Operations Committee Meeting Agenda

I. Roll Call

II. Presentation Item

a)   Alternative Meter Reading Strategy – Chief Customer Service Officer, Rene Gonzalez

III. Discussion Item

a)   OIG Audit: JIRR Coordination – Executive Director, Ghassan Korban

b)   People Plan Update – Chief of Staff, Christy Harowski

c)   Strategic Plan Implementation Dashboard Review - Director of Strategic Planning, Tyler Antrup

IV. Public Comment

V. Adjournment

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
Goal	Value
Optimize Capital and Operational Spending	59/71
Budget Development	80/75
Revenue Sources	68/70
Affordability Programs	87/77

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
Goal	Value
Software Solutions	69/77
System Resiliency	74/77
Adoption and Integration	67/70

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
Goal	Value
Workforce Model Options	36/36
Training and Development	44/46
Motivate and Train Supervisors	48/53
Internal Communication	39/55
Succession Planning	49/57

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.

Goals
Goal	Value
Culture of Customer Service	72/74
Improve Self-Service Options	82/87
Service Delivery Performance	76/70
Proactive Communication	80/76

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
Goal	Value
Comprehensive Asset Management	84/66
Renew Aged Infrastructure	63/62
Improve Collaboration	66/71
System Master Plans	38/12

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
Goal	Value
Structure and Staffing Levels	89/78
Enhance and Elevate Culture of Safety	91/68
Change Management	69/64
Share Metrics	75/75

Focus Area Champion:
Kaitlin Tymrak, Business Services Lead

Results

15.6 Delinquency Rate (%)	**56,602,762** Aged Accounts ($)	**0.02** Assistance Program Utilization (%)
69.4 Unaccounted for Water	**183** Days Cash on Hand - Water	**84,295,994** YTD Capital Spend
		246,587 CIP Change Orders

128 IT Training Attendance	**4.1** Phishing Test Failure Rate	**89** Help Desk Phone Calls
0 E-Bills	**0** Billing Errors	

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

3,516 Customer Disputes	**59** Meter Reads (% Actual vs. Estimated)	**79** Avg. Dispute Resolution (days)
6 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 Injuries Leading to Absence	**5** Employee Sustained Injuries (ESIs)	**2** Completed Process Improvement Projects
79 O&M Cost per Water Account ($)	**81** O&M Cost per WW Account ($)	

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: 73%

What Goals and Tactics Impact the Focus Area?

Goal	Current % / Expected %
Optimize Capital and Operational Spending	59/71
Inventory and Prioritize Vendors	25/71
Review purchasing policies	100/100
Budget approval prior to purchases	62/65
Develop, update, and regularly share policies regarding cap...	60/59
Monitoring and reporting against capital spending forecasts	70/71
Budget Development	80/75
Analyzing monthly budgets	70/71
Increase transparency and accountability	84/71
Effective budgeting practices	100/100
Revenue Sources	68/70
Designate and expand the Project Delivery Unit (PDU)	68/68
Identify industry best practices	65/68
Generate additional revenues	71/71
Increase revenue recovery	69/71
Affordability Programs	87/77
Rate Study Outcomes	95/71
Monitor and consolidate resources	80/72
Increase revenues for affordability program	86/89
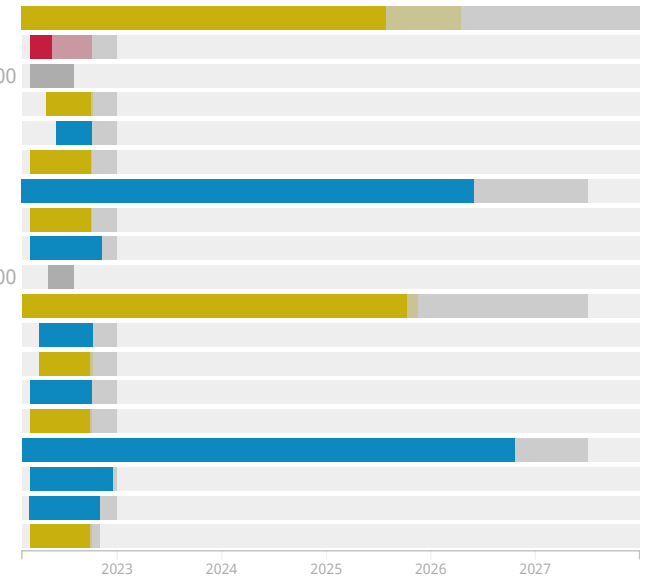
2023   2024   2025   2026   2027

How is Performance of the Focus Area Measured?

