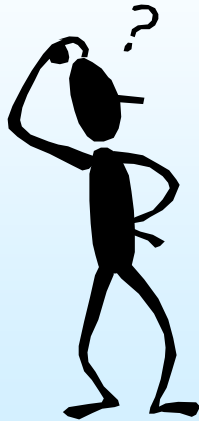
Using CUPSS With Ease: The Getting Started Workbook

- Users need to feel comfortable using CUPSS
 - Thinking about and writing down information about assets, tasks, and finances will help
- Users can start with exercises
 - Use the forms in the Getting Started with CUPSS Workbook and the printable forms in the CUPSS modules



- It's very important that participants are comfortable using CUPSS on a daily basis.
- **A key message for trainers: CUPSS is a helpful tool to get users familiar with the asset management process.**
- **A key message for trainers:** Using the forms provided in the Getting Started with CUPSS Workbook will show that CUPSS is easy to use and will help organize and plan for a utility's future.
- The Getting Started Workbook, designed to prepare users for beginning the asset management process, covers the following:
 - Getting Started with CUPSS
 - Before You Begin
 - Why Am I Here? Explains the importance of asset management and why CUPSS is a great place to start
 - What Assets Do I Have? (refer to Inventory Forms discussed later in presentation)
 - What Do I Do Every Day? Explains the importance of recordkeeping and how CUPSS can help the utility achieve a goal of excellence in recordkeeping
 - Where is the Money Going? (refer to Finance Forms discussed later in presentation)
 - What Now? Set up your Team and get started!

Preparation Exercises



- Think about what needs to be written down
 - Number, type and condition of assets
- Gather existing information that may be in files (or in heads!)
 - Financial statements
 - Daily/Weekly task logs from staff
 - Operator knowledge

The preparation exercises will allow users to become familiar with the type of data required by CUPSS before they begin CUPSS training. **As trainers, ask the utilities to identify what information they readily have and don't have on hand.** Using the printable forms in the Workbook will help. These forms are similar in content and layout to the CUPSS modules, and will be used in the training course.

The Preparation Exercises consist of these three forms:

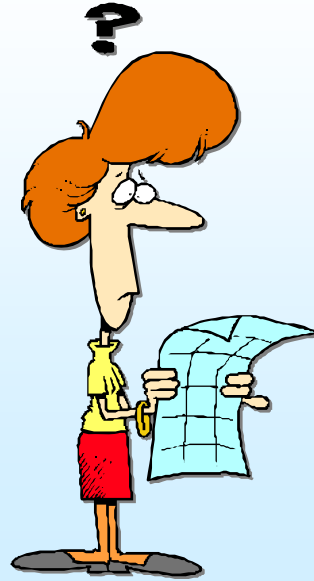
- Inventory Forms, covers both drinking water and wastewater utility assets
- New Task Form for Maintenance
- Finance Form

Note: Using the Workbook is not required to get started, but it will be very useful!

Inventory List Form

What Assets Are at the Utility?

- When was it **installed**?
- When was the last major **repair**?
- What **maintenance** will be performed this year?
- When are the major components scheduled to be **replaced**?
- Do you have or know where to get replacement **parts**?
- Will you be **financially** prepared to replace a major component if it fails?



Finding the answers to these basic questions will help the user get ready to enter assets into CUPSS.

When was it installed?

When was the last major repair?

What maintenance will be performed this year?

When are the major components scheduled to be replaced?

Do you have or know where to get replacement parts?

Will you be financially prepared to replace a major component if it fails?

Drinking Water Inventory List Form

Inventory List (Drinking Water)			
Asset Name	Location		
Associated Asset	Associated Location		
Asset ID (optional)	Asset Size (optional)		
Asset Latitude (optional)	Asset Longitude (optional)		
Storage Capacity in Days (optional)	Linear Feet (optional)		
Acres of Land (optional)			
Asset Category <input type="checkbox"/> Source <input type="checkbox"/> Pumping Facility <input type="checkbox"/> Treatment <input type="checkbox"/> Storage <input type="checkbox"/> Distribution <input type="checkbox"/> Other			
Asset Type			
<input type="checkbox"/> Wells and Springs <input type="checkbox"/> Intake Structures <input type="checkbox"/> Pumping Equipment <input type="checkbox"/> Disinfection Equipment <input type="checkbox"/> Hydro pneumatic Tanks <input type="checkbox"/> Concrete & Metal Storage Tanks <input type="checkbox"/> Transmission Mains <input type="checkbox"/> Distribution/ Collection Mains	<input type="checkbox"/> Valves <input type="checkbox"/> Computer Equipment/ Software <input type="checkbox"/> Transformers/ Switchgears/ Wiring <input type="checkbox"/> Motor Controls/Drives <input type="checkbox"/> Sensors <input type="checkbox"/> Buildings <input type="checkbox"/> Service Lines	<input type="checkbox"/> Hydrants <input type="checkbox"/> Treatment Equipment <input type="checkbox"/> Lab/Monitoring Equipment <input type="checkbox"/> Tools and Shop Equipment <input type="checkbox"/> Transportation Equipment <input type="checkbox"/> Security Equipment <input type="checkbox"/> Land	<input type="checkbox"/> Galleries and Tunnels <input type="checkbox"/> Meters <input type="checkbox"/> Raw Water Reservoirs <input type="checkbox"/> Generators <input type="checkbox"/> Liquid Waste Handling & Disposal <input type="checkbox"/> Solid Waste Handling & Disposal <input type="checkbox"/> Wells <input type="checkbox"/> Springs <input type="checkbox"/> Other
Asset Status			
<input type="checkbox"/> Active <input type="checkbox"/> Not in Use - Abandoned <input type="checkbox"/> Not in Use - Back Up <input type="checkbox"/> Future Investment Can this Asset be Repaired? <input type="checkbox"/> Yes <input type="checkbox"/> No Can this Asset be Rehabilitated? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Asset Replaced (optional): Show asset in schematic? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Condition			
<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair (Average) <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor Is the asset maintained according to manufacturer's recommendations? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Capacity			
<input type="checkbox"/> Fullsized <input type="checkbox"/> Oversized <input type="checkbox"/> Undersized			
Consequence of Failure			
<input type="checkbox"/> Insignificant - CoF of 2 <input type="checkbox"/> Minor - CoF of 4 <input type="checkbox"/> Moderate - CoF of 6 <input type="checkbox"/> Major - CoF of 8 <input type="checkbox"/> Catastrophic - CoF of 10			
Redundancy			
<input type="checkbox"/> 1% Backup <input type="checkbox"/> 50% Backup <input type="checkbox"/> 100% Backup <input type="checkbox"/> 200% Secondary Backup			
Installation Date	Original Cost		
Expected Useful Life	Replacement Cost		
Routine Maintenance Costs	Timeframe - Frequency of Routine Maintenance		
<input type="checkbox"/> perday <input type="checkbox"/> perweek <input type="checkbox"/> permonth <input type="checkbox"/> peryear <input type="checkbox"/> lifetime			
Optional Information			
Model Number	Manufacturer		
Supplier Name	Address		
City, State, Zip	Phone Number		
Fax Number	Notes		

