



🏠 **Location:** Executive Boardroom

📅 **Date:** Tuesday, August 9, 2022

🕒 **Time:** 9:00 am

- Robin Barnes
- Tamika Duplessis
- Lynes “Poco” Sloss
- Maurice Sholas
- Janet Howard

Strategy Committee Meeting Agenda

I. Roll Call

II. Presentation Item

- a) Strategic Plan 6-Month Implementation Update and Dashboard Presentation – Darin Thomas, Raftelis

III. Discussion Item

- a) Master Planning Process Update – Tyler Antrup

IV. Public Comment

V. Adjournment

Sewerage and Water Board of New Orleans



2022-2027
STRATEGIC PLAN



Implementation Progress Report

Mid-Year 2022

Sewerage and Water Board of New Orleans

Strategic Plan Framework



Vision

To be a model utility that earns and holds the trust and confidence of our customers, community, and partners through reliable and sustainable water services.

Mission

Our team of experts serves the people of New Orleans and improves their quality of life by reliably and affordably providing safe drinking water; removing wastewater for safe return to the environment; and draining stormwater to protect our community.

Core Values

The SWBNO Team is committed to making these shared values our reality.

We are:

Customer Focused
Accountable
Safety Minded
Transparent and Honest

Focus Areas and Goals



Financial Stability

Practice strong fiscal stewardship and ensure timely revenue recovery while balancing affordability with investments necessary to deliver critical services.

Goals

Optimize Capital and Operational Spending	50/55	<div><div></div></div>
Budget Development	58/65	<div><div></div></div>
Revenue Sources	21/49	<div><div></div></div>
Affordability Programs	73/55	<div><div></div></div>

Focus Area Champion:
Grey Lewis, Chief
Financial Officer



Technology Modernization

Modernize technology and system integration to improve reliability and efficiency of operations and enhance customer service.

Goals

Software Solutions	37/63	<div><div></div></div>
System Resiliency	42/60	<div><div></div></div>
Adoption and Integration	20/62	<div><div></div></div>

Focus Area Champion:
Dave Callahan, Chief
Administrative Officer



Workforce Development and Enrichment

Support and develop a high-performing team that is skilled, committed, inspired, rewarded, engaged, and accountable.

Goals

Workforce Model Options	36/27	<div><div></div></div>
Training and Development	33/34	<div><div></div></div>
Motivate and Train Supervisors	23/24	<div><div></div></div>
Internal Communication	44/17	<div><div></div></div>
Succession Planning	36/27	<div><div></div></div>

Focus Area Champion:
Christy Harowski, Chief
of Staff



Customer Service Excellence and Stakeholder Engagement

Continuously meet and exceed the service needs of our customers and proactively communicate and engage stakeholders. 🗣️ All 🗣️ All

Goals

Culture of Customer Service	61/59	<div><div></div></div>
Improve Self-Service Options	79/71	<div><div></div></div>
Service Delivery Performance	73/55	<div><div></div></div>
Proactive Communication	70/61	<div><div></div></div>

Focus Area Champion:
Rene Gonzalez, Chief
Customer Service Officer



Infrastructure Resiliency and Reliability

Improve efficiency and resiliency of current and future infrastructure by leveraging partnerships and innovative approaches to funding and sustainable design.

Goals

Comprehensive Asset Management	66/43	<div><div></div></div>
Renew Aged Infrastructure	56/35	<div><div></div></div>
Improve Collaboration	67/51	<div><div></div></div>
System Master Plans	7/7	<div><div></div></div>

Focus Area Champion:
Ron Spooner, General
Suprintendent



Organizational and Operational Improvement

Optimize organizational structure, alignment, and capacity to ensure safe operations and efficient service delivery.

Goals

Structure and Staffing Levels	67/59	<div><div></div></div>
Enhance and Elevate Culture of Safety	78/55	<div><div></div></div>
Change Management	49/46	<div><div></div></div>
Share Metrics	46/49	<div><div></div></div>

Focus Area Champion:
Kaitlin Tymrak, Business
Services Lead

Results

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16.8 Delinquency Rate (%)	65,170,520 Aged Accounts (\$)	0.04 Assistance Program Utilization (%)
69.5 Unbilled Water	363 Days Cash on Hand	65,270,432 YTD Capital Spend
		246,587 CIP Change Orders

0 Billing Errors	0 E-Bills
0 Customer self-service utilization	0 Staff adoption of core technology systems

0 FTEs per Account	0 FTEs per MGD (W)	0 FTEs per MGD (WW)
11 Voluntary Turnover (# of Staff)	404 Open Positions (# of Positions)	0 Training Hours

2,136 Customer Disputes	75 Meter Reads (% Actual vs. Estimated)	50 Avg. Dispute Resolution (days)
7 Avg. Speed of Answer (min)	16,781 Social Media Followers	3 Engagement & Outreach Events

2.53 Sewer Manholes Inspected (%)	0 Pipe Renewal & Replacement (%)	14.63 Sewer Lines Cleaned (%)
0 Sanitary Sewer Overflows	28.7 Water Hydrants + Valves Maintained (%)	

2 Lost Time to Injury	5 Employee Sustained Injuries (ESIs)	2 Completed Process Improvement Projects
56 O&M Cost per Water Account (\$)	176 O&M Cost per WW Account (\$)	



Financial Stability Dashboard



What Does Success Look Like for the Focus Area?

Practice strong fiscal stewardship and ensure timely revenue recovery while balancing affordability with investments necessary to deliver critical services.

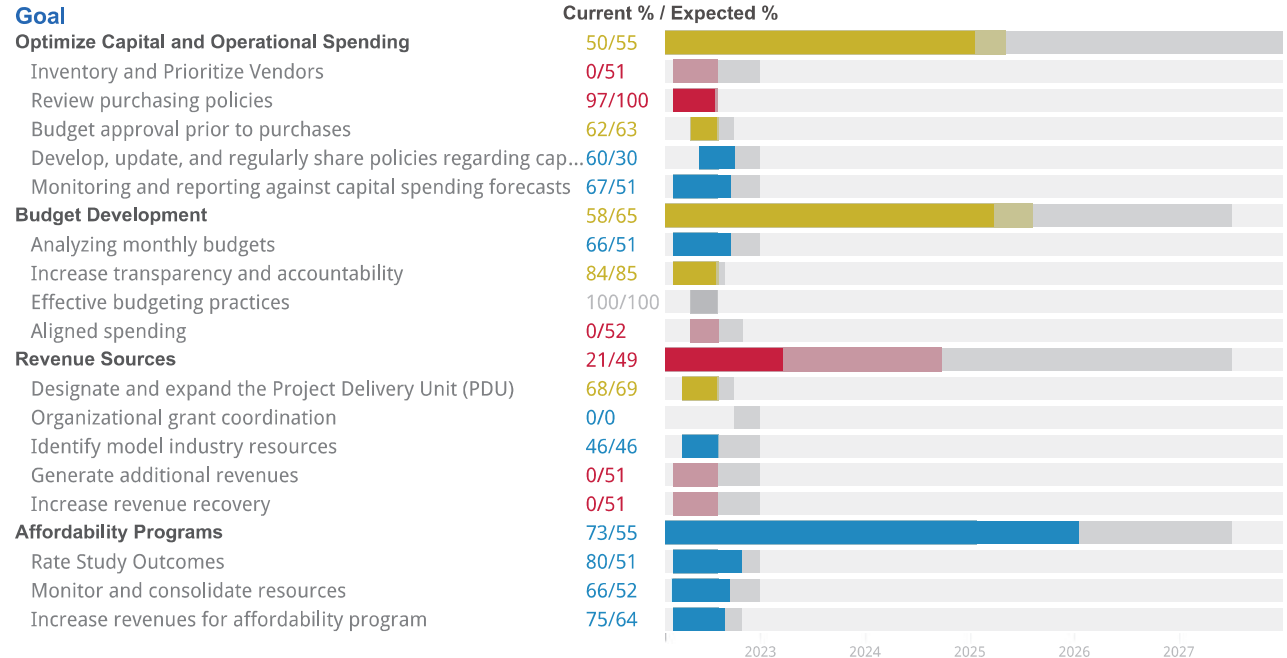
Overall Focus Area Progress: 51%

What Goals and Tactics Impact the Focus Area?

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[View 2022 Workplan](#)

[View Metric Details](#)



How is Performance of the Focus Area Measured?

Delinquency Rate (%)	Aged Accounts (\$)	Assistance Programming	Unbilled Water	Days Cash on Hand	YTD Capital Spend	CIP Change Orders
16.8%	\$65,170,520	0.04%	69.50%	363	\$65,270,432	\$246,587
Target: 0.0%	Target: \$0	Target: 0%	Target: 0.00%	Target: 180	Target: \$223,199,472	Target: \$0.00

Financial Stability

Goal and Tactic Details

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Goal 1: Optimize Capital and Operational Spending

Optimize capital and operational spending.

Goal Progress:
50%

Goal Lead:
Cashanna Moses

Tactics:

Inventory and Prioritize Vendors

Tactic Owner: TBD | **Progress:** 0% |

End Date: 12/31/22

Inventory and analyze significant spending across commodities and prioritize relationships with vendors that have the most advantageous terms for SWBNO.

Progress Notes:

6.16: Loss of staff has impacted the ability to advance this tactic.

Review purchasing policies

Tactic Owner: Cash Moses | **Progress:** 97% |

End Date: 07/31/22

Review and develop updated controls and policies to increase accountability for purchases made against corporate accounts.

Progress Notes:

Progress updated from 70% to 97% : 6.16: Policies updated; work complete, awaiting leadership approval.

Budget approval prior to purchases

Tactic Owner: Dexter Joseph | **Progress:** 62% |

End Date: 09/30/22

Develop an updated requisition process for requiring budget approval prior to purchases, and incorporate workflows in new financial system.

Progress Notes:

Progress updated from 30% to 62% : 6.16: Currently using manual processes to catch out-of-budget purchasing and are working on policies to enhance compliance.

Monitoring and reporting against capital spending forecasts

Tactic Owner: Kevin Garrison | **Progress:** 67% |

End Date: 12/31/22

Check-in quarterly and forecast capital funding sources and usage to increase spending transparency.

Progress Notes:

Progress updated from 35% to 67% : 6.16: Revised capital authority spending form, currently being circulated for input. Having weekly capital budget request meetings to verify available funding.

Financial Stability

Goal and Tactic Details

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Goal 2: Budget Development

Enhance budget development and management processes.

Goal Progress:
58%

Goal Lead:
Kevin Garrison

Tactics:

Analyzing monthly budgets

Tactic Owner: Kevin Garrison | **Progress:** 66% |
End Date: 12/31/22

Analyze monthly budget reports and perform bi-annual reviews to identify variances and be more proactive (e.g., by holding regular budget feedback meetings with departments).

Progress Notes:

Progress updated from 35% to 66% : 6.16: On-track for monthly report analysis and will begin performing bi-annual budget reviews to enhance awareness, knowledge, and transparency.

Increase transparency and accountability

Tactic Owner: Kevin Garrison | **Progress:** 84% |
End Date: 09/01/22

Designate and consistently work with the organization to increase transparency and accountability with departments in support of financial planning.

Progress Notes:

Progress updated from 58% to 84% : 6.16: Established master list of budget accountabilities across all divisions. Will be implementing remedial meetings to enhance budget accountability.

Effective budgeting practices

Tactic Owner: Dexter Joseph | **Progress:** 100% |
End Date: 07/31/22

Identify peer organizations that have effective budgeting practices and develop recommendations for improvements.

Progress Notes:

Progress updated from 0% to 100% : 6.16: Developed contacts with peer cities and the GFOA. Currently analyzing findings from meetings with those contacts.

Aligned spending

Tactic Owner: Grey Lewis | **Progress:** 0% |
End Date: 10/31/22

Increase financial controls to ensure that spending aligns with projections.

Progress Notes:

6.16: No progress to report.



Financial Stability

Goal and Tactic Details



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Goal 3: Revenue Sources

Improve timely revenue realization/recovery and leverage new and alternate revenue sources.

Goal Progress:
21%

Goal Lead:
Monique Rainey,
LaTressia Matthews

Tactics:

Designate and expand the Project Delivery Unit (PDU)

Tactic Owner: Monique Rainey | **Progress:** 68% |
End Date: 09/30/22

Designate and expand the role and staffing of the PDU to look more broadly for grants (e.g., from the Water Infrastructure Finance and Innovation Act [WIFIA]) and opportunities (e.g., Infrastructure Act funding).