Delinquency Rate (%)
15.6%
Target: 0.0%

Aged Accounts ($)
$56,602,762
Target: $0

Assistance Programming
0.02%
Target: 0%

Unaccounted for Water
69.4%
Target: 0.0%

Days Cash on Hand - Water
183
Target: 90

Days Cash on Hand - Sewer
194
Target: 90

YTD Capital Spend
$84,295,994
Target: $286,970,750

CIP Change Orders
$0
Target: $0

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Financial Stability
Goal and Tactic Details

Goal 1: Optimize Capital and Operational Spending

Optimize capital and operational spending.

Goal Progress:
59%

Goal Lead:
Cashanna Moses

Tactics:

Inventory and Prioritize Vendors
Tactic Owner: TBD | **Progress:** 25% |
End Date: 12-31-2022
Inventory and analyze significant spending across commodities and prioritize relationships with vendors that have the most advantageous terms for SWBNO.

Progress Notes:
Progress updated from 0% to 25%
9.28: Continuing to work with key vendors to advance this tactic. Progress is being made by working with key suppliers (e.g., our uniform vendor). Staffing shortages are preventing a holistic approach to this tactic at this time. We will focus on advancing this tactic in 2023.

Review purchasing policies
Tactic Owner: Cash Moses | **Progress:** 100% |
End Date: 07-31-2022

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

Progress Notes:
9.28: Policy is complete and is now in effect.

Budget approval prior to purchases
Tactic Owner: Dexter Joseph | **Progress:** 62% |
End Date: 12-30-2022
Continue to monitor and minimize out-of-budget spending while using our current financial management system. Going forward, we will integrate stronger controls in the new financial management system (software) to require strict adherence to purchases that conform to budget limitations.

Progress Notes:
9.28: Current efforts involve manual review of requisitions and budgets. Requisition forms have been modified to help enforce in-budget requisitions on purchases up to $30,000.

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Financial Stability
Goal and Tactic Details

Goal 1: Optimize Capital and Operational Spending (cont.)

Optimize capital and operational spending.

Goal Progress:
59%

Goal Lead:
Cashanna Moses

Tactics:

Develop, update, and regularly share policies regarding capital spending

Tactic Owner: Cash Moses | **Progress:** 60% |
End Date: 12-31-2022
Work with departments to develop a workflow focused on creating one standard process for capital spending.

Progress Notes:
9.28: We have revised the Capital Budget Authority form. Provide monthly appropriations report to GSO's office.

Monitoring and reporting against capital spending forecasts

Tactic Owner: Kevin Garrison | **Progress:** 70% |
End Date: 12-31-2022
Check-in quarterly and forecast capital funding sources and usage to increase spending transparency.

Progress Notes:
Progress updated from 67% to 70%
9.28: PAYGO model has been updated, allowing better visibility on forecasting capital project financing requirements. We have a sustained meeting frequency between financial management and capital project management, which enhances our ability to forecast capital spending more accurately.

Goal 2: Budget Development

Enhance budget development and management processes.

Goal Progress:
80%

Goal Lead:
Kevin Garrison

Tactics:

Analyzing monthly budgets
Tactic Owner: Kevin Garrison | **Progress:** 70% |
End Date: 12-31-2022
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 66% to 70%
9.28: Monthly and quarterly budget performance reports have been developed and submitted. CFO engaged in enhanced communication across the organization regarding budget awareness.

Increase transparency and accountability
Tactic Owner: Kevin Garrison | **Progress:** 84% |
End Date: 12-31-2022
Designate and consistently work with the organization to increase transparency and accountability with departments in support of financial planning.