Wastewater Inventory List Form

Inventory List (Wastewater)	
Asset Name	Location
Associated Asset	Associated Location
AssetID (optional)	Asset Size (optional)
Asset Latitude (optional)	Asset Longitude (optional)
Storage Capacity in Days (optional)	Linear Feet (optional)
Acres of Land (optional)	
Asset Category	
<input type="checkbox"/> Pumping Facility <input type="checkbox"/> Treatment <input type="checkbox"/> Storage <input type="checkbox"/> Collection <input type="checkbox"/> Other	
Asset Type	
<input type="checkbox"/> Pumping Equipment <input type="checkbox"/> Disinfection Equipment <input type="checkbox"/> Concrete & Metal Storage Tanks <input type="checkbox"/> Transmission Mains <input type="checkbox"/> Valves <input type="checkbox"/> Computer Equipment/Software	<input type="checkbox"/> Transformers/ Switch gears/ Wiring <input type="checkbox"/> Motor Controls/Drives <input type="checkbox"/> Sensors <input type="checkbox"/> Buildings <input type="checkbox"/> Service Lines <input type="checkbox"/> Treatment Equipment <input type="checkbox"/> Distribution/ Collection Mains
<input type="checkbox"/> Lab/ Monitoring Equipment <input type="checkbox"/> Tools and Shop Equipment <input type="checkbox"/> Transportation Equipment <input type="checkbox"/> Security Equipment <input type="checkbox"/> Land Sewers <input type="checkbox"/> Pressure Pipework	<input type="checkbox"/> Galleries and Tunnels <input type="checkbox"/> Meters <input type="checkbox"/> Generators <input type="checkbox"/> Liquid Waste Handling & Disposal <input type="checkbox"/> Solid Waste Handling & Disposal <input type="checkbox"/> Land Disposal <input type="checkbox"/> Digester <input type="checkbox"/> Other
Asset Status	
<input type="checkbox"/> Active <input type="checkbox"/> Not in Use - Abandoned <input type="checkbox"/> Not in Use - Back Up <input type="checkbox"/> Future Investment	
<input type="checkbox"/> Can this Asset be Repaired? <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Can this Asset be Rehabilitated? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Asset Replaced (optional): <input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> Show asset in schematic? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Condition	
<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair (Average) <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor	
<input type="checkbox"/> Is the asset maintained according to manufacturer's recommendations? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Capacity	
<input type="checkbox"/> Fullsized <input type="checkbox"/> Oversized <input type="checkbox"/> Undersized	
Consequence of Failure	
<input type="checkbox"/> Insignificant - CoF of 2 <input type="checkbox"/> Minor - CoF of 4 <input type="checkbox"/> Moderate - CoF of 6 <input type="checkbox"/> Major - CoF of 8 <input type="checkbox"/> Catastrophic - CoF of 10	
Redundancy	
<input type="checkbox"/> 0% Backup <input type="checkbox"/> 50% Backup <input type="checkbox"/> 100% Backup <input type="checkbox"/> 200% Secondary Backup	
Installation Date	Original Cost
\$	\$
Expected Useful Life	Replacement Cost
\$	\$
Routine Maintenance Costs	
Timeframe - Frequency of Routine Maintenance <input type="checkbox"/> per/day <input type="checkbox"/> per/week <input type="checkbox"/> per/month <input type="checkbox"/> per/year <input type="checkbox"/> lifetime	
Optional Information	
Model Number	Manufacturer
Supplier Name	Address
City, State, Zip	Phone Number
Fax Number	Notes

New Task Form

What Tasks are Performed?

- Think about **service history** of the assets
- Think about the **future** of the asset
- **Record-keeping** responsibilities
- Don't forget **customer service!**



Recalling the service history of important parts of a water system is as critical as planning how things will get done in the future. **As trainers, it is important to emphasize to the utility to develop habits that make record-keeping easy and understandable to the asset management team and other utility staff.**

New Task Form

New Task				
Staff Assigned		Task Name		
Task Type				
<input type="checkbox"/> Monitoring <input type="checkbox"/> Routine Maintenance <input type="checkbox"/> Repair <input type="checkbox"/> Rehabilitation <input type="checkbox"/> Replacement <input type="checkbox"/> Other				
Is this task planned?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	Is this a Capital Improvement Project?
		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
Task Details/Notes				
Cost of the Task		\$		
Percent of Task Deferred Maintenance		%		
For Asset-related Tasks				
Asset Name				
Condition				
<input type="checkbox"/> Excellent <input type="checkbox"/> Good <input type="checkbox"/> Fair (Average) <input type="checkbox"/> Poor <input type="checkbox"/> Very Poor				
Is the asset maintained according to manufacturer's recommendations?		<input type="checkbox"/> Yes	<input type="checkbox"/> No	
For Monitoring Tasks				
Chemicals	Amount	Unit	Date	Time
Schedule				
Task Start-End Date		Completed Date \ Time	Staff Completed	
Frequency			Length (days)	
<input type="checkbox"/> Daily <input type="checkbox"/> Weekly <input type="checkbox"/> Monthly <input type="checkbox"/> Annually				
Recurrs every				
_____ day(s) _____ time(s) / day		_____ week(s) on _____ (Day of week)		
Day _____ of every _____ month(s)		_____ (Week of month) _____ (Day of week) every _____ month(s)		
_____ (Month) _____ (Day of month)		_____ (Week of month) _____ (Day of week) of _____ (Month)		
Recurrence End Date				
Optional Parts Information				
Manufacturer/Supplier				
Parts Name				
Parts Number				
Parts Cost		\$		
Labor Maintenance Costs		\$		

[Screenshot of the New Task form from the Getting Started with CUPSS Workbook]

Finances Form Where Is the Money Going?



Financial decisions are one of the most important and most difficult aspects of working for a utility. Does the utility know what it will need to spend in the next 5 years?

Revenue in: rates, fees, transfer payments, grants, interest payments

Revenue out: expenses, debt service

Note to Trainers: For those utilities that have used the EPA Rate-Setting and Strategic Planning STEP Guides, the worksheets contain a great source of information that has been recorded and can be used for CUPSS preparation.