Progress Notes:

Progress updated from 42% to 68% : 6.16: Currently interviewing candidates for new analyst position to investigate new revenue sources.

Identify model industry resources

Tactic Owner: Tamika Hyde | **Progress:** 46% |
End Date: 12/31/22

Use industry resources (American Water Works Association [AWWA], etc.) to identify and implement successful revenue recovery and alternate revenue source strategies from other utilities.

Progress Notes:

Progress updated from 0% to 46%

Organizational grant coordination

Tactic Owner: Monique Rainey | **Progress:** 0% |
End Date: 12/31/22

Create a process for organizational grant coordination prior to applying for funding.

Progress Notes:

6.16: This tactic will begin in October 2022.

Generate additional revenues

Tactic Owner: Tyler Antrup | **Progress:** 0% |
End Date: 12/31/22

Develop a case study which evaluates opportunities to generate additional revenues (sell services to other regional entities, better utilize the Mississippi River, etc.).

Progress Notes:

6.16: No progress to report.

Increase revenue recovery

Tactic Owner: Stephanie Thomas | **Progress:** 0% |

End Date: 12/31/22

Evaluate and update rules and regulations to increase revenue recovery (e.g., delinquency recovery, theft reduction, and institutions that have historically received free water)

Progress Notes:

6.16: No progress to report.



Financial Stability

Goal and Tactic Details



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Goal 4: Affordability Programs

Enhance affordability programs to better meet community needs.

Goal Progress:
73%

Goal Lead:
Tyler Antrup

Tactics:

Rate Study Outcomes

Tactic Owner: Tyler Antrup | **Progress:** 80% |

End Date: 12/31/22

Include affordability outcomes in the rate study and the next rate case.

Progress Notes:

Progress updated from 70% to 80% : 8/4: Meeting with Rate Study Consultant to integrate affordability program expansion into rate program.

Monitor and consolidate resources

Tactic Owner: Christy Harowski | **Progress:** 66% |

End Date: 12/31/22

Monitor and consolidate resources on external affordability programs (e.g., federal/state programs, renter programs, community action group funding).

Progress Notes:

Progress updated from 36% to 66%

Increase revenues for affordability program

Tactic Owner: Tiffany Julien | **Progress:** 75% |

End Date: 10/31/22

Evaluate and investigate opportunities to increase revenues for affordability program (e.g., bill round-up).

Progress Notes:

Progress updated from 0% to 75% : 6.16: Redoubled communication efforts pertaining to "Add a Dollar" program.



Technology Modernization Dashboard



What Does Success Look Like for the Focus Area?

Modernize technology and system integration to improve reliability and efficiency of operations and enhance customer service.

Overall Focus Area Progress: 33%

What Goals and Tactics Impact the Focus Area?

Goal

Software Solutions

- Inventory current software/systems
- Technology updates
- New Software Systems Needs Assessment
- Document Management

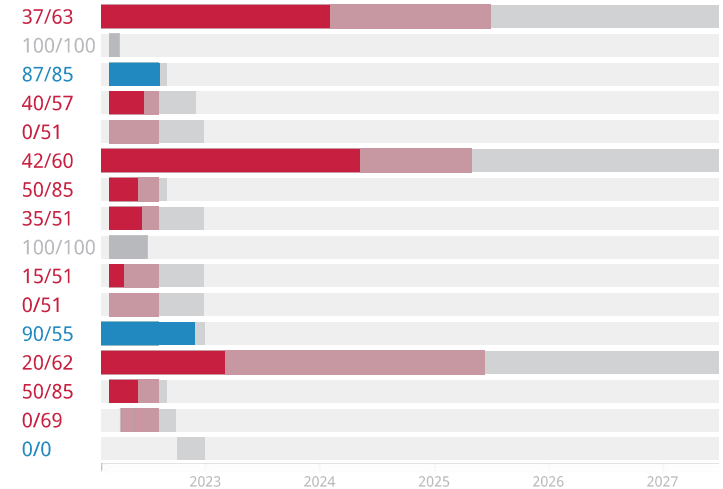
System Resiliency

- Cybersecurity policies
- AWIA assessment recommendations
- Cybersecurity for new employees
- Video technology
- Radio networks
- Firewall installation

Adoption and Integration

- Board technology
- Technology-related skills assessment
- Training needs assessment

Current % / Expected %



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[View Metric Details](#)

How is Performance of the Focus Area Measured?

Billing Errors

0.0%

Target: 1.5%

E-Bills

0.0%

Target: 0.0%

Customer self-service utilization

0.0%

Target: 0.0%

Staff adoption of core technology systems

0.0%

Target: 0.0%

Technology Modernization

Goal and Tactic Details

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Goal 1: Software Solutions

Identify and update critical/core technology software solutions and resources.

Goal Progress:
37%

Goal Lead:
Melinda Nelson

Tactics:

Inventory current software/systems

Tactic Owner: Melinda Nelson | **Progress:** 100% |

End Date: 04/01/22

Inventory current software/systems and post list of major and minor software on intranet.

Progress Notes:

Progress updated from 90% to 100% : 6.16: Inventory is complete.

Technology updates

Tactic Owner: Melinda Nelson | **Progress:** 87% |

End Date: 08/31/22

Document, prioritize, and maintain the list of technology updates that are underway or being considered.

Progress Notes:

Progress updated from 80% to 87% : 6.16: IT Department List Complete; Almost complete list of other departments.

New Software Systems Needs Assessment

Tactic Owner: Melinda Nelson | **Progress:** 40% |

End Date: 12/01/22

Complete a needs assessment and requirements for the Asset Management and new Financial software systems.

Progress Notes:

Progress updated from 40% to 40% : 6.16: Financial Needs Assessment Complete; Asset Management System Needs Assessment Not Started (also listed in Infrastructure Area).

Document Management

Tactic Owner: Yolanda Grinstead (Chanelle Collins?) |

Progress: 0% | **End Date:** 12/31/22

Produce a formal recommendation that addresses SWBNO's current document management needs.

Progress Notes:

6.16: No progress to report, needs involvement from Legal.

Technology Modernization

Goal and Tactic Details

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Goal 2: System Resiliency

Enhance cybersecurity and technology systems resiliency.

Goal Progress:
42%

Goal Lead:
Guy Lombard

Tactics:

Cybersecurity policies

Tactic Owner: Guy Lombard | **Progress:** 50% |
End Date: 08/31/22

Document cybersecurity policies, communicate relevant policies, and select and deploy training resources.

Progress Notes:

Progress updated from 0% to 50% : 6.16: Most transition policies almost complete; Cyber Security PM to review and determine additional policies needed.

AWIA assessment recommendations

Tactic Owner: Guy Lombard | **Progress:** 35% |
End Date: 12/31/22

Select, purchase, and deploy two cybersecurity software systems in support of the AWIA assessment.

Progress Notes:

Progress updated from 0% to 35% : 6.16: Enhanced cybersecurity systems have been identified and are currently being implemented. These include: MFA, Knowbe4, SEIM (spell out acronyms).

Cybersecurity for new employees

Tactic Owner: Melinda Nelson | **Progress:** 100% |
End Date: 06/30/22

Expand the orientation module on cybersecurity for new employees (and include user agreement)

Progress Notes:

Progress updated from 0% to 100% : 6.16: Complete; since May, all orientations have included cyber security and other IT information for new employees.

Video technology

Tactic Owner: Jason Higginbotham | **Progress:** 15% |
End Date: 12/31/22

Increase the use of video technology for operational/safety/security use.

Progress Notes:

Progress updated from 0% to 15% : 6.16: Security has installed access readers to HR, Payroll and Internal Audit.

Radio networks

Tactic Owner: Rebecca Johnsey | **Progress:** 0% |
End Date: 12/31/22

Develop a plan to expand the radio networks so that SCADA, security, and IT have separate dedicated radio frequencies.

Progress Notes:

6.16: There is no formal implementation plan, but Engineering is currently considering utilizing radio enabled instrumentation to be deployed.

Firewall installation

Tactic Owner: Curtis Clark | **Progress:** 90% |
End Date: 12/31/22

Complete firewall installation.

Progress Notes:

6.16: No additional progress since last update. Two firewall installations remain to be installed. Estimated time to completion: 4-6 weeks.



Technology Modernization

Goal and Tactic Details



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Goal 3: Adoption and Integration

Improve adoption and integration of current and new technology systems.

Goal Progress:
20%

Goal Lead:
Melinda Nelson

Tactics:

Board technology

Tactic Owner: Melinda Nelson | **Progress:** 50% |

End Date: 08/31/22

Provide a program for those who haven't received the training during orientation to review organizational technology, use of technology, and available resources.

Progress Notes:

Progress updated from 0% to 50% : 6.16: Most class content will come from orientation material, but may be expanded depending on who attends the class. We have to decide if we will target specific groups for each class.

Technology-related skills assessment

Tactic Owner: TBD (Labarron McClendon) | **Progress:** 0% |

End Date: 09/30/22

As a component of the training program, complete an assessment of the technology-related skills needed by job position or department

Progress Notes:

6.16: Major turnover in HR has prevented the availability of personnel to start on this task.

Training needs assessment

Tactic Owner: TBD (Labarron McClendon) | **Progress:** 0% |

End Date: 12/31/22

As a component of the training program, implement a skills assessment to understand areas of training needs based on the desired skills for a position.

Progress Notes:

Scheduled to begin in October 2022.



Technology Modernization

Performance Metrics



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Targeted Result: Billing accuracy

Billing Errors current value: 0.0%

No Data Available.

Targeted Result: More participants in electronic billing

E-Bills current value: 0.0%

No Data Available.

Targeted Result: Increased customer self-service utilization

Customer self-service utilization current value: 0.0%

No Data Available.

Targeted Result: Increased adoption of core technologies

Staff adoption of core technology systems current value: 0.0%

No Data Available.



Workforce Development and Enrichment Dashboard



What Does Success Look Like for the Focus Area?

Support and develop a high-performing team that is skilled, committed, inspired, rewarded, engaged, and accountable.

Overall Focus Area Progress: 34%

What Goals and Tactics Impact the Focus Area?

Goal

Workforce Model Options

- Establish stakeholder working group
- Evaluate current issues and opportunities
- Evaluate findings and formulate recommendations
- Workforce model and recommendations

Training and Development

- Initiate Market Study
- Optimize employee onboarding
- Develop employee total compensation summaries
- Employee Development Fund

Motivate and Train Supervisors

- Inventory leadership development programs
- Inventory leadership skills and competencies
- Evaluate gaps in current performance management

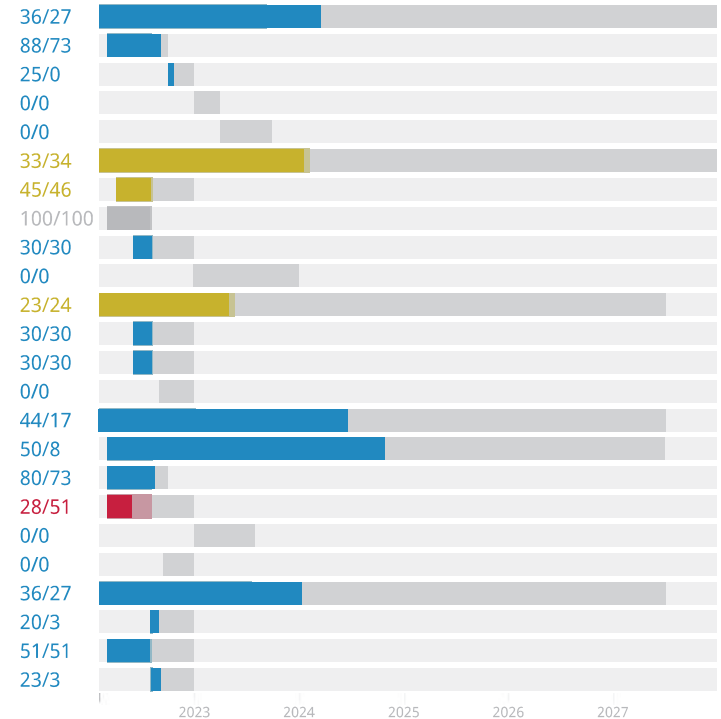
Internal Communication

- Communication channels
- Internal communication strategy
- Staff directory
- Email responses
- Inter-departmental collaboration

Succession Planning

- Deferred Retirement Option Plan (DROP) program
- Exit interview process
- Relaunch H2O Academy

Current % / Expected %



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How is Performance of the Focus Area Measured?