Progress Notes:
9.28: Continue to have meetings and conduct outreach across the organization to ensure need, understanding, education, and awareness regarding overall budget transparency and accountability.

Effective budgeting practices
Tactic Owner: Dexter Joseph | **Progress:** 100% |
End Date: 07-31-2022
Identify peer organizations that have effective budgeting practices and develop recommendations for improvements.

Progress Notes:
6.16: Developed contacts with peer cities and the GFOA. Currently analyzing findings from meetings with those contacts.

Financial Stability
Goal and Tactic Details

Goal 3: Revenue Sources

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

Goal Progress:
68%

Goal Lead:
Monique Rainey, LaTressia Matthews

Tactics:

Designate and expand the Project Delivery Unit (PDU)
Tactic Owner: Monique Rainey | **Progress:** 68% |
End Date: 12-31-2022
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:
9.28: Preparing to add a position to the PDU to leverage available state and federal funding. Once the new hire is in place, we will create an SOP for pursuing grant funding opportunities.

Generate additional revenues
Tactic Owner: Tyler Antrup | **Progress:** 71% |
End Date: 12-31-2022

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:
9.29 Update: Working with industry groups to obtain case study information. On track to complete by EOY.

Identify industry best practices
Tactic Owner: Tamika Hyde | **Progress:** 65% |
End Date: 12-31-2022
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 46% to 65%
9.28: SWBNO staff are engaging national associations, including AWWA, WEF, and stormwater professional associations to continue to identify and consider adoption of best practices across our organization. Recent focus is on best practices associated with stormwater drainage fees.

Increase revenue recovery
Tactic Owner: Stephanie Thomas | **Progress:** 69% |
End Date: 12-31-2022
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:
Progress updated from 0% to 69%
9.28: Significant improvement in delinquent account revenue recovery has been made recently. SWBNO currently working the City's amnesty program to enhance revenue recovery.

Financial Stability
Goal and Tactic Details

Goal 4: Affordability Programs

Enhance affordability programs to better meet community needs.

Goal Progress:
87%

Goal Lead:
Tyler Antrup

Tactics:

Rate Study Outcomes
Tactic Owner: Tyler Antrup | **Progress:** 95% |
End Date: 12-31-2022
Include affordability outcomes in the rate study and the next rate case.

Progress Notes:
Progress updated from 80% to 95%
9.29 Update: Financial Plan draft complete including affordability outcomes and enhanced CAP.

Monitor and consolidate resources
Tactic Owner: Christy Harowski | **Progress:** 80% |
End Date: 12-31-2022
Monitor and consolidate resources on external affordability programs (e.g., federal/state programs, renter programs, community action group funding).

Progress Notes:
9.28: Recent progress associated with funding from the federal LIWAP program and City's Rent Assistance Program.

Increase revenues for affordability program
Tactic Owner: Tiffany Julien | **Progress:** 86% |
End Date: 10-31-2022
Evaluate and investigate opportunities to increase revenues for affordability program.