Finances Form

Finances			
Year	Cash on Hand		Interest Rate
	\$		
Revenue			
Revenue from user rates			\$
Revenue from grants			\$
Revenue from loans/bonds			\$
Transfer from reserve fund			\$
Interest			\$
Other Revenues (Total)			\$
<input type="checkbox"/> One-time fees	\$	<input type="checkbox"/> Contract sales	\$
<input type="checkbox"/> Bulk sales	\$	<input type="checkbox"/> Product sales	\$
<input type="checkbox"/> Other	\$		
Other			\$
Total Revenue			\$
Expenses			
Operating Expenses (Total)			\$
<input type="checkbox"/> Maintenance	\$	<input type="checkbox"/> Equipment	\$
<input type="checkbox"/> Salaries, Wages, Benefits	\$	<input type="checkbox"/> Supplies	\$
<input type="checkbox"/> Chemicals	\$	<input type="checkbox"/> Contracts	\$
<input type="checkbox"/> Utilities	\$	<input type="checkbox"/> Monitoring & Testing	\$
<input type="checkbox"/> Emergency	\$	<input type="checkbox"/> Lease and Mortgage	\$
<input type="checkbox"/> Insurance	\$	<input type="checkbox"/> Services	\$
<input type="checkbox"/> Training Costs	\$	<input type="checkbox"/> Billing Costs	\$
<input type="checkbox"/> Fees	\$	<input type="checkbox"/> Security	\$
<input type="checkbox"/> Other	\$		
Capital Improvements			\$
<input type="checkbox"/> Other Capital Improvements			\$
Debt Payment			\$
<input type="checkbox"/> Other Debt Payments			\$
Capital Reserve Contribution			\$
<input type="checkbox"/> Other Capital Reserve Contributions			\$
Emergency Reserve Contribution			\$
<input type="checkbox"/> Other Emergency Reserve Contributions			\$
Total Expenses			\$

[Screenshot of the Finances form from the Getting Started with CUPSS Workbook]

As trainers, one of your key messages to communities is helping them understand that changing the way the utility does business makes all the difference in being successful at asset management plan implementation. As part of the CUPSS roll-out, EPA will be releasing three fact sheets on asset management you can use in your training:

Asset Management: A Best Practices Guide

Asset Management for Local Officials

Building an Asset Management Team

Questions

Agenda

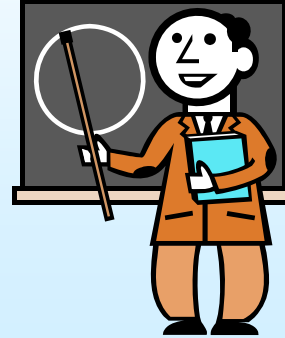
- About asset management
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-Training users on how to use CUPSS

CUPSS Training Preparation

- Before providing CUPSS training, keep a few things in mind:
 - Audience
 - Location
 - Interactive setting
 - Pre-course materials
 - Post-course evaluation



-Audience: Be sure you are talking the same language as your audience. Words like Criticality and Capital expenditures might confuse them more than help to explain something. Also, keep in mind the level of computer knowledge the trainee is familiar with.

-Location: Location, Location, Location- need I say more. Get the best site possible, which will support this type of computer based training. The usual 4-H might not be an option here.

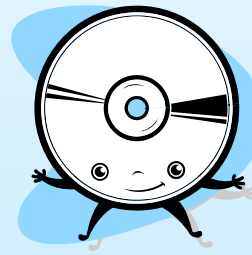
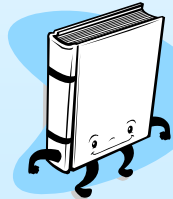
-Interactive setting: Make sure the location will have some computers for the participants to use.

-Pre-course materials: Before the training, participants should be sent the agenda and encouraged to bring hardcopies of inventory lists or financial statements if readily available. Be ready to provide examples for those that do not bring them.

- Post Course Evaluations are critical in identifying what is working and what is not. This not only helps you as a trainer but it also helps those of us out there preparing for upcoming trainings. If we know how it went for you, it can make the next trainers life that much easier. It's all about the trainer networking.

Start Training

- Become familiar with the Trainer's Kit
- No copies needed - User's Guide (in both Kits) serves as training handout
- Bring copies of the User's Kit for every participant
 - Bring extras for the users to share with co-workers



-The Trainer's Kit will include all the presentations you'll need for training efforts on top of a full user's guide!

-Presentation handouts are key – these are what the participants will refer back to when they get home. Make sure to leave room for them to use for note-taking.

-Every participant will utilize the User's Kit at the training session. There must be enough kits for each utility, if not each user.

Module-by-Module Training

My Home

My Inventory

My O&M

My Finances

My Check Up

My CUPSS Plan



- Start with general walk-thru, then proceed with each module
- User's Guide will include training exercises with data
- Emphasize baby steps
 - Dropdowns make entering information easy
 - Can reuse information already entered for different modules

The training presentation (included in your Trainer's Kit) will closely follow the User's Guide.

The User's Guide will include training exercises with sample data, ready to use.

CUPSS will guide users through a manageable data entry process. Using the system will be easier than writing that information down. Once something is added, it becomes part of different dropdowns that can be used over and over again – the user won't have to retype the same information over and over.

Set Up My CUPSS

- Staff can enter:
 - Utility Info
 - User Info
 - O&M Tasks
 - Team Members



When the user inserts their CUPSS CD, they will be taken through a one time set up process.

Enter basic [Utility information](#)

-Enter utility name and address

-Includes PWSID number and number of connections for drinking water utilities and NPDES number and flow (mgd) for wastewater utilities

Enter [User-specific information](#) -Username

-Password

Enter common [O&M tasks](#)

-Includes common tasks that utilities conduct throughout the year.