FTEs per Account	FTEs per MGD (W)	FTEs per MGD (WW)	Open Positions (# of Positions)	Voluntary Turnover (# of Staff)	Training Hours
0.0	0.0	0.0	404	11	0
Target: 0.0	Target: 0.0	Target: 0.0	Target: 0	Target: 0	Target: 0

Workforce Development and Enrichment

Goal and Tactic Details

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Goal 1: Workforce Model Options

Evaluate workforce model options, including Civil Service and others, and determine an appropriate approach for SWBNO.

Goal Progress:
36%

Goal Lead:
Christy Harowski

Tactics:

Establish stakeholder working group

Tactic Owner: Christy Harowski | **Progress:** 88% | **End Date:** 09/30/22

Create a stakeholder working group to facilitate and guide the process of identifying and implementing the workforce model that best supports SWBNO and its mission.

Progress Notes:

7.22: Tasks associated with this strategy are shifting. Given staff turnover, we need to ensure that the 2022 tactical activities are realistic. Will continue to assess and provide updated approach in Q3 check-in meeting.

Evaluate current issues and opportunities

Tactic Owner: WG | **Progress:** 25% | **End Date:** 12/31/22

Engage an external consultant to assist the SWB in developing a viable and effective workforce model for the SWB.

Progress Notes:

7.22: Will explore adjusting this activity in light of ongoing staffing changes. Still planning to seek external assistance for analyzing workforce model.

Evaluate findings and formulate recommendations

Tactic Owner: WG | **Progress:** 0% | **End Date:** 03/31/23

Define and document the issues and opportunities with the existing workforce model

Progress Notes:

Scheduled to begin in July 2022.

Workforce model and recommendations

Tactic Owner: Consultant/WG | **Progress:** 0% | **End Date:** 09/30/23

Develop a proposed workforce model and stakeholder working group recommendation for the Board.

Progress Notes:

Scheduled to begin in December 2022.

Workforce Development and Enrichment

Goal and Tactic Details

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Goal 2: Training and Development

Enhance resources for employee training and development.

Goal Progress:
33%

Goal Lead:
Labarron McClendon

Tactics:

Initiate Market Study

Tactic Owner: Labarron McClendon, Lenia Segura |

Progress: 45% | **End Date:** 12/31/22

Initiate Market Studies to propose updates to the Uniform Pay Plan and bring wages up to industry standards. Uniform Pay Plan changes must be approved by the Civil Service Commission.

Progress Notes:

Progress updated from 35% to 45% : 7.22: Progress is being made, but scope of tactic has shifted. Class & Comp study has been cut from the FY22 budget, so staff are planning to address individual classes on a case by case basis until a full study can be conducted.

Employee Development Fund

Tactic Owner: TBD Finance/CS | **Progress:** 0% | **End Date:** 12/31/23

Research options to create Employee Development Fund to allow flexibility in budgeting for growth opportunities like competitions, conferences, and tuition reimbursement.

Progress Notes:

7.22: Will reassess funding potential in 2023 to advance this tactic.

Optimize employee onboarding

Tactic Owner: Employee Relations / Miera Moore |

Progress: 100% | **End Date:** 07/31/22

Develop and document a more formalized program supporting improved employee onboarding, including tours, safety training, and educational opportunities.

Progress Notes:

7.22: Complete - new onboarding approach and SMS texting have been implemented.

Develop employee total compensation summaries

Tactic Owner: Miera Moore; Kimberly Batiste; Courtney Reed | **Progress:** 30% | **End Date:** 12/31/22

Create employee total compensation summaries that communicate the value of wages and benefits.

Progress Notes:

Progress updated from 7% to 30% : 7.22: On-track; continuing to compile data and ensure accuracy.



Workforce Development and Enrichment

Goal and Tactic Details



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Goal 3: Motivate and Train Supervisors

Motivate and train supervisors and leaders to improve employee and team performance.

Goal Progress:
23%

Goal Lead:
Miera Moore;
Kimberly Batiste

Tactics:

Inventory leadership development programs

Tactic Owner: Miera Moore; Kimberly Batiste | **Progress:** 30% | **End Date:** 12/31/22
Inventory existing leadership development and training requirements

Progress Notes:

Progress updated from 17% to 30% : 7.22: Signed NTP on development contract, kick-off is scheduled for the first week of August.

Inventory leadership skills and competencies

Tactic Owner: Miera Moore; Kimberly Batiste | **Progress:** 30% | **End Date:** 12/31/22
Identify required skills and competencies for supervisors and leadership positions

Progress Notes:

Progress updated from 17% to 30% : 7.22: On-track; HR consulting group will tie to leadership training and performance management activities.

Evaluate gaps in current performance management

Tactic Owner: Miera Moore; Kimberly Batiste | **Progress:** 0% | **End Date:** 12/31/22
Document current performance management issues and opportunities.

Progress Notes:

7.22: No progress to report. Will coordinate with NeoGov to look for gaps and opportunities.



Workforce Development and Enrichment

Goal and Tactic Details



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Goal 4: Internal Communication

Strengthen internal communication and information sharing to increase collaboration across departments.

Goal Progress:
44%

Goal Lead:
Corwin Washington

Tactics:

Communication channels

Tactic Owner: Grace Birch/HDR | **Progress:** 50% | **End Date:** 07/01/27

Inventory internal communication channels

Progress Notes:

Progress updated from 0% to 50%

Internal communication strategy

Tactic Owner: Grace Birch | **Progress:** 80% | **End Date:** 09/30/22
Work with HDR Engineering to develop an internal communication strategy

Progress Notes:

Progress updated from 0% to 80%

Staff directory

Tactic Owner: Employee Relations/ HR | **Progress:** 28% | **End Date:** 12/31/22

Maintain a complete staff directory for intranet and emergency call trees

Progress Notes:

Progress updated from 0% to 28%

Email responses

Tactic Owner: Corwin Washington | **Progress:** 0% | **End Date:** 07/31/23

Develop corporate norms around email responses (out of office responses, time to respond service levels, etc.)

Progress Notes:

7.22: No updates to report.

Inter-departmental collaboration

Tactic Owner: Becca Johnsey | **Progress:** 0% | **End Date:** 12/31/22

Assign personnel in each department to ensure that project updates are current in shared folder to support inter-departmental collaboration

Progress Notes:

7.22: No updates to report.



Workforce Development and Enrichment

Goal and Tactic Details



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Goal 5: Succession Planning

Improve knowledge capture, transfer, and succession planning.

Goal Progress:
36%

Goal Lead:
Irma Plummer

Tactics:

Deferred Retirement Option Plan (DROP) program

Tactic Owner: Yolanda Grinstead; Irma Plummer | **Progress:** 20%
| **End Date:** 12/31/22

Research how to tweak the Deferred Retirement Option Plan (DROP) program to support and enhance succession, including reforming eligibility requirements, knowledge capture, and reducing hiring duration

Progress Notes:

7.22: No progress to report. Will focus on defining the benefits to employees and agency expectations about what we are trying to accomplish.

Exit interview process

Tactic Owner: Kimberly Batiste | **Progress:** 51% | **End Date:** 12/31/22

Evaluate options to enhance the current exit interview process.

Progress Notes:

Progress updated from 0% to 51% : 7.22: Current process is underway. Have completed on Department as a beta test.

Relaunch H2O Academy

Tactic Owner: Dave Callahan | **Progress:** 23% | **End Date:** 12/31/22

Restart the H2O Academy.

Progress Notes:

Progress updated from 0% to 23% : 8/4: Training Contract initiated. Academy to restart soon.



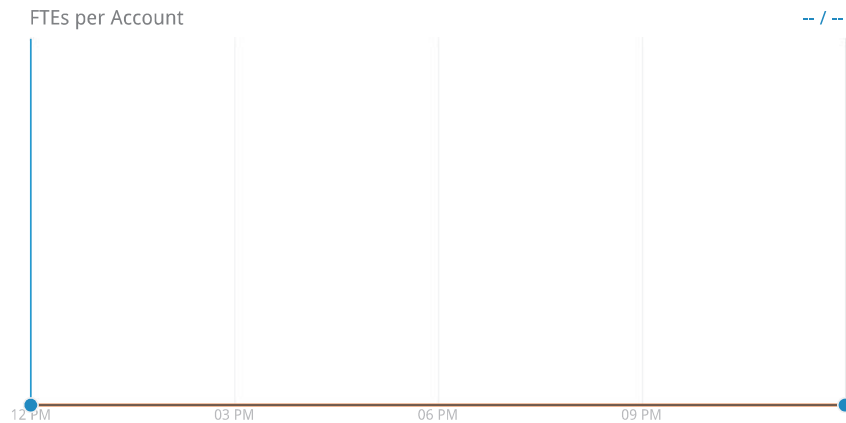
Workforce Development and Enrichment Performance Metrics



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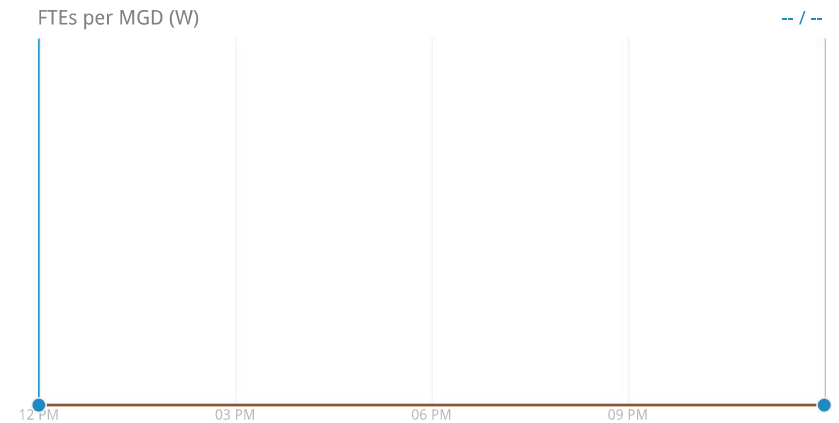
Targeted Result: Fewer FTEs per account

FTEs per Account current value: 0.0



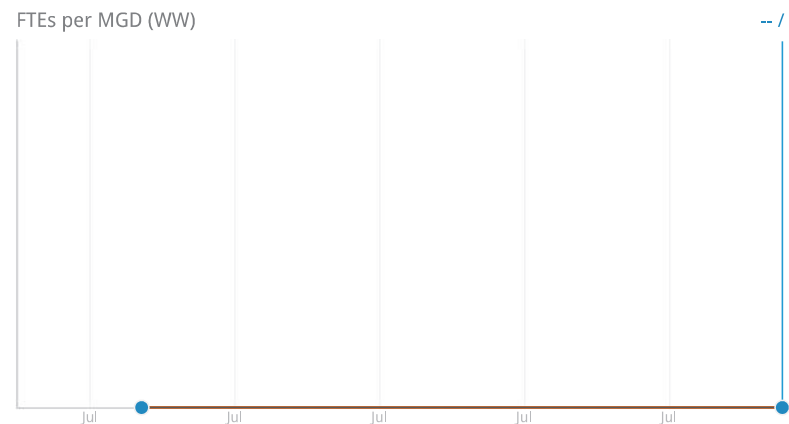
Targeted Result: Fewer FTEs per MGD of water

FTEs per MGD (W) current value: 0.0



Targeted Result: Fewer FTEs per MGD of WW

FTEs per MGD (WW) current value: 0.0





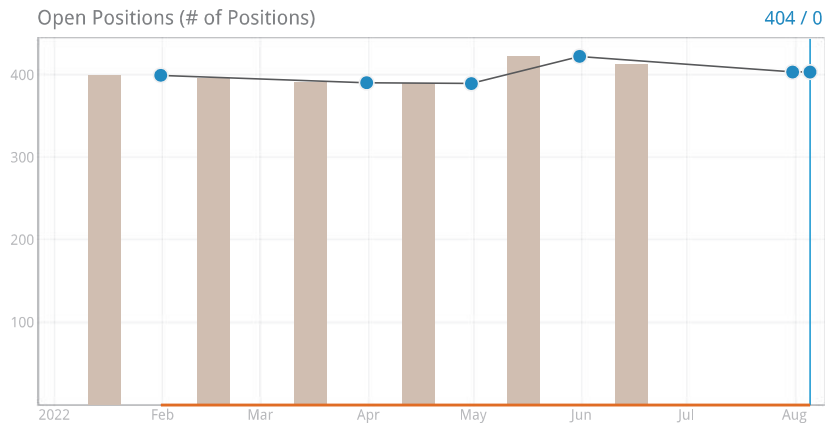
Workforce Development and Enrichment Performance Metrics