Progress Notes:
Progress updated from 75% to 86%
9.28: As part of the current rate study, consideration is currently being given to expand the resources associated with our water help program.
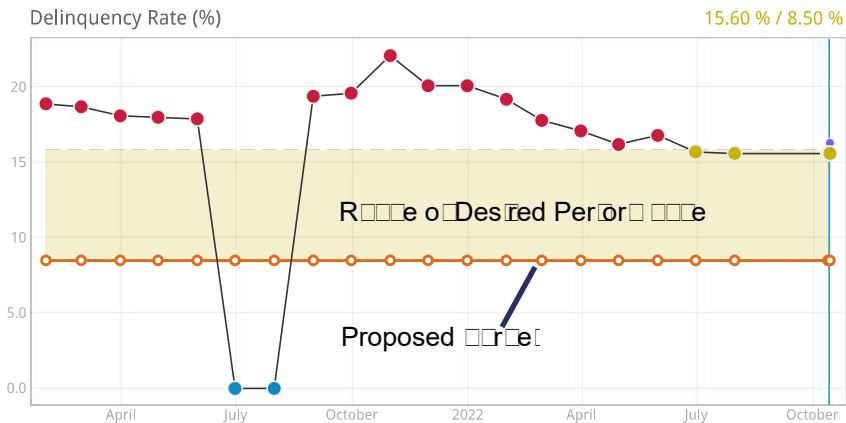
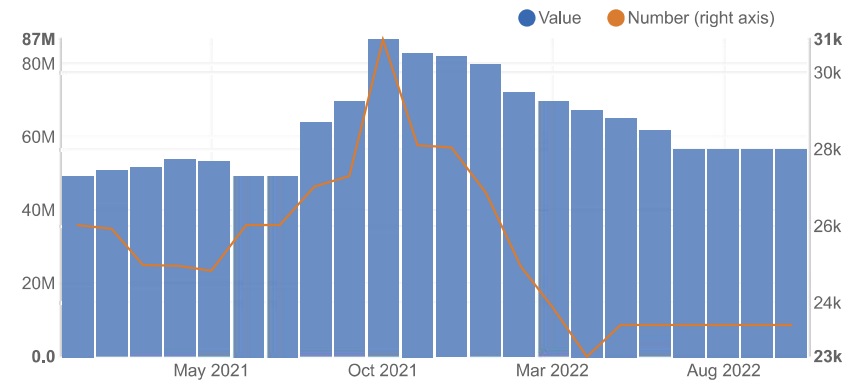# Financial Stability
Performance Metrics

Targeted Result: Lower delinquency rate

Delinquency Rate (%) current value: 15.60%

Targeted Result: Fewer accounts delinquent >60 days

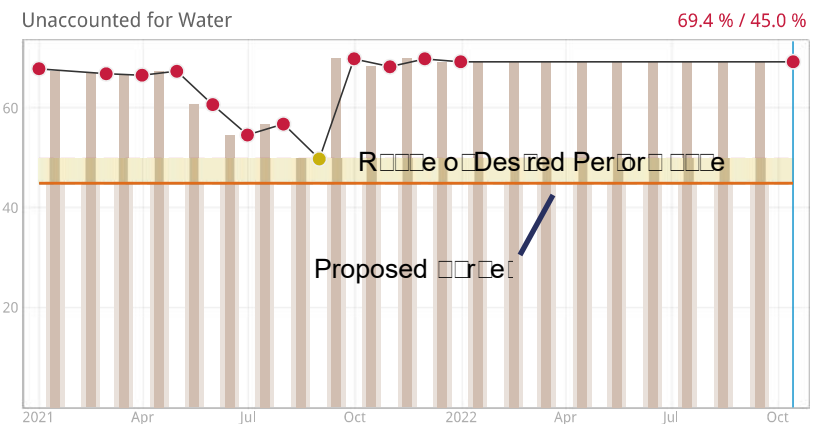Aged Accounts ($) current value: $56,602,762; current number: 23,428

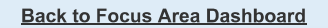**Targeted Result:** Increased utilization of assistance programs
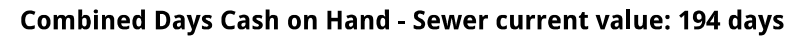
Assistance Program Utilization (%) current value: 0.02%

Targeted Result: Reduction in unbilled water

Unaccounted for Water current value: 69.4

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Financial Stability
Performance Metrics

Targeted Result: **Healthy cash reserves for water**

Combined Days Cash on Hand - Water current value: 183 days

Days Cash on Hand - Water   183 / 90

Proposed Target

Targeted Result: **Healthy cash reserves for sewer**

Combined Days Cash on Hand - Sewer current value: 194 days

Days Cash on Hand - Sewer   194 / 90

Proposed Target

Targeted Result: **Fewer capital project change orders**

CIP Change Orders current value: $; current number:

No Data Available.

Targeted Result: **Maximal capital outlays**

YTD Capital Spend current value: $84,295,994

● Actual   ● Budget

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: 70%

What Goals and Tactics Impact the Focus Area?