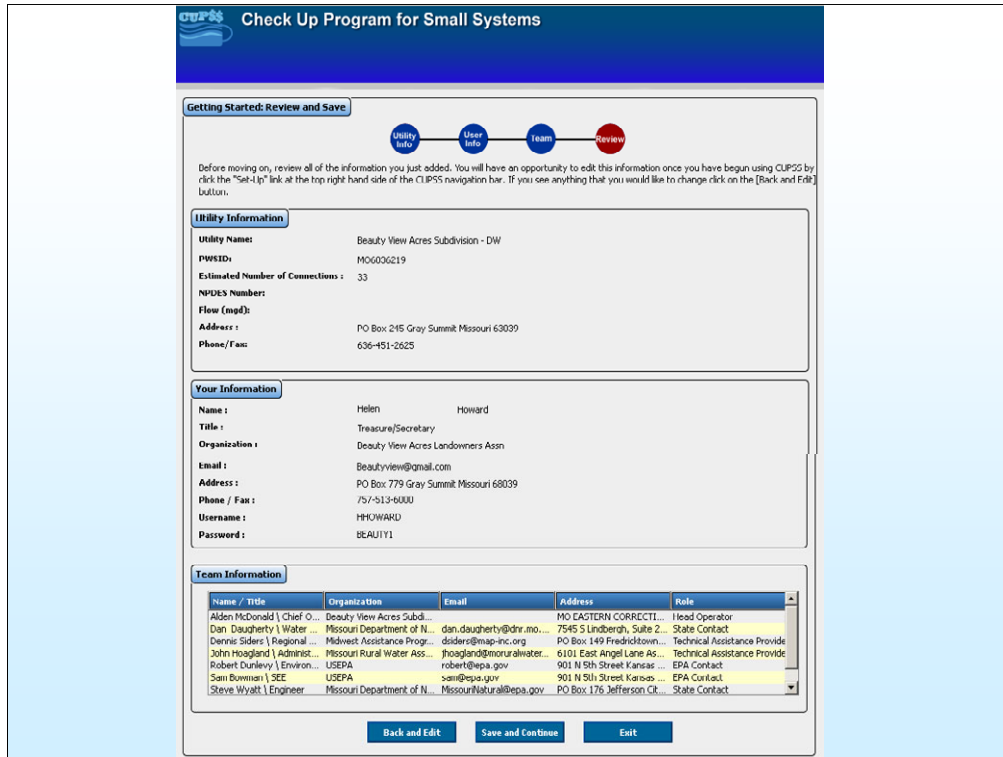
-List will be added to your operation and maintenance calendar in CUPSS and can be changed throughout the project.

Identify individuals to be on the [Asset Management Team](#)

-CUPSS contains a team assembly wizard that will allow for creation of team members, definition of roles, and contact information.

-CUPSS allows users to export the team roster and associated data into an EXCEL file.

*Good time to mention that there are no “import” or “upload” features of CUPSS.



[Screenshot of Set Up My CUPSS module]


Getting Users Started with CUPSS

Setting up the CUPSS software will take place one time – when the CD is inserted in the computer



- This is where we want to make sure basic utility information will be readily available (ex. drinking water: PWSID #; number of connections; and wastewater: NPDES number and flow (mgd))

Also, make sure basic task information will be readily available (ex. check water meter readings)

My Home



- My Training
 - Introductory training video
 - Tutorial
 - Keyword searches
 - Glossary
- Access the five modules
 - My Inventory
 - My O&M
 - My Finances
 - My Check Up Reports
 - My CUPSS Plan

This module has been developed to help a utility understand CUPSS and the asset management process through clear, concise instructional materials.

-User finds a real-life introductory training video and a tutorial for each CUPSS module.

-The help section can be keyword searched and has a glossary section in addition to example forms and reports.

Can also access the five modules

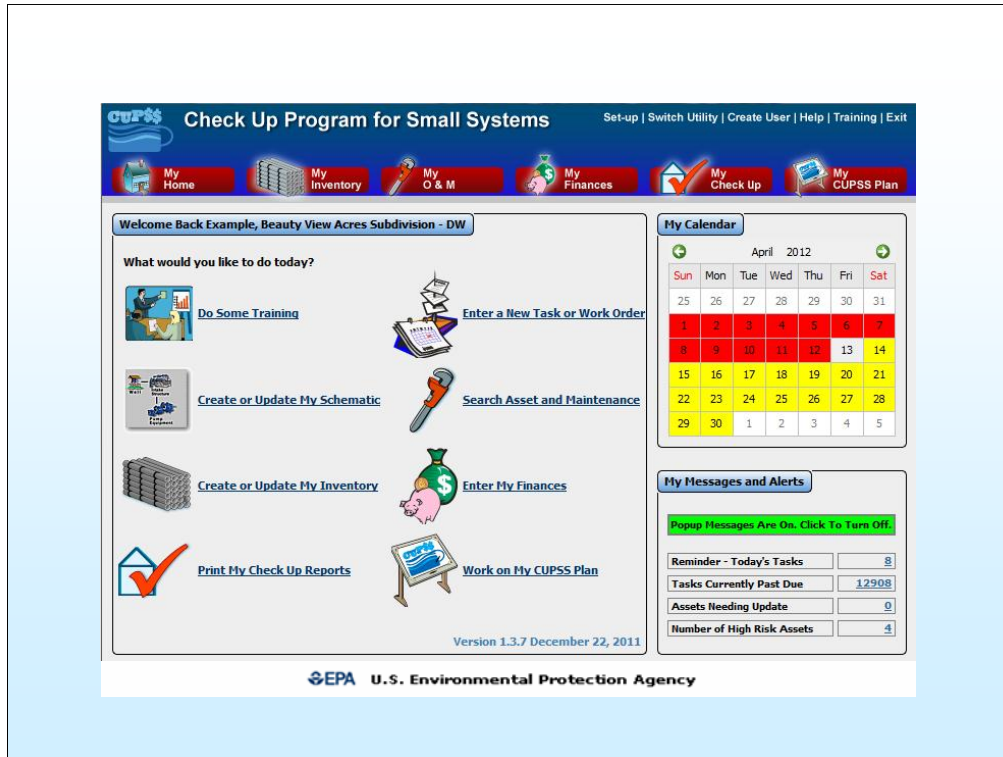
-My Inventory

-My O&M

-My Finances

-My Check Up Reports

-My CUPSS Plan



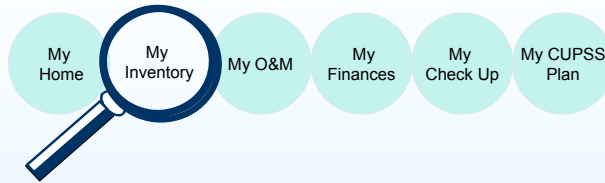
[Screenshot of My Home]

Teaching Users How to Use CUPSS

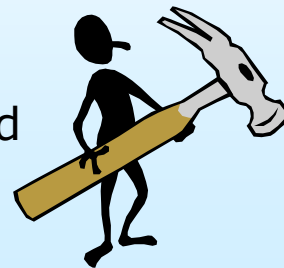
My Training section contains various 'how-to' tutorials