[Back to Focus Area Dashboard](#)

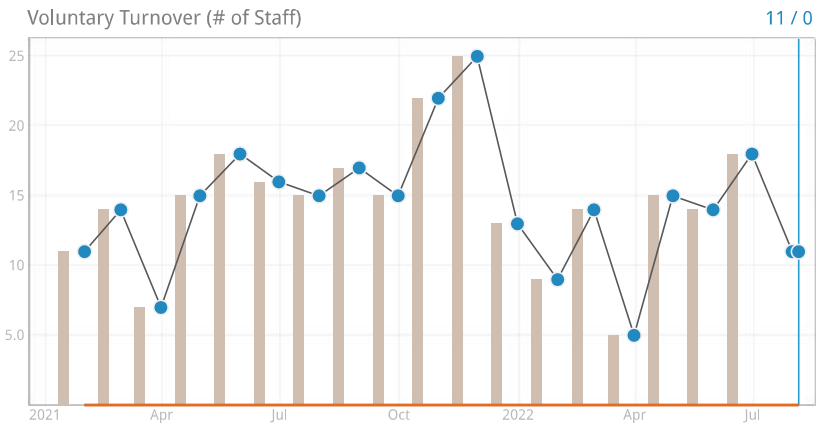
Targeted Result: Fewer open positions

Open Positions (# of Positions) for water and sewer current value: 404



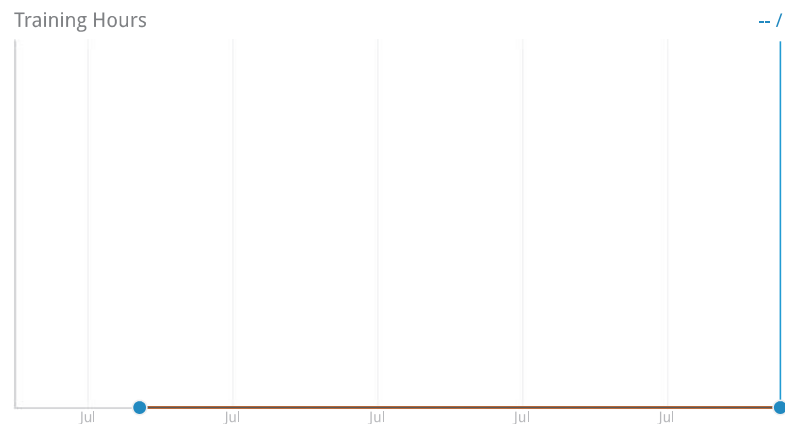
Targeted Result: Fewer resignations

Voluntary Turnover (# of Staff) current value: 11



Targeted Result: More employee training hours

Training Hours current value: 0





Customer Service Excellence and Stakeholder Engagement Dashboard



What Does Success Look Like for the Focus Area?

Continuously meet and exceed the service needs of our customers and proactively communicate and engage stakeholders.

Overall Focus Area Progress: 71%

What Goals and Tactics Impact the Focus Area?

[Back to Strategic Framework](#)

[View 2022 Workplan](#)

[View Metric Details](#)

Goal

Culture of Customer Service

- Customer service representative training
- Skills and competencies gap analysis
- Training needs assessment
- Customer service on-boarding program
- Continuous improvement program

Improve Self Service Options

- Customer payment options
- Implement Verint support
- Multi-lingual resources
- Customer payment locations

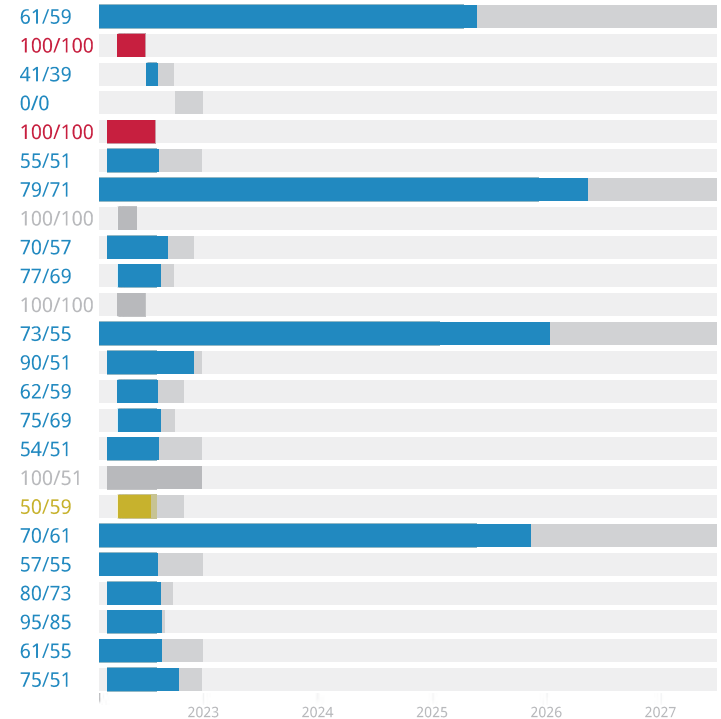
Service Delivery Performance

- Resource Meter Readers
- Customer-facing resources
- Meter reading incentives
- Customer service surveys
- Meter reading accuracy
- Customer dispute process

Proactive Communication

- Identify organizational (external) communication needs
- Perform communication needs gap analysis
- Customer-facing dashboard
- Communication outreach plan
- Continue advancing specific messaging initiatives

Current % / Expected %



How is Performance of the Focus Area Measured?

Customer Disputes	Avg. Dispute Resolution (days)	Avg. Speed of Answer (min)	Meter Reads (% Actual vs. Estimated)	Social Media Followers	Engagement & Outreach Events
2,136 Target: 0	50 Target: 0	7 Target: 0	75.0% Target: 0.0%	16,781 Target: 0	3 Target: 0



Customer Service Excellence and Stakeholder Engagement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 1: Culture of Customer Service

Foster a culture of customer service throughout the organization.

Goal Progress:
61%

Goal Lead:
Rene Gonzalez

Tactics:

Customer service representative training

Tactic Owner: Nichol Green | **Progress:** 100% | **End Date:** 06/30/22

Inventory existing training and technology used to support customer-facing representatives.

Progress Notes:

Progress updated from 84% to 100%

Skills and competencies gap analysis

Tactic Owner: Rene Gonzalez (+CS Leadership) | **Progress:** 41% | **End Date:** 09/30/22

Conduct a gap analysis between current and desired skills and competencies.

Progress Notes:

Progress updated from 0% to 41%

Training needs assessment

Tactic Owner: Rene Gonzalez (+CS Leadership) | **Progress:** 0% | **End Date:** 12/31/22

Identify and deploy high-impact training and tools that can help bridge the gap, including refresher training.

Progress Notes:

Scheduled to begin in October 2022.

Customer service on-boarding program

Tactic Owner: Matt LaFrance | **Progress:** 100% | **End Date:** 07/31/22

Collaborate with the Workforce Development & Enrichment focus team to enhance the customer service-focused aspects of the on-boarding program for all new employees.

Progress Notes:

Progress updated from 50% to 100%

Continuous improvement program

Tactic Owner: Rene Gonzalez, Gabe Bordenave | **Progress:** 55% | **End Date:** 12/31/22

Advance a continuous improvement program within Customer Service

Progress Notes:

Progress updated from 35% to 55% : 6.16: On-target; meetings have begun across the departments to identify pain points.



Customer Service Excellence and Stakeholder Engagement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 2: Improve Self-Service Options

Expand convenience systems and capabilities to improve self-service options for customers.

Goal Progress:
79%

Goal Lead:
Waldeen Mitchell

Tactics:

Customer payment options

Tactic Owner: Tiffany Julien | **Progress:** 100% | **End Date:** 06/01/22

Investigate additional customer payment options.

Progress Notes:

Progress updated from 0% to 100% : 6.16: Complete; work has begun adding additional payment options.

Implement Verint support

Tactic Owner: Gabe Bordenave | **Progress:** 70% | **End Date:** 11/30/22

Implement Verint support for Customer Relationship Management (CRM) software.

Progress Notes:

Progress updated from 48% to 70% : 6.16: Currently working on resolving IT integration issues, developing new forms for new functionality, progress being made.

Multi-lingual resources

Tactic Owner: Waldeen Mitchell | **Progress:** 77% | **End Date:** 09/30/22

Inventory and explore increased multi-lingual resources (website, printed materials, etc.).

Progress Notes:

Progress updated from 63% to 77%

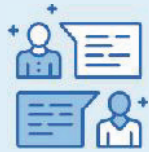
Customer payment locations

Tactic Owner: Stephanie Thomas | **Progress:** 100% | **End Date:** 06/30/22

Evaluate opportunities to expand and promote Fidelity Express and increase customer payment locations.

Progress Notes:

Progress updated from 0% to 100% : 6.16: Complete; currently focused on transitioning to new capability.



Customer Service Excellence and Stakeholder Engagement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 3: Service Delivery Performance

Elevate core customer service delivery performance.

Goal Progress:
73%

Goal Lead:
Monique Chatters

Tactics:

Resource Meter Readers

Tactic Owner: Rene Gonzalez, Monique Chatters | **Progress:** 90%
| **End Date:** 12/31/22

Identify and procure vehicles to resource Meter Readers.

Progress Notes:

Progress updated from 19% to 90% : 6.16: Successfully procured adequate vehicles at this point.

Customer-facing resources

Tactic Owner: Whitney Bentley | **Progress:** 62% | **End Date:** 10/31/22

Inventory, assess, and improve resources to help customers understand high and estimated bills.

Progress Notes:

Progress updated from 50% to 62% : 6.16: Added online bill explaining tool to website. Currently exploring other opportunities to enhance overall bill understanding.

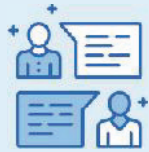
Meter reading incentives

Tactic Owner: Monique Chatters, Patricia Davenport, Andrea El-Mansura | **Progress:** 75% | **End Date:** 10/01/22

Evaluate and recommend improvements to the meter reading incentive program.

Progress Notes:

Progress updated from 41% to 75% : Progress updated from 15% to 41% : 6.16: On-target; actively working to identify opportunities to incentivize meter reading performance. Collaborating with meter reading staff to create rewards that increase workday flexibility.



Customer Service Excellence and Stakeholder Engagement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 3: Service Delivery Performance (cont.)

Elevate core customer service delivery performance.

Goal Progress:
73%

Goal Lead:
Monique Chatters

Tactics:

Customer service surveys

Tactic Owner: Rene Gonzalez | **Progress:** 54% | **End Date:** 12/31/22

Develop and deploy customer service surveys - transactional and full customer base.

Progress Notes:

Progress updated from 50% to 54% : 6.16: Having conversations with external stakeholders about feasibility, cost, etc.

Meter reading accuracy

Tactic Owner: Andrea El-Mansura | **Progress:** 100% | **End Date:** 12/31/22

Implement a quality control/audit program for meter reading accuracy.

Progress Notes:

Block was closed with a rating of 5 out of 5

Customer dispute process

Tactic Owner: Tiffany Julien, Chris Robertson | **Progress:** 50% | **End Date:** 10/31/22

Review and streamline the customer dispute process.

Progress Notes:

Progress updated from 20% to 50% : 6.16: Identifying opportunities for continuous improvement which is inclusive of customer and internal communication, as well as internal workflows.



Customer Service Excellence and Stakeholder Engagement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 4: Proactive Communication

Advance proactive communication and outreach programs.

Goal Progress:
70%

Goal Lead:
Grace Birch

Tactics:

Identify organizational (external) communication needs

Tactic Owner: Grace Birch | **Progress:** 57% | **End Date:** 12/31/22

Identify organizational communication and outreach needs and resources.

Progress Notes:

Progress updated from 40% to 57% : 6.16: Immediate, short-term needs have been identified and we are currently channeling resources to address current communication needs.

Perform communication needs gap analysis

Tactic Owner: Grace Birch | **Progress:** 80% | **End Date:** 09/30/22

Perform a gap assessment and develop a communication roadmap for customer communications.