Goal	Current % / Expected %
Software Solutions	69/77
Inventory current software/systems	100/100
New Software Systems Needs Assessments	64/71
Technology updates	87/89
Document Management	58/71
System Resiliency	74/77
Cybersecurity policies	100/100
AWIA assessment recommendations	100/71
Cybersecurity for new employees	100/100
Video technology	25/71
Radio networks	58/71
Firewall installation	90/74
Adoption and Integration	67/70
SWBNO employee technology systems & resource commun...	69/71
Technology-related skills assessment	66/68

2023   2024   2025   2026   2027

How is Performance of the Focus Area Measured?

IT Training Attendance	Phishing Test Failure Rate	Help Desk Phone Calls	E-Bills	Billing Errors
128	**4.1%**	**89**	**0.0%**	**0.0%**
Target: 0	Target: 0.0%	Target: 0	Target: 0.0%	Target: 1.5%

Technology Modernization
Goal and Tactic Details

Goal 1: Software Solutions

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

Goal Progress:
69%

Goal Lead:
Melinda Nelson

Tactics:

Inventory current software/systems
Tactic Owner: Melinda Nelson | **Progress:** 100% |
End Date: 04-01-2022
Inventory current software/systems and post list of major and minor software on intranet.

Progress Notes:
6.16: Inventory is complete.

New Software Systems Needs Assessments
Tactic Owner: Melinda Nelson | **Progress:** 64% |
End Date: 12-31-2022
Complete needs assessment and requirements analysis for the Asset Management and new Financial software systems through collaboration across the organization.

Progress Notes:
9.26: Waiting on final selection of the consulting engineer that will serve as the owner-agent for the AM procurement.

Technology updates
Tactic Owner: Melinda Nelson | **Progress:** 87% |
End Date: 10-31-2022
Document, prioritize, and maintain the list of technology updates that are underway or being considered.

Progress Notes:
9.26: Waiting on budget requests to be complete by the first week of October.

Document Management
Tactic Owner: Yolanda Grinstead (Chanelle Collins?) |
Progress: 58% | **End Date:** 12-31-2022
Produce a formal recommendation that addresses SWBNO's current document management needs.

Progress Notes:
9.26: No update at this time. Awaiting budgetary approval for document management position.

Technology Modernization
Goal and Tactic Details

Goal 2: System Resiliency

Enhance cybersecurity and technology systems resiliency.

Goal Progress:
74%

Goal Lead:
Guy Lombard

Tactics:

Cybersecurity policies
Tactic Owner: Guy Lombard | **Progress:** 100% |
End Date: 08-31-2022
Document cybersecurity policies, communicate relevant policies, and select and deploy training resources.

Progress Notes:
8.26: Documentation complete.

AWIA assessment recommendations
Tactic Owner: Guy Lombard | **Progress:** 100% |
End Date: 12-31-2022
Select, purchase, and deploy two cybersecurity software systems in support of the AWIA assessment.

Progress Notes:
8.8: Complete: 2 software systems implemented, as per plan.

Cybersecurity for new employees
Tactic Owner: Melinda Nelson | **Progress:** 100% |
End Date: 06-30-2022
Expand the orientation module on cybersecurity for new employees (and include user agreement)

Progress Notes:
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:** 25% |
End Date: 12-31-2022
Increase the use of video technology for operational/safety/security use.

Progress Notes:
9.26: Planning to request Rule 95 until we can have an RFP Approved and go through the bidding process in 2023.

Radio networks
Tactic Owner: Rebecca Johnsey | **Progress:** 58% |
End Date: 12-31-2022
Develop a plan to expand the radio networks so that SCADA, security, and IT have separate dedicated radio frequencies.

Progress Notes:
9.26: Melinda to connect with Becca Johnsey for an update.

Firewall installation
Tactic Owner: Curtis Clark | **Progress:** 90% |
End Date: 12-31-2022
Complete firewall installation.

Progress Notes:
9.26: Project remains on schedule, expect completion by the end of 2022.

Technology Modernization
Goal and Tactic Details

Goal 3: Adoption and Integration

Improve adoption and integration of current and new technology systems.