Users can access modules at the top of the screen or within the My Home page

My Inventory



- Identify your assets
 - Prioritize
 - Update
- Create a personalized schematic



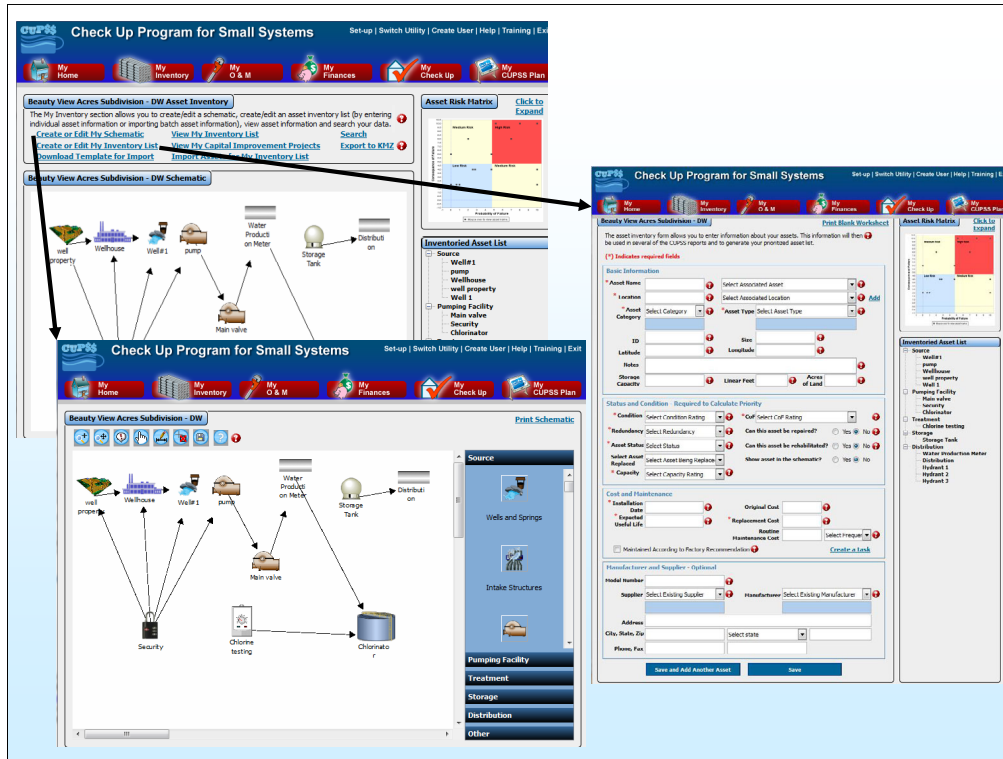
Allows users to identify and characterize their water system's assets.

-Prioritizes the user's assets based upon which ones are the most critical to the operation and helps the water system better manage their revenue for repair and replacement of assets.

-Users will enter assets and associated required and optional information.

-If an asset has already been entered, the user will have an option to reevaluate and update the asset's information.

-Users can utilize the schematic function for visual clarity – all you have to do is click and drag assets that were entered in the inventory list!



[Screenshot of My Inventory module]

Getting Users Started with Entering Assets

To enter an asset...

-Click 'Create or Edit My Inventory List'

To see a visual of where assets are located...



-Click 'Create or Edit My Schematic'

To see a list of capital improvement projects...

-Click 'View My Capital Improvement Projects'

My O&M

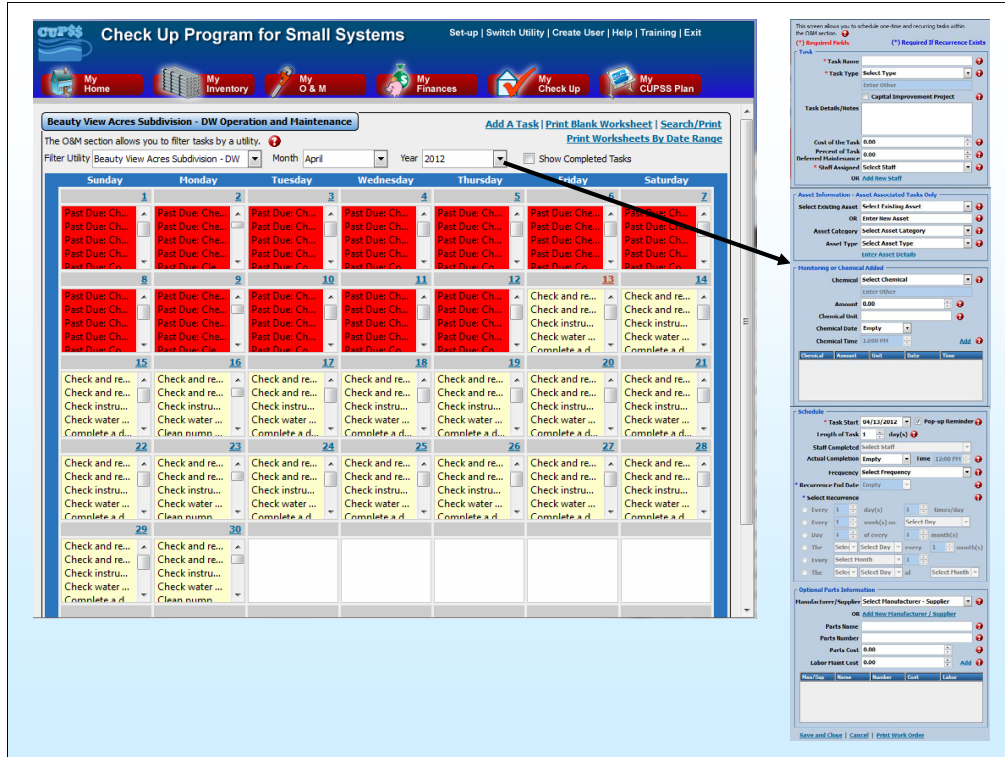
- Create future O&M activities
 - Schedule tasks
- Track current O&M activities
 - Alerts you if a task is past due

Allows users to create and track past, current, and future operation and maintenance activities as scheduled and/or logged tasks.

-The user is able to add tasks to the schedule and mark scheduled items as “completed”.

-This module records the status and history of each task and alert users if the task status is past due or critically past due. CUPSS alerts the user when to reassess the asset condition if maintenance is not performed as scheduled.