Progress Notes:

Progress updated from 0% to 80% : 6.16: Developing gap analysis, anticipate completion in July.

Continue advancing specific messaging initiatives

Tactic Owner: Grace Birch | **Progress:** 75% | **End Date:** 12/31/22

Create specific/tailored messaging

Progress Notes:

Progress updated from 35% to 75% : 6.16: Completed water quality report and annual update, establishing a schedule for current and future communication initiatives.

Communication outreach plan

Tactic Owner: Grace Birch | **Progress:** 61% | **End Date:** 12/31/22

Develop and deliver a comprehensive communication outreach plan.

Progress Notes:

Progress updated from 40% to 61% : 6.16: Drafting communication plan, will soon be sharing that plan internally for validation with goal of completion by end of 2022.

Customer-facing dashboard

Tactic Owner: Grace Birch | **Progress:** 95% | **End Date:** 08/31/22

Develop customer-facing dashboards with data that is meaningful for them.

Progress Notes:

Progress updated from 0% to 95% : 6.16: Customer Service group's externally facing dashboards almost complete, will be published externally in Q3 of 2022.



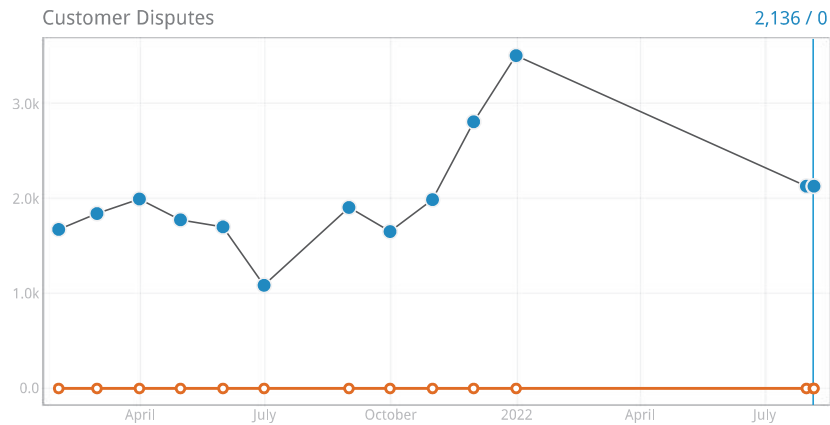
Customer Service Excellence and Stakeholder Engagement Performance Metrics



[Back to Focus Area Dashboard](#)

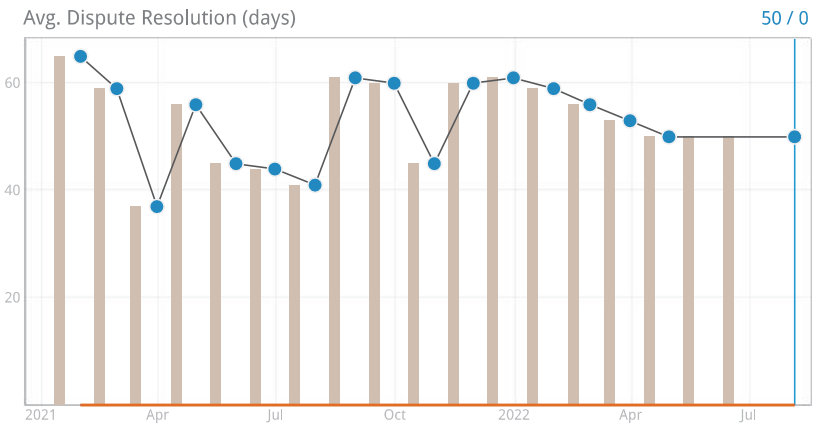
Targeted Result: Fewer customer disputes

Customer Disputes current value: 2,136



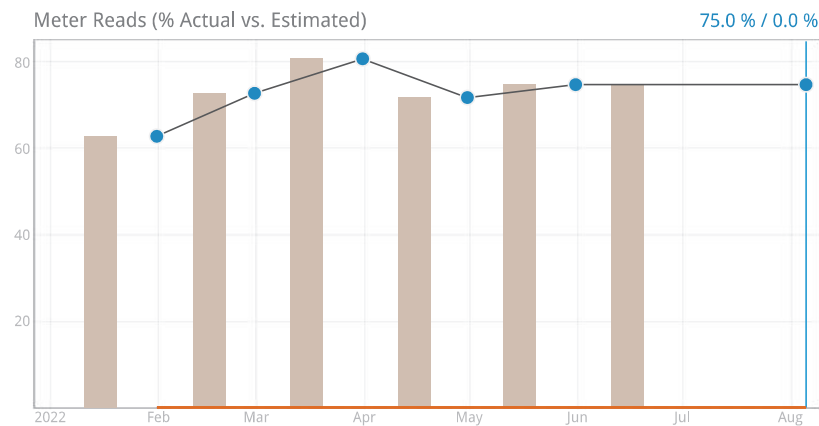
Targeted Result: Fewer days to resolve billing disputes

Avg. Dispute Resolution (days) current value: 50



Targeted Result: All estimated meter reads completed

Meter Reads (% Actual vs. Estimated) current value: 75.0%





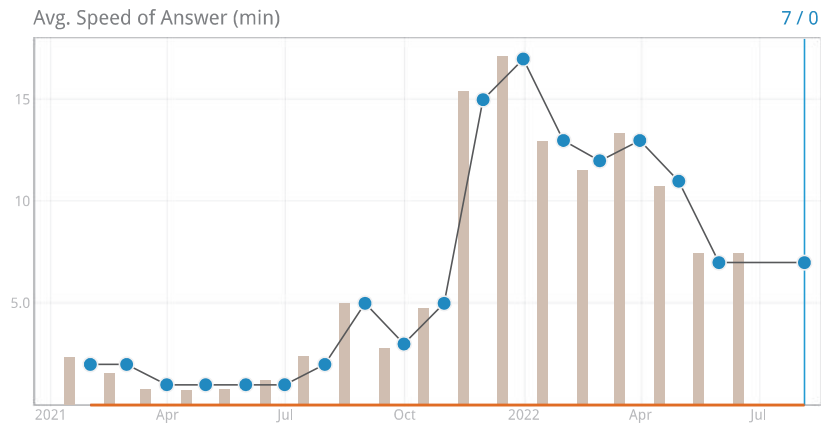
Customer Service Excellence and Stakeholder Engagement Performance Metrics



[Back to Focus Area Dashboard](#)

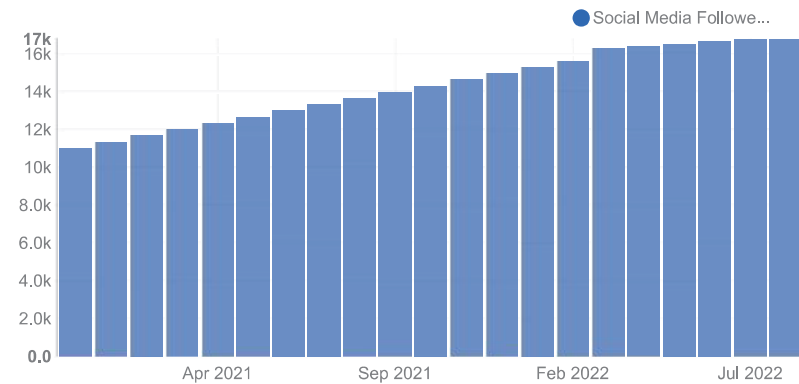
Targeted Result: Reduction in phone hold times

Avg. Speed of Answer (min) current value: 7



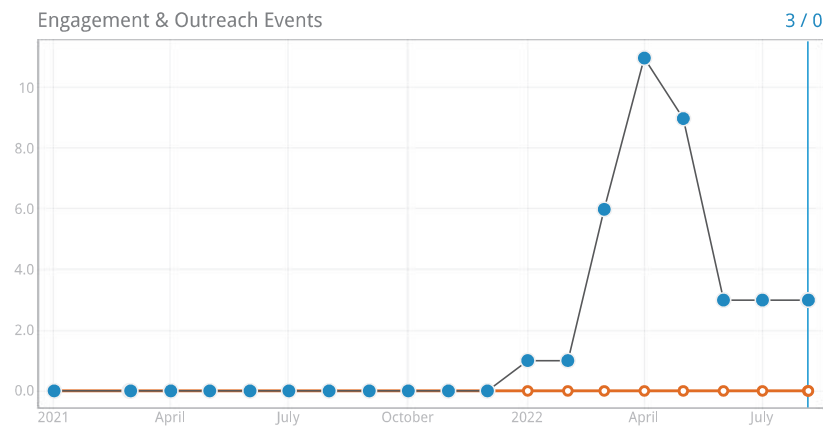
Targeted Result: Increased social media following

Social Media Followers current value: 16,781



Targeted Result: More stakeholder engagement & outreach events

Engagement & Outreach Events current value: 3





Infrastructure Resiliency and Reliability

Dashboard



What Does Success Look Like for the Focus Area?

Improve efficiency and resiliency of current and future infrastructure by leveraging partnerships and innovative approaches to funding and sustainable design.

Overall Focus Area Progress: 49%

What Goals and Tactics Impact the Focus Area?

Goal

Comprehensive Asset Management

- Preliminary Risk Assessment
- Comprehensive AM Needs Assessment
- AM Working Group

Renew Aged Infrastructure

- Catalogue resource needs
- Integrated planning efforts

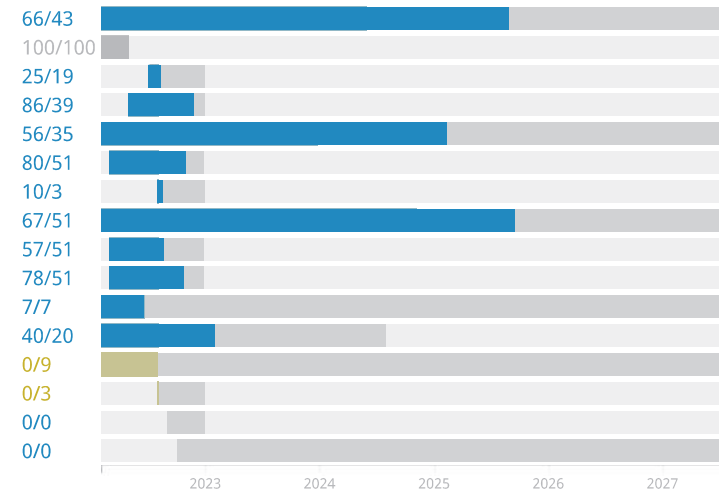
Improve Collaboration

- Communicate capital delivery
- Contract management process

System Master Plans

- Sewerage model
- Storm planning and models
- System Master Planning
- Greenhouse gas emissions
- Begin System Plans

Current % / Expected %



[Back to Strategic Framework](#)

[View 2022 Workplan](#)

[View Metric Details](#)

How is Performance of the Focus Area Measured?

Pipe Renewal & Replacement (%)

0.0%

Target: 0.0%

Sewer Manholes Inspected (%)

2.53%

Target: 1.00%

Sewer Lines Cleaned (%)

14.63

Target: 14.28

Water Hydrants + Valves Maintained (%)

28.7%

Target: 0.0%

Sanitary Sewer Overflows

0

Target: 0

Infrastructure Resiliency and Reliability

Goal and Tactic Details

[Back to Focus Area Dashboard](#)

Goal 1: Comprehensive Asset Management

Shift maintenance planning and workflows from reactive to preventative through comprehensive asset management.

Goal Progress:
66%

Goal Lead:
Fred Tharp, David

Cappel, Ashraf
Abdelbaqi

Tactics:

Comprehensive AM Needs Assessment

Tactic Owner: Kaitlin Tymrak, Robert Hicks | **Progress:**

25% | **End Date:** 12/31/22

Develop a scope of work and select a vendor to serve as owner/agent to develop a procurement instrument for the new AM software system.

Progress Notes:

Progress updated from 0% to 25% : 8/4: Working group currently developing scope for program management.

AM Working Group

Tactic Owner: Ron Spooner, Charles Sauerwin | **Progress:**

86% | **End Date:** 12/31/22

Form an internal AM working group by 2023 to meet on a monthly basis.

Progress Notes:

Progress updated from 0% to 86% : 8/4: Working group formed and meeting monthly.

Infrastructure Resiliency and Reliability

Goal and Tactic Details

[Back to Focus Area Dashboard](#)

Goal 2: Renew Aged Infrastructure

Replace and renew aged infrastructure using integrated approaches.