Goal Progress:
67%

Goal Lead:
Melinda Nelson

Tactics:

SWBNO employee technology systems & resource communication
Tactic Owner: Melinda Nelson | **Progress:** 69% |
End Date: 12-31-2022
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:
9.26: All training materials are nearing completion. Those materials are being customized for two groups: managers and other SWBNO staff. Training will commence in 2023.

Technology-related skills assessment
Tactic Owner: TBD (Labarron McClendon) | **Progress:** 66% | **End Date:** 12-31-2022
As a component of the training program, complete an assessment of the technology-related skills needed by job position or department

Progress Notes:
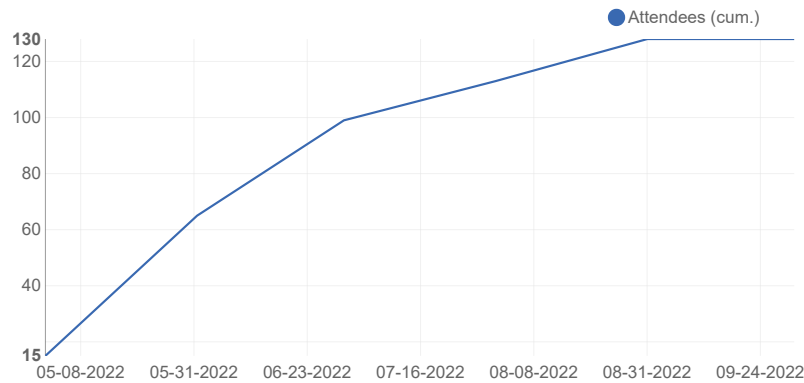9.26: Still evaluating the method and approach we want to take to complete the needed assessment.

Technology Modernization
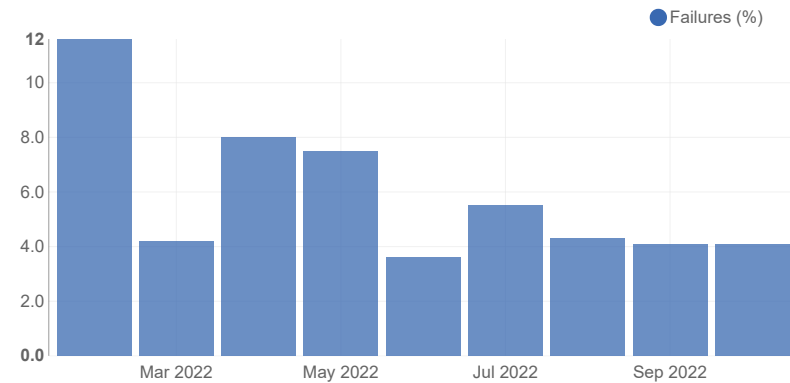## Performance Metrics

Targeted Result: **More employees attending IT trainings**
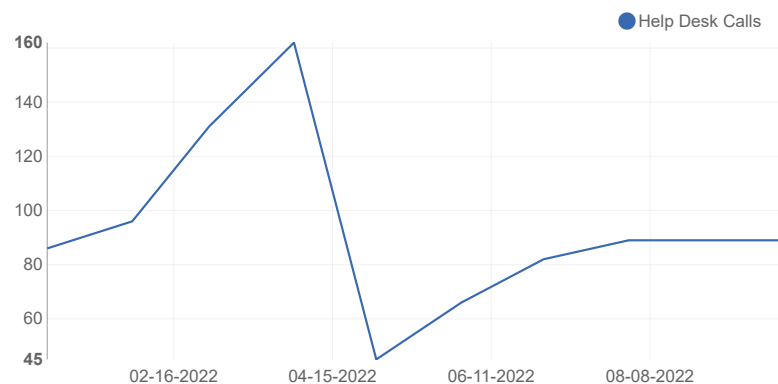
IT Training Attendance current value YTD: 128

Targeted Result: **Fewer phishing test email links clicked**

Phishing Test Failure Rate current value: 4.1%

Targeted Result: **Fewer help desk phone calls for IT issues**

Help Desk Phone Calls current value: 89

Technology Modernization
Performance Metrics

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.