[Screenshot of My O&M module]

The training will more than likely motivating Users to Enter Tasks

My O&M page contains a calendar of tasks entered during the set up phase of CUPSS

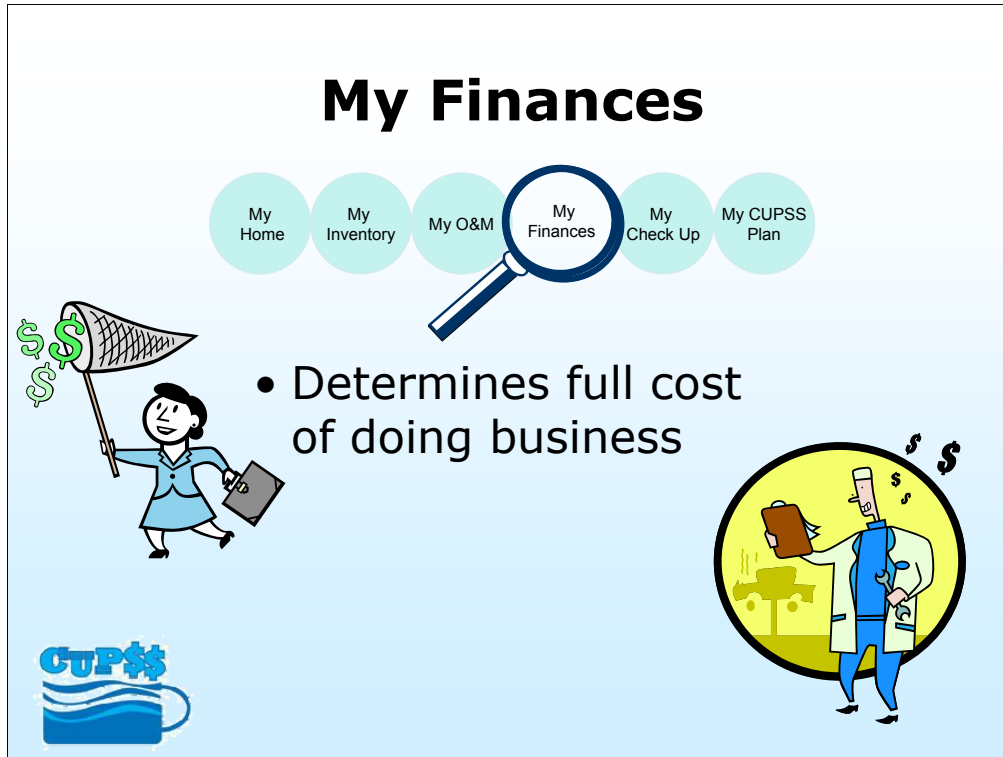
-Provides notices of past due tasks

To add additional tasks...

-Click 'Add a Task'

-If an asset associated with the task has already been entered, it will appear in a dropdown

-These additional tasks will be added to your calendar.

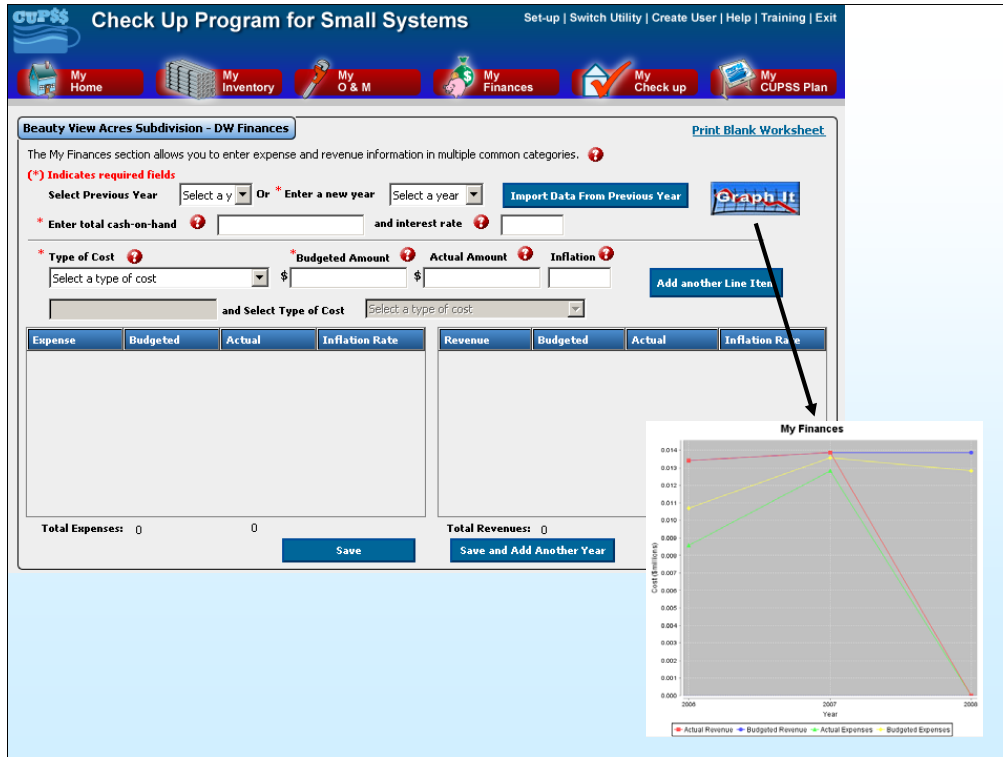


Allows users to determine the full costs of doing business and calculate how much is needed for full recovery.

-This allows the utility to discuss their needs within the context of the community budget.

-The user will be able to provide the current year's budget, what was actually spent (financial statement) from the previous year and calculate the annual costs of asset rehabilitation and replacement.

-The 'My Finances' module allows users to record personnel costs as a single value.



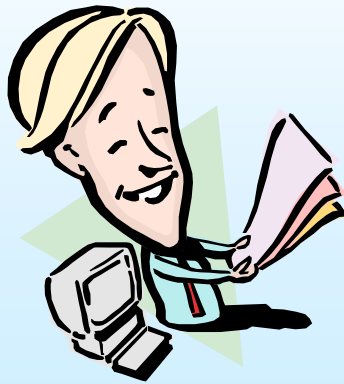
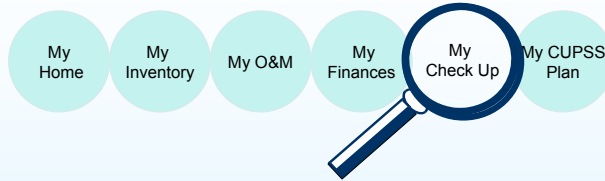
[Screenshot of My Finances module]

This function page allows the User to Tracks revenue and expenses

They begin by entering financial information for not only current year, but past years as well.

- This allows them to graph trends by clicking the 'Graph It' button. Populating this function can become difficult for those operations that do not normally deal with this type of information. It is important that they understand that you can provide a multitude of assistance to them there in the classroom so long as they make sure all their available financial statements are handy.