Goal Progress:
56%

Goal Lead:
Steven Giang

Tactics:

Catalogue resource needs

Tactic Owner: Kaitlin Tymrak | **Progress:** 80% | **End Date:** 12/31/22

Catalogue resource needs across water, wastewater, and stormwater drainage systems

Progress Notes:

Progress updated from 0% to 80% : 6.17: Analysis complete; need to generate report outlining resource needs identified.

Integrated planning efforts

Tactic Owner: Ron Spooner | **Progress:** 10% | **End Date:** 12/31/22

Ensure sufficient resources for integrated planning efforts by communicating needs and value to the Board, stakeholders, and the public.

Progress Notes:

Progress updated from 0% to 10% : 8/4: Presenting framework to Strategy Committee for review in August.



Infrastructure Resiliency and Reliability

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 3: Improve Collaboration

Successfully deliver all critical capital improvement projects by improving collaboration with project partners.

Goal Progress:
67%

Goal Lead:
Chris Bergeron

Tactics:

Communicate capital delivery

Tactic Owner: Ron Spooner | **Progress:** 57% | **End Date:** 12/31/22

Develop an enhanced way to monitor and communicate capital delivery performance.

Progress Notes:

Progress updated from 25% to 57% : 6.17: Currently produce series of reports, will work to consolidate them into a singular capital project delivery report between Engineering and Communications.

Contract management process

Tactic Owner: Mark Van Hala, Chris Bergeron, Kaitlin Tymrak, Steven Giang, Kyle Breau | **Progress:** 78% | **End Date:** 12/31/22

Conduct an assessment of contract management process to improve consistency and streamline processes.

Progress Notes:

Progress updated from 25% to 78% : 6.17: Evaluated and optimized contract routing and final acceptance. Next focus is on inventorying all contract management workflows.



Infrastructure Resiliency and Reliability

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 4: System Master Plans

Develop long-range system master plans to renew infrastructure incorporating community vision, green infrastructure, and climate adaptation.

Goal Progress:
7%

Goal Lead:
Tyler Antrup

Tactics:

System Master Planning

Tactic Owner: Tyler Antrup | **Progress:** 0% | **End Date:** 12/31/22

Work with Board of Directors and Leadership Team to develop a framework for overall integrated system master planning efforts.

Progress Notes:

Scheduled to begin in August 2022.

Begin System Plans

Tactic Owner: Tyler Antrup | **Progress:** 0% | **End Date:** 07/01/27

Develop scopes of work and release RFPs for each system master plan.

Progress Notes:

Scheduled to begin in October 2022.

Sewerage model

Tactic Owner: Steven Giang | **Progress:** 40% | **End Date:** 07/31/24

Complete the sewerage model.

Progress Notes:

Progress updated from 0% to 40% : 6/22 update: This will be an ongoing task but as of this year we are following the consent decree schedule and are at 40% completed.

Storm planning and models

Tactic Owner: Jason Higginbotham | **Progress:** 0% | **End Date:** 07/01/27

Update models and implement plans for stronger storms.

Progress Notes:

Greenhouse gas emissions

Tactic Owner: Felicia Bergeron | **Progress:** 0% | **End Date:** 12/31/22

Develop strategies to reduce greenhouse gas emissions to target levels.

Progress Notes:

Scheduled to begin in September 2022.



Infrastructure Resiliency and Reliability

Performance Metrics



[Back to Focus Area Dashboard](#)

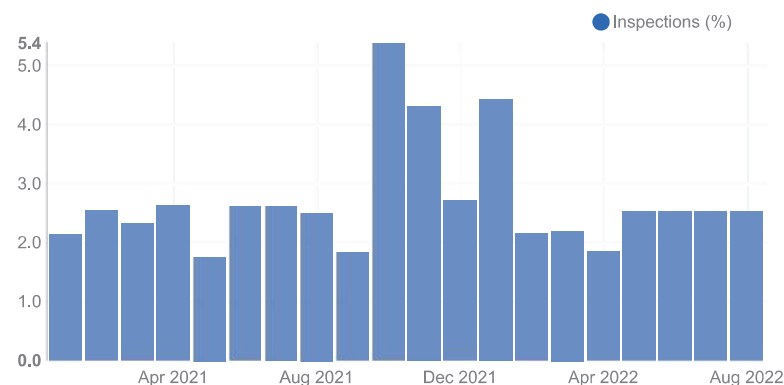
Targeted Result: Increased pipe renewal & replacement

Pipe Renewal & Replacement (%) current value: 0.0%

No Data Available.

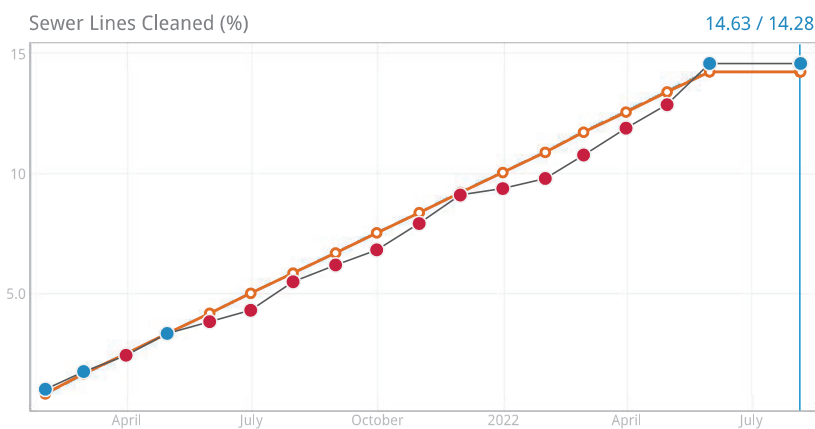
Targeted Result: More proactive manhole inspections

Sewer Manholes Inspected (%) current value: 2.53%



Targeted Result: More miles of sewer cleaned

Sewer Lines Cleaned (%) current value: 14.63





Infrastructure Resiliency and Reliability

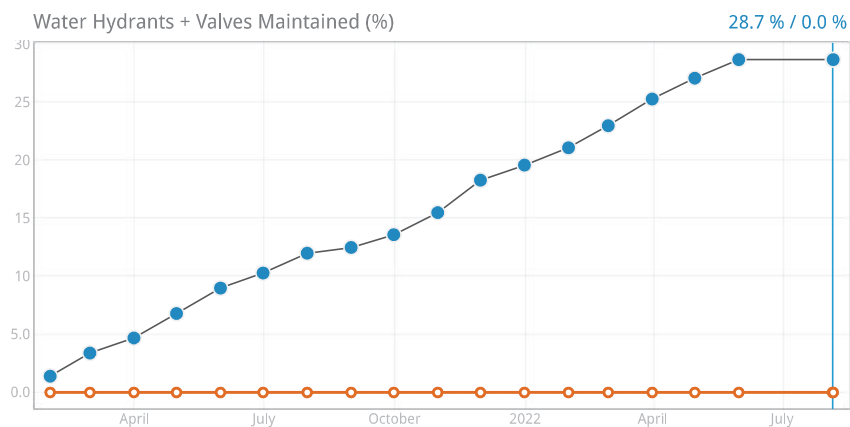
Performance Metrics



[Back to Focus Area Dashboard](#)

Targeted Result: Proactive hydrant & valve maintenance

Water Hydrants + Valves Maintained (%) current value: 28.7%



Targeted Result: Fewer sewer overflows

Sanitary Sewer Overflows current value: 0

No Data Available.



Organizational and Operational Improvement Dashboard



What Does Success Look Like for the Focus Area?

Optimize organizational structure, alignment, and capacity to ensure safe operations and efficient service delivery.

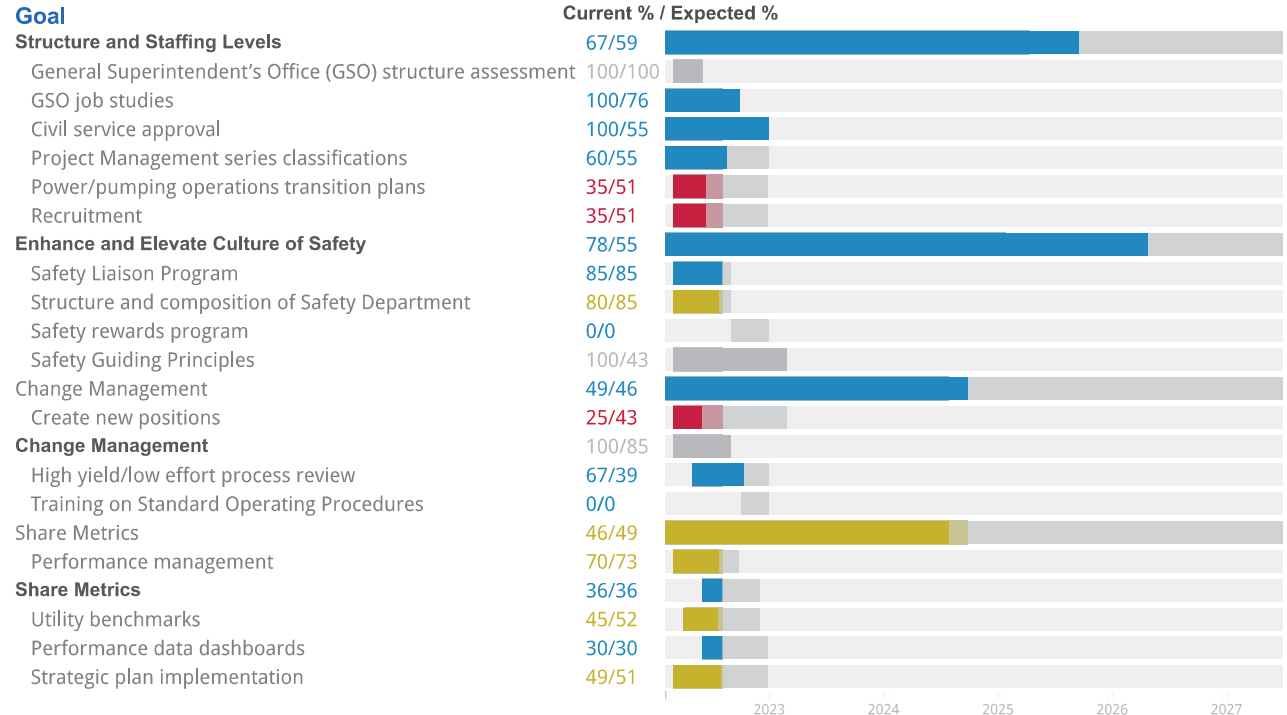
Overall Focus Area Progress: 60%

What Goals and Tactics Impact the Focus Area?

[Back to Strategic Framework](#)

[View 2022 Workplan](#)

[View Metric Details](#)



How is Performance of the Focus Area Measured?

Employee Sustained Injuries (ESIs)

5.0

Target: 0.0

Lost Time to Injury

2.0

Target: 0.0

O&M Cost per Water Account (\$)

56

Target: 0

O&M Cost per WW Account (\$)

176

Target: 0

Completed Process Improvement Projects

2

Target: 3

Organizational and Operational Improvement

Goal and Tactic Details

[Back to Focus Area Dashboard](#)

Goal 1: Structure and Staffing Levels

Evaluate and modify organizational structure and staffing levels.

Goal Progress:
67%

Goal Lead:
Kaitlin Tymrak

Tactics:

General Superintendent's Office (GSO) structure assessment

Tactic Owner: Kaitlin Tymrak | **Progress:** 100% | **End Date:** 05/31/22

Complete the General Superintendent's Office (GSO) structure assessment to realign staff with needs.

Progress Notes:

3.28: Complete per Kaitlin Tymrak.

GSO job studies

Tactic Owner: Kaitlin Tymrak | **Progress:** 100% | **End Date:** 09/30/22

Complete job studies for Deputy General Superintendents and USSA/SEDM/USA/EDM level for GSO.

Progress Notes:

Progress updated from 75% to 100% : 8/4/22: Complete for 2022, more positions will be added in 2023 Workplan.

Civil service approval

Tactic Owner: Kaitlin Tymrak | **Progress:** 100% | **End Date:** 12/31/22

Obtain approval from civil service for Deputy General Superintendents and USSA/USA/SEDM/EDM levels.

Progress Notes:

Progress updated from 75% to 100% : 8/4/22: Complete for 2022, will add additional positions in 2023 Workplan.