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.
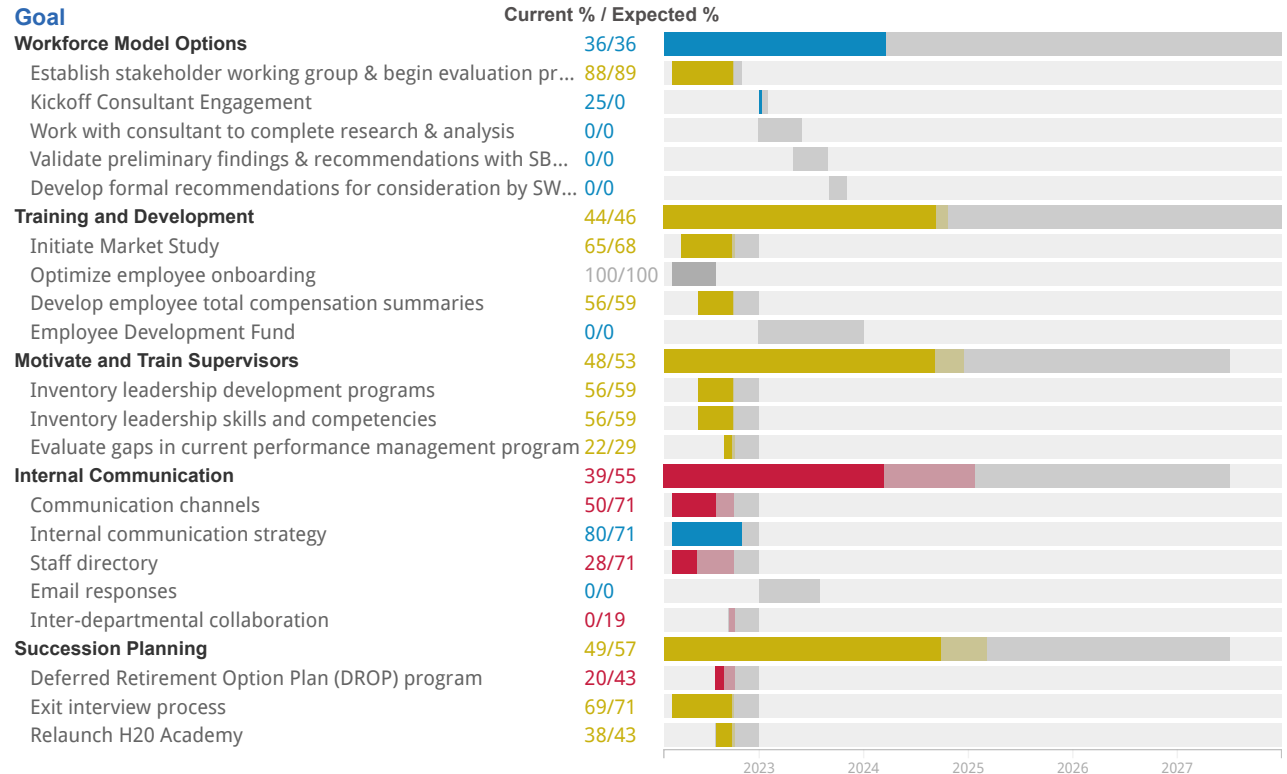
Overall Focus Area Progress: 43%

What Goals and Tactics Impact the Focus Area?