My Check Up Reports

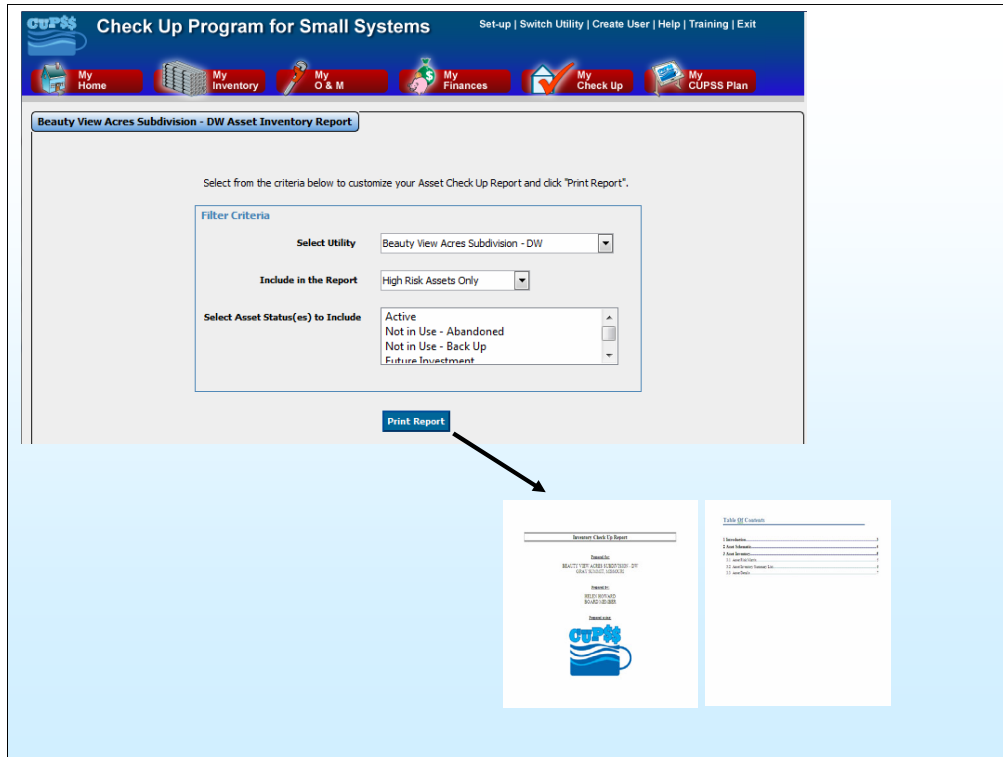


- Generates two different reports based on information entered
 - My Inventory Check Up
 - My Financial Check Up



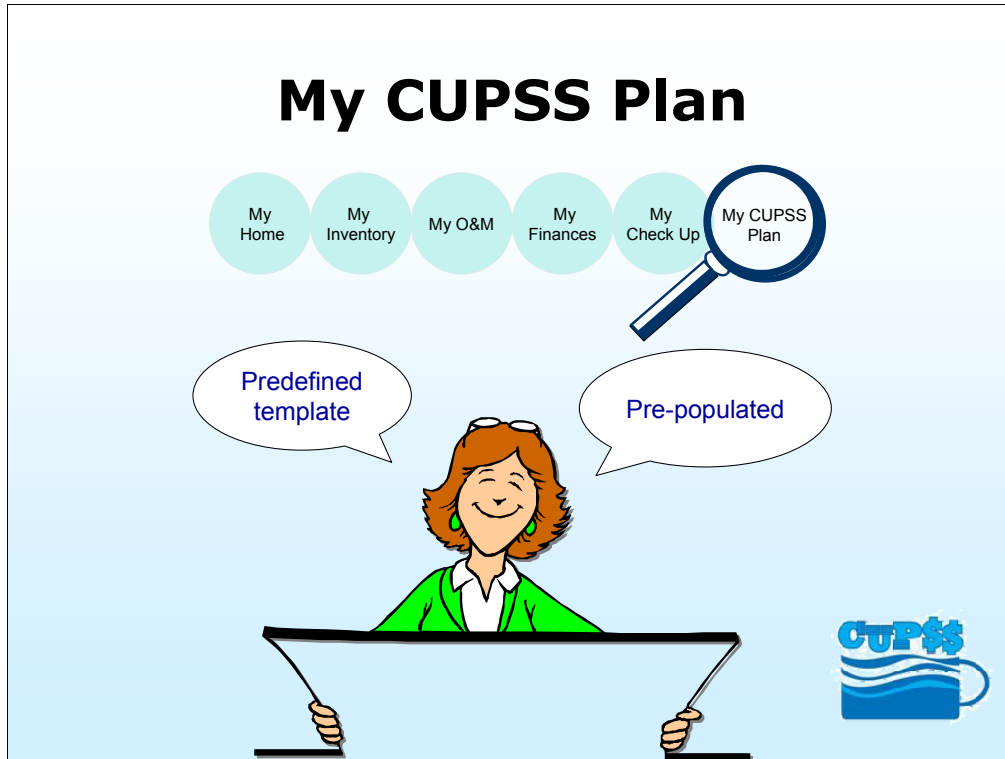
CUPSS generates two customizable reports: 'My Inventory Check Up' and 'My Financial Check Up'.

-These reports allow the user to self-select the degree of depth they wish to use to manage their assets.



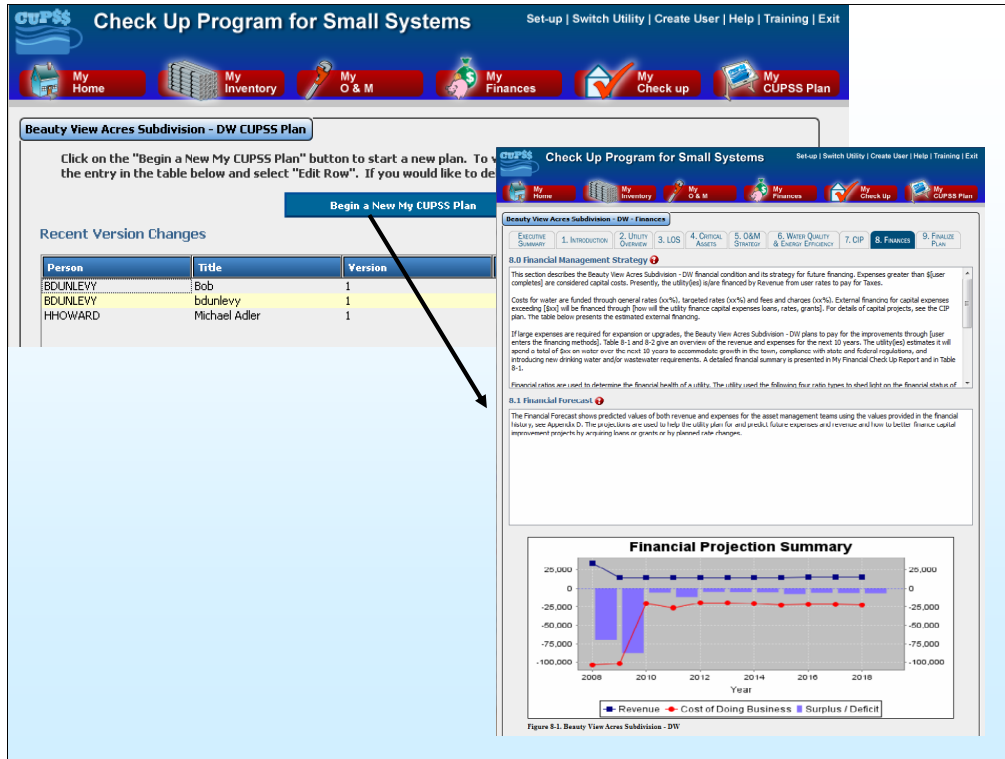
[Screenshot of My Inventory Check Up Report module]

Click 'Print Report' to generate a Word document of My Inventory Check Up report



This module assembles, based on a predefined template, an Asset Management Plan pre-populated with the information inserted by the user throughout CUPSS.

-CUPSS allows the user to export the developed plan as a Word document from the application.



[Screenshot of My CUPSS Plan module]

Customized Asset Management Plan

Use this module to begin or make edits to the utility's customized asset management plan

-User's can access previous versions of their plan!

-Click on Continue/Edit Asset Management Plan to see a pre-populated, customizable AM plan!

TRAINERS TIPS



Stress the Importance of a Team

- Responsibilities won't be burdensome if spread out among others-
- Having others on board with choices makes the process much easier



Technology is a Culture Change

- Some participants may be intimidated by the computer software
- Remind them that CUPSS was designed to be easy to use

Stress the Team Concept as much as possible. The Operator has enough to worry about just maintaining and improving their system. Delegate as much as possible. I use to have a boss that told me, letting other people "in" on what you are doing helps to spread the responsibility around. Let your Councils know what is going on- get that monkey off your back. Place them in a role of responsibility.

Technology is a huge hurdle. However, in this age of HD TV and cell phones, we are all adapting to the inevitable truth of modern technology. Big Brother has us all in his hands. Let them know that computer programs and computers are an everyday issue with even the best of users. They are not alone. Besides, I firmly believe we have designed this program as basic as one can get in performing asset management.

TRAINERS TIPS



Take Baby Steps

- Everyone may not be on board the first round
- Go through each module slowly and answer all questions



Be Proud of Yourself!

- You're helping small communities learn valuable asset management skills
- You'll be recognized as a leader in your community

There may be some opposition at first, especially with using a computer program. There may even be feelings of intimidation. Let them know that they are not being forced to do this. They can do it a little at a time. Tell them to take their time except for the pilots- they have a month.

Be sure they can contact you in case they need you in the future. It helps to know you have someone there.

Agenda

- About asset management
- How Check Up Program for Small Systems (CUPSS) can manage assets
- Preparing users for CUPSS
- Training CUPSS users
- **Evaluating training efforts**



-Evaluating CUPSS training efforts

Evaluating Training Efforts Short-term Outputs

- How many people are **requesting** the CUPSS CD?
- Who's calling **asking** about CUPSS?
- How many presentations are **made**?
How many are **in** attendance?



An evaluation component should be incorporated into all of the trainings developed to measure the effectiveness of the materials and distribution channels to continually make changes throughout the marketing effort.

We want to make sure that the CUPSS software serves the needs of our target audience. It will be very important for us (EPA) to receive feedback from our customers on the effectiveness of the tool, as well as the training and customer support.

We are asking that the CUPSS training sessions incorporate an evaluation component, so that we can measure the effectiveness of the materials, distribution channels, and training techniques. Here's some of the information we would like you keep track of and report back to us:

Who's calling asking about CUPSS?

Who is receiving the CUPSS CD?

Please keep a tally of how many CUPSS software packages have been distributed, and to whom. (We may be setting up an online registration process in the future)

How many presentations are made?

How many are in attendance?

You should also consider developing and handing out a course evaluation form for participants, and send the results to us.

Evaluating Training Efforts Long-term Outcomes

- How many utilities are **developing** Asset Management Plans?
- How many utilities **change** their management practices from using CUPSS?



As part of your training, as well as when you are providing technical assistance to various communities, it will be important to capture who is currently developing asset management plans, as well as how the utility management practices may change after applying CUPSS or other asset management tools.

We would like to begin developing a compendium of “case studies” and examples of small water and wastewater utilities who have gone through the experience of setting up asset management and those who have used CUPSS, so that we can use these examples in our training and outreach efforts.

Any evaluations of “before asset management” conditions and practices vs. “after” conditions and practices would also be very valuable, to document the benefits and impacts of asset management.

Register CUPSS Users

- User's should register their software
 - Get updates to software
 - Become part of CUPSS User listserv network
- Trainer's should encourage user's to register their software
 - Increases accountability
 - Track training efforts

You can be our partner in this evaluation effort by helping us get all users registered. This is the first time you're hearing this, but it won't be the last.

Next Steps for Trainers



- Get involved with the Trainer's Network
 - Ask questions
 - Learn from each other
 - Listserv!
- Think about your implementation plan
 - Never too early!

Hopefully you've learned a lot more about CUPSS, your role as a trainer and all the support EPA will provide for you.

But you're likely wondering what the next steps are.

Get involved with the Trainer's Network

Ask questions

Learn from each other

Listserv!

Think about your implementation plan

Never too early!

How will you and your colleagues in each part of the country help utilities get started with CUPSS?
How can you divide the labor?

We'll be working through our Regional Capacity Development Coordinators and the Regional Sustainable Infrastructure Liaisons to help you partner with each other.

Ohio EPA already has Ohio RCAP under contract to deliver CUPSS training

Robyn Doescher will deliver a 2 hour workshop on CUPSS at the IL section of AWWA meeting in March

We'll be demonstrating CUPSS at booths for AWWA ACE, EPA's Science Forum, Rural Water State conferences and more.

What will you be doing to fill up the CUPSS?

Questions?

Contact us at:

CUPSS@epa.gov