Project Management series classifications

Tactic Owner: Rebecca Johnsey | **Progress:** 60% | **End Date:** 12/31/22

Develop Project Management series classifications and propose to Civil Service.

Progress Notes:

Progress updated from 50% to 60% : 8/2/22 Update: Job studies and descriptions complete, submitted to CS.

Organizational and Operational Improvement

Goal and Tactic Details

[Back to Focus Area Dashboard](#)

Goal 1: Structure and Staffing Levels (cont.)

Evaluate and modify organizational structure and staffing levels.

Goal Progress:
67%

Goal Lead:
Kaitlin Tymrak

Tactics:

Power/pumping operations transition plans

Tactic Owner: Kaitlin Tymrak | **Progress:** 35% | **End Date:** 12/31/22

Develop a framework for a training program and preliminary transition plan for staff assigned to power/pumping operations (from current operating paradigm to West Power Complex).

Progress Notes:

Progress updated from 0% to 35% : 6.17: Preliminary framework has been formulated. Additional support needed.

Power/pumping operations transition plans

Tactic Owner: Kaitlin Tymrak | **Progress:** 35% | **End Date:** 12/31/22

Develop a framework for a training program and preliminary transition plan for staff assigned to power/pumping operations (from current operating paradigm to West Power Complex).

Progress Notes:

Progress updated from 0% to 35% : 6.17: Preliminary framework has been formulated. Additional support needed.

Organizational and Operational Improvement

Goal and Tactic Details

[Back to Focus Area Dashboard](#)

Goal 2: Enhance and Elevate Culture of Safety

Advocate and implement a safety culture throughout SWBNO.

Goal Progress:
78%

Goal Lead:
Chad Fava

Tactics:

Safety Liaison Program

Tactic Owner: Chad Fava | **Progress:** 85% | **End Date:** 08/31/22

Review the existing 'Safety Liaison Program' for effectiveness and impact and recommend modifications.

Progress Notes:

Progress updated from 0% to 85% : 6/21 update: Review complete. Need additional upper management support to allow employees time to dedicate to program.

Structure and composition of Safety Department

Tactic Owner: Chad Fava | **Progress:** 80% | **End Date:** 08/31/22

Review and document the Safety Department structure and composition to align with actual and future needs and to achieve the Department's vision.

Progress Notes:

Progress updated from 0% to 80% : 6/21 update: structure complete, awaiting CS and HR approval.

Safety rewards program

Tactic Owner: Chad Fava | **Progress:** 0% | **End Date:** 12/31/22

Develop a proposal to establish a safety rewards program.

Progress Notes:

Scheduled to begin in September 2022.

Safety Guiding Principles

Tactic Owner: Chad Fava | **Progress:** 100% | **End Date:** 02/28/23

Develop a set of Safety Guiding Principles for the organization and present them to leadership for buy-in and widespread communication

Progress Notes:

Progress updated from 0% to 100% : 6/21 update: Safety Manual has been updated regarding all safety principles.



Organizational and Operational Improvement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 3: Change Management

Implement programs and training related to change management, process standardization, and continuous improvement.

Goal Progress:
49%

Goal Lead:
Jackie Spencer

Tactics:

Create new positions

Tactic Owner: Tyler Antrup | **Progress:** 25% | **End Date:** 03/01/23

Create a Continuous Improvement Officer (CIO) position and a business analyst position to support data gathering, monitoring, and reporting.

Progress Notes:

Progress updated from 0% to 25% : 6.17: Continuous improvement job study draft complete. Need to circulate for review.

High yield/low effort processes

Tactic Owner: Jackie Spencer | **Progress:** 100% | **End Date:** 09/01/22

Identify up to 5 high yield/low effort processes that can be reviewed and improved in the next 12 months.

Progress Notes:

Progress updated from 0% to 100% : 6.17: Six opportunities identified: contract routing, contract final acceptance, damage assessment, high-level departmental org charts, list of functional responsibilities, update intranet.

High yield/low effort process review

Tactic Owner: Jackie Spencer | **Progress:** 67% | **End Date:** 12/31/22

Identify small teams to review and improve the selected high yield/low effort processes.

Progress Notes:

Progress updated from 40% to 67%

Training on Standard Operating Procedures

Tactic Owner: Jackie Spencer | **Progress:** 0% | **End Date:** 12/31/22

Establish an SOP working group by identifying key personnel throughout the organization who own organizational processes.

Progress Notes:

Scheduled to begin in October 2022.



Organizational and Operational Improvement

Goal and Tactic Details



[Back to Focus Area Dashboard](#)

Goal 4: Share Metrics

Develop and share organizational performance metrics internally and externally.

Goal Progress:
46%

Goal Lead:
Tyler Antrup

Tactics:

Performance management

Tactic Owner: Tyler Antrup | **Progress:** 70% | **End Date:** 09/30/22

Solicit feedback from the Leadership Team (or designees) on what data they feel is important to share internally and externally for performance management.

Progress Notes:

Progress updated from 0% to 70% : 6.17: Metrics for all Focus Areas identified, Board feedback received. Finalize at August Board meeting.

Data availability and location

Tactic Owner: Tyler Antrup | **Progress:** 36% | **End Date:** 11/30/22

Based on responses from the Leadership Team, inventory existing data availability and data location.

Progress Notes:

Progress updated from 20% to 36% : 8:5 Progress being made. Metrics being identified and added to the dashboards

Utility benchmarks

Tactic Owner: Tyler Antrup | **Progress:** 45% | **End Date:** 11/30/22

Identify specific measures to benchmark against the industry and peer utilities.

Progress Notes:

Progress updated from 31% to 45% : 8:5 Benchmarks being identified and added to dashboards which are being used to establish targets in the dashboarding system

Performance data dashboards

Tactic Owner: Tyler Antrup | **Progress:** 30% | **End Date:** 12/31/22

Identify targets for performance data shared via dashboards.

Progress Notes:

Progress updated from 15% to 30% : 8:5 Performance targets being added

Strategic plan implementation

Tactic Owner: Tyler Antrup | **Progress:** 49% | **End Date:** 12/31/22

Track the strategic plan implementation process.

Progress Notes:

Progress updated from 35% to 49% : 8:5 Mid-year progress report presented to the SWBNO Board Strategy Committee



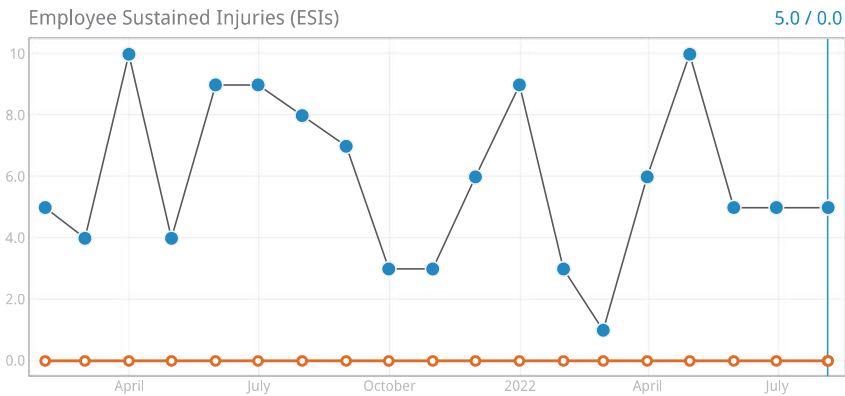
Organizational and Operational Improvement Performance Metrics



[Back to Focus Area Dashboard](#)

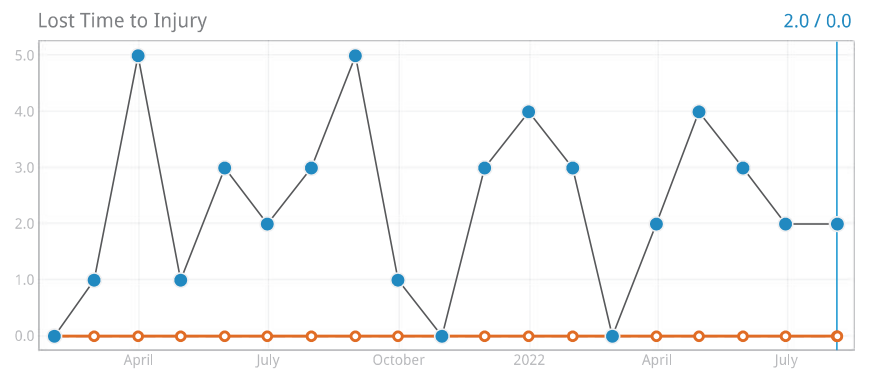
Targeted Result: Fewer workplace injuries and illnesses

Employee Sustained Injuries (ESIs) current value: 5.0



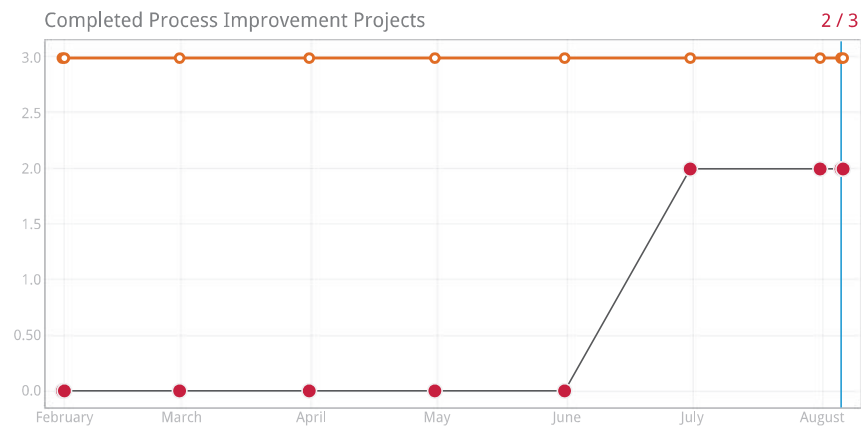
Targeted Result: Less time away due to injury

Lost Time to Injury current value: 2.0



Targeted Result: More operational processes improved

Completed Process Improvement Projects current value: 2





Organizational and Operational Improvement Performance Metrics



[Back to Focus Area Dashboard](#)

Targeted Result: Lower cost of water service

O&M Cost per Water Account (\$) current value: \$56

No Data Available.

Targeted Result: Lower cost of wastewater service

O&M Cost per WW Account (\$) current value: \$176

No Data Available.

Strategic Plan Six-Month Update

Tyler Antrup
Director of Planning + Strategy

Board of Directors Strategy Committee
August 9, 2022



Key Updates

- Implementation Working Groups are continuing to meet and complete tactics
- Working Groups are maturing into venues for overall problem-solving and communication amongst staff
- Dashboard development is complete
- Still waiting on some data on a few focus areas





Implementation Next Steps

- Continue to track metric progress to determine if tactic completion is driving progress
- Working Groups add new work as tactics are completed to continue working towards goals and results
- Begin 2023 Workplan development in the coming months to build on success of 2022 progress
- Moving Focus Area specific deep dives to a recurring schedule before the Operations Committee

Utility Master Planning



Background

- Began discussions in Fall of 2019
- Developed a framework that began with the Strategic Plan and moved to System Planning
- Released Master Planning RFI
- Strategic Plan complete





RFI Workshop Takeaways

- **Funding**

SWBNO needs to develop a long-term funding source and funding plan for maintenance and capital improvements.

- **Transformational Approaches**

Holistic approaches that balance the water, wastewater, and stormwater issues are needed – connections to groundwater, other city departments, and regional issues must also be incorporated.

- **Action Towards Progress**

Need achievable short-term goals to show progress (both in master planning process and its implementation)

- **Community-Centered Vision**

Meaningful community engagement is necessary, both immediate and long-term.

- **Technology and Innovative Tools**

Planning for the future requires exploration of different approaches that may not conform to current thinking.

- **One-Water Framework**

A “one water” approach to planning will be required for success of the effort, however a single plan process for all three systems will likely be difficult to manage and deliver results.



Master Plan

- Determine the capability of existing systems and project future needs to maintain/achieve level of service
- Identify innovative, more efficient, and cost-effective ways to meet expected needs and address emerging issues
- Estimate the magnitude, cost, and timing of and prioritize needed capital and operations related projects
- Generate institutional and community support for needed projects and funding plan
- Create a capital improvement plan for needed improvements to infrastructure



Master Plan Example

Water Distribution Plan

- Inventory of system assets
- Development of a hydraulic model for the water distribution system
- Modelling future levels of service
- Detailed capital program for addressing all system needs

Table 3-2
Summary of Water Main Lengths (Linear Feet) and Materials
East Bank^{1,2}

Pipe Material	Pipe Diameter (Inches)					Total (Linear Feet)	Percent (%)
	8 or under	9-16	18-27	30-48	48-54		
Cast Iron	3,219,700	757,600	128,400	74,900	2,600	4,183,200	57.3
Asbestos Cement	1,558,700	429,000	13,600	17,700	8,200	2,027,200	27.7
PVC/Plastic	358,000	107,400	5,700	6,900	-	478,000	6.5
Other ³	256,600	47,100	18,300	58,300	12,300	392,600	5.4
Steel	300	600	800	70,200	94,600	166,500	2.3
Prestressed Concrete	-	-	-	41,300	-	41,300	0.6
Ductile Iron	5,400	2,300	7,400	-	-	15,100	0.2
Total (Linear Feet)	5,398,700	1,344,000	174,200	269,300	117,700	7,303,900	100
Percent (%)	73.9	18.4	2.4	3.7	1.6	100.0	

Notes:

1 - Data compiled from CassWorks and rounded to the nearest hundred feet

2 - Data excludes pipe segments at the Carrollton Plant

3 - "Other" pipe material not identified

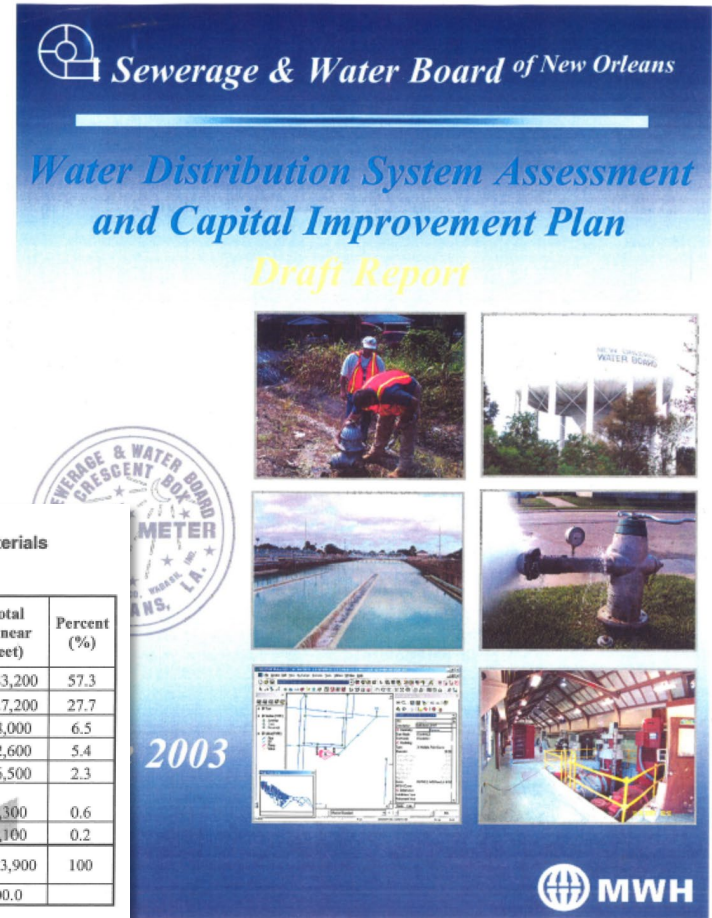
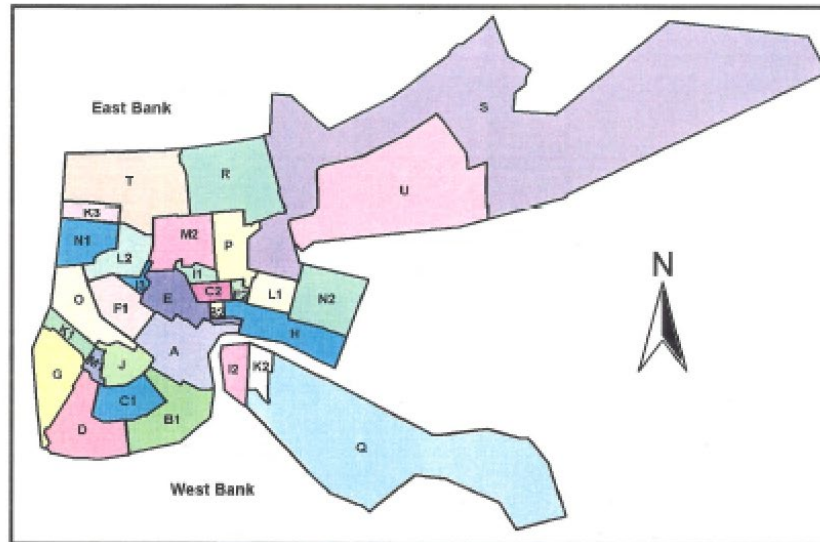
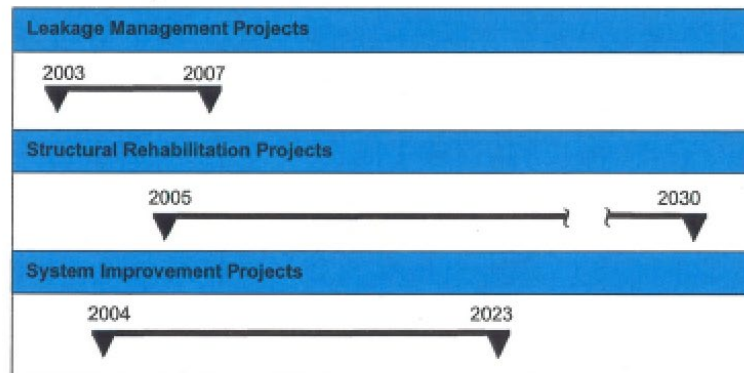


Figure ES-2
Structural Rehabilitation Project Areas



The projects are grouped into one of three categories: leakage management (4), structural rehabilitation (21), or system improvements (6), as shown in the summary schedule for the CIP in Figure ES-3 below.

Figure ES-3
CIP Summary Schedule



Note:
1 – Not to scale.

Table ES-1
Estimated Cost for Proposed Projects

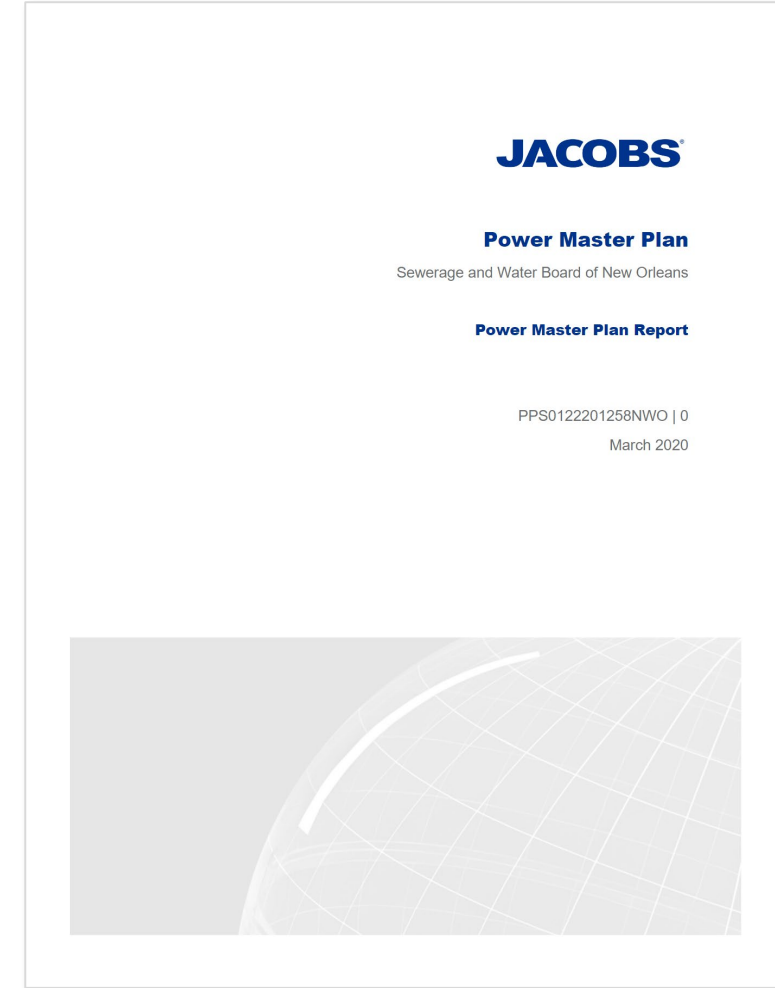
Project Group	Project Description	Capital Cost (\$1,000)
I. Leakage Management Projects	Washout Valve Inspection	\$ 150
	Valve and Hydrant Inspection and Maintenance	\$ 5,720
	Pilot District Metering Area (four areas) Implementation	\$ 1,440
	Leakage Management Program	\$ 5,950
	<i>Inflation</i>	\$ 990
	Subtotal	\$ 14,250
II. Structural Rehabilitation	Rehabilitation in Project Area A	\$ 181,000
	Rehabilitation in Project Areas B1,B2	\$ 158,000
	Rehabilitation in Project Areas C1,C2	\$ 142,000
	Rehabilitation in Project Area D	\$ 127,000
	Rehabilitation in Project Area E	\$ 110,000
	Rehabilitation in Project Areas F1,F2	\$ 92,000
	Rehabilitation in Project Area G	\$ 131,000
	Rehabilitation in Project Area H	\$ 108,000
	Rehabilitation in Project Areas I1,I2,I3	\$ 83,000
	Rehabilitation in Project Area J	\$ 74,000
	Rehabilitation in Project Areas K1,K2,K3	\$ 34,000
	Rehabilitation in Project Areas L1,L2	\$ 93,000
	Rehabilitation in Project Areas M1,M2	\$ 71,000
	Rehabilitation in Project Areas N1,N2	\$ 71,000
	Rehabilitation in Project Area O	\$ 78,000
	Rehabilitation in Project Area P	\$ 78,000
	Rehabilitation in Project Area Q	\$ 54,000
	Rehabilitation in Project Area R	\$ 61,000
	Rehabilitation in Project Area S	\$ 66,000
	Rehabilitation in Project Area T	\$ 57,000
	Rehabilitation in Project Area U	\$ 55,000
	<i>Inflation</i>	\$ 836,940
	Subtotal	\$2,760,940
III. System Improvement Projects	Customer Meter Inspection and Maintenance Program	\$ 16,000
	GIS Data Management Implementation and Update	\$ 3,000
	System Optimization and Analysis	\$ 1,000
	Water Purification Plants Audit	\$ 150
	SCADA Installation and Data Automation	\$ 3,750
	Purification Plant Flow Meters Installation	\$ 1,000
	<i>Inflation</i>	\$ 8,220
	Subtotal	\$ 33,120
	Total Capital Cost	\$2,808,310



Master Plan Example

Power Master Plan

- Technical analysis of power needs and current system capabilities
- Alternatives analysis and selected option
- Capital program for implementation





Challenges

Capacity

- Limited bandwidth within GSO to manage long-term planning

Customer Credibility

- Ongoing customer service challenges inhibit outreach and visioning opportunities

Funding

- Can request for Fair Share funding for planning efforts



Path Forward- Planning

- Slower start of “Master Plan” with more targeted system technical plans
 - Begin with Water Purification Master Plan
 - Already working on WWTPs – can adapt this work into more formal plans
 - Update 2003 Water Distribution Plan
 - Working to complete sewer system model – will be critical input in future plans
 - Move to Stormwater/Drainage once we demonstrate success with others

Water Purification

- Both plants are aging and need significant investments to meet new water quality regulations
- Limited knowledge of new treatment technologies or magnitude of cost
- Existing funding focused on repair projects or piecemeal investments that do not benefit our customers in the long-term





Path Forward- Community

- Developing a Public Water Academy along with Customer Advisory Committee to tell our story and build trust
- Community listening sessions with Executive Director, Leadership Team, and Board Members to build trust and guide future outreach approach
- Continue to meet with community partners
- Suggestions on partnerships?

For More Information:
www.swbno.org/Projects/Planning



SWBNewOrleans
(504) 52-WATER

Tyler Antrup
Director of Strategy + Planning
tantrup@swbno.org