Goal	Current % / Expected %
Workforce Model Options	36/36
Establish stakeholder working group & begin evaluation pr...	88/89
Kickoff Consultant Engagement	25/0
Work with consultant to complete research & analysis	0/0
Validate preliminary findings & recommendations with SB...	0/0
Develop formal recommendations for consideration by SW...	0/0
Training and Development	44/46
Initiate Market Study	65/68
Optimize employee onboarding	100/100
Develop employee total compensation summaries	56/59
Employee Development Fund	0/0
Motivate and Train Supervisors	48/53
Inventory leadership development programs	56/59
Inventory leadership skills and competencies	56/59
Evaluate gaps in current performance management program	22/29
Internal Communication	39/55
Communication channels	50/71
Internal communication strategy	80/71
Staff directory	28/71
Email responses	0/0
Inter-departmental collaboration	0/19
Succession Planning	49/57
Deferred Retirement Option Plan (DROP) program	20/43
Exit interview process	69/71
Relaunch H20 Academy	38/43

2023 2024 2025 2026 2027

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

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 & begin evaluation process
Tactic Owner: Christy Harowski | **Progress:** 88% | **End Date:** 10-31-2022
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, inclusive of identifying funding and resources to conduct assessment.

Progress Notes:
9.28: Working group is established and cooperative endeavor agreement (CEA) with the Greater New Orleans Foundation has been approved by Board of Directors. Anticipate issuing RFP for consulting support by end of October.

Kickoff Consultant Engagement
Tactic Owner: WG | **Progress:** 25% | **End Date:** 01-31-2023

Engage with the external consultant to identify current issues and opportunities

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.

Work with consultant to complete research & analysis
Tactic Owner: WG | **Progress:** 0% | **End Date:** 05-31-2023
Steering committee provides guidance

Progress Notes:

Scheduled to begin in July 2022.

Validate preliminary findings & recommendations with SBWNO workforce
Tactic Owner: Consultant/WG | **Progress:** 0% | **End Date:** 08-31-2023
Engage SWBNO staff to solicit input on initial findings and recommendations

Progress Notes:

Scheduled to begin in December 2022.

Workforce Development and Enrichment
Goal and Tactic Details

Goal 2: Training and Development

Enhance resources for employee training and development.

Goal Progress:
44%

Goal Lead:
Labarron McClendon

Tactics:

Initiate Market Study
Tactic Owner: Labarron McClendon, Lenia Segura | **Progress:** 65% | **End Date:** 12-31-2022
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 45% to 65%
9.28: Adding the cost of a market study to our FY23 budget request. Our own internal efforts have resulted in pay increases which will take effect in 2023 as well. The pay increases planned for 2023 will be incorporated in the market study.

Employee Development Fund
Tactic Owner: TBD Finance/CS | **Progress:** 0% | **End Date:** 12-31-2023

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:** 07-31-2022
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:** 56% | **End Date:** 12-31-2022

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

Progress Notes:
Progress updated from 30% to 56%
9.28: Currently planning on sending the first summaries out in December 2022.

Goal 3: Motivate and Train Supervisors

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

Goal Progress:
48%

Goal Lead:
Miera Moore;
Kimberly Batiste

Tactics:

Inventory leadership development programs
Tactic Owner: Miera Moore; Kimberly Batiste | **Progress:** 56% | **End Date:** 12-31-2022
Inventory existing leadership development and training requirements

Progress Notes:
Progress updated from 30% to 56%
9.28: Evaluated current programs and are working with an outside consultant to identify additional program needs.

Inventory leadership skills and competencies
Tactic Owner: Miera Moore; Kimberly Batiste | **Progress:** 56% | **End Date:** 12-31-2022
Identify required skills and competencies for supervisors and leadership positions

Progress Notes:
Progress updated from 30% to 56%
9.28: SWBNO HR is working with our outside consultant and systematically working through various supervisory and leadership positions to identify gaps in skills and competencies.

Evaluate gaps in current performance management program
Tactic Owner: Miera Moore; Kimberly Batiste | **Progress:** 22% | **End Date:** 12-31-2022
Document current performance management approach and developed enhanced program to be implemented in 2023.

Progress Notes:
Progress updated from 0% to 22%
9.28: Program evaluation is underway. Assembling documentation to inform enhanced approach for 2023.

Workforce Development and Enrichment
Goal and Tactic Details

Goal 4: Internal Communication

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

Goal Progress:
39%

Goal Lead:
Corwin Washington

Tactics:

Communication channels
Tactic Owner: Grace Birch/HDR | **Progress:** 50% | **End Date:** 12-31-2022
Inventory internal communication channels

Progress Notes:
