developed are more likely to trust the process. For publicly-funded projects, public acceptance may be among the criteria. Other typical criteria include: technical feasibility; availability of funding, and sustainability (economic, social, environmental benefits).

The evaluation process includes both quantifiable data and the subjective judgment of experts and stakeholders. Document the evaluation process and scores. Highly complex projects may require more than one alternatives analysis, and the evaluation process itself may produce new alternatives.

Sample key tasks
1. Conduct stakeholder meetings to develop criteria and evaluation process
2. Develop communication materials (issue papers, plans, reports, fact sheets, etc.)
3. Distribute information via website, direct mail, email, etc.
4. CWAC presentation to accept/modify evaluation process
5. Continue data collection tasks
6. Continue advisory committee meetings

4. Develop Alternatives
Describe the technical steps to develop the alternatives, and also the interactions between the project team, consultants and stakeholder groups. The development of alternatives requires considerable technical work, including preliminary design, maps, plans, surveys, compilation of data and more. For many projects, maintaining the status quo or “no action” must be evaluated along with other alternatives.

Sample key tasks
1. RFP for design consultant
2. Select consultant team
3. Develop preliminary design concepts
4. Develop cost projections
5. Consult with regulatory agencies
6. Conduct focus group meeting with key stakeholders

5. Select Preferred Alternative
At this step, describe the process that will lead the decision-makers to choose an alternative. Include documentation of the process to develop final recommendations. For some projects, such as permit renewal, the decision-maker is a regulatory agency or other external entity.

6. Implement, Monitor, Update
After implementation, many projects should be monitored over time to ensure they continue to meet the objectives and are updated or adapted as necessary. Identify a schedule and process for monitoring, evaluation, and how to initiate modifications if needed. This step reassures stakeholders that plans are objectively evaluated and modified as appropriate. The District intends to keep planning documents current, and revisions and updates are a normal course of business.
Introducing . . . the Stakeholder Engagement Process

The Stakeholder Engagement Process (STEP) augments but does not replace other project management tools. STEP focuses on identification of issues, stakeholders, their roles, and communication processes for appropriate and effective engagement of stakeholders. All projects have a timeframe and budget, and the STEP is developed with these constraints in mind. For highly complex projects, it might be helpful to have a separate STEP for each major component of the project.

The STEP template is a simple, 1-page guide that includes major decision steps and milestones of how and when stakeholders will provide input. Before creating a STEP, the Project Manager completes a Project Concept Sheet to capture key ideas and information for planning a project. As one project manager said, “This is a tool to slow down my brain so I won’t overlook key concerns that could kill a project.” The Project Concept Sheet prompts thinking about the project drivers, constraints and opportunities, stakeholders, and decision-making processes, and is helpful when even a STEP is not required.

This guide and brief training will support staff in using STEP, and Public Affairs staff is available to help. The STEP template and Project Concept Sheet forms are posted on the Watercooler.

Major Steps
The STEP template has major project planning steps in six columns with these titles:

- Scoping (internal/external)
- Identify Issues
- Collect Data
- Develop Criteria and Evaluation Process
- Develop Alternatives
- Select Preferred Alternative
- Implement, Monitor, Update

For some projects, the Project Manager may add “major step” columns as needed to make the STEP easier to read and understand. For example, columns entitled Consultant Selection, Easement Acquisition, or Permitting might clarify the process.

Key Tasks
List the key tasks for each major step, including technical work, stakeholder engagement, and decision points. Unlike other project planning tools, the STEP focuses on decision-making processes, stakeholders and communication tasks. Be brief, but clearly describe actions and roles. Any stakeholder should be able to look at the STEP and understand their role and actions they must take.

Stakeholder Groups
List all stakeholder groups that will be engaged in the process, including internal and external stakeholders. The STEP template lists the primary decision-makers (Board, General Manager, Leadership Team, Clean Water Advisory Commission) and typical stakeholder groups. The Project Manager adds other stakeholder groups to the template, as appropriate.

The project team is the staff who provides the day-to-day technical work and may include consultants. More complex projects may have public and/or technical advisory committees that are listed here, too. Clearly define the roles of all stakeholders.

On the STEP, stakeholders may be grouped together if they will have similar roles throughout the project. For example, local jurisdictions (Cities/County), or permitting agencies (DEQ/COE/DSL), etc.

Stakeholder Involvement Level
Indicate the level of involvement for each stakeholder group during each major step, ranging from none to formal action. A stakeholder group may have more than one level of involvement during a major step, depending on the tasks. The levels of involvement include:

- None
- Receive info/updates
- Provide feedback
- Collaborate/develop recommendation
- Take formal action to accept or approve
- Staff work

The “5” indicates routine work for District staff.

Timeline
Indicate the approximate dates and duration for each major step and key tasks. If the actual date of a key task is known when the STEP is created, such as a Board or CWAC meeting, include the date. Because the STEP template is not strictly linear, the timeline for some steps and tasks may span many months or years. Dates may overlap columns due to ongoing work.

Review, approve and use the STEP
Circulate the draft STEP for review by internal stakeholders, and revise based on their comments. This process helps to ensure the STEP is complete and accurate, while building buy-in for the project. The STEP is final when all stakeholders, issues and tasks are identified.

Follow the STEP throughout the project, and remind the project team and stakeholders where they are in the process. The STEP may be updated with minor changes, as appropriate. If unanticipated major events require significant changes to the process, go back to key staff for their review and comment before amending the STEP.

More on the Major Project Steps
The STEP is intended to be a helpful guide that should not take an inordinate amount of time to develop. Projects that have an established stakeholder engagement process, such as construction of a sanitary sewer upgrade, will follow a standard STEP format that is updated for the current project. The STEP for a highly complex or controversial project may take more time to develop and refine. It might be helpful to create more than one STEP to clearly portray major components of stakeholder engagement, such as internal vs. external groups or discrete steps in a permit process or policy development.

1. Scoping and Identify Issues
All projects begin by scoping and identifying the issues. The Project Concept Sheet is a quick tool to document the internal and external scoping process. Use it to help identify the issues, stakeholders, timeline and other key considerations.

Sample key tasks
1. Identify project team and potential partners
2. Scope potential costs, risks and benefits
3. Identify stakeholders and decision-makers
4. Develop STEP, Project Concept Sheet and Communications Plan
5. Select consultant; develop contract
6. Submit Board packet for declaration of necessity

2. Collect Data
The tasks and products necessary for well-informed decisions are captured here. Name the information gathering work to be done, such as a data review, gap analysis, or specific studies. Remember that groups and meetings are sources of data, too.

Sample key tasks
1. Review relevant history and documents
2. Conduct gap analysis
3. Research issues; interview key stakeholders
4. Conduct studies, field work, etc.
5. Request Board to direct CWAC to oversee stakeholder engagement
6. Convene technical and policy advisory committees

3. Develop Criteria and Evaluation Process
Before decisions are made, the selection criteria must be developed and articulated. The criteria must encourage the exploration of multiple options. Stakeholders who agree on the criteria and evaluation process before alternatives are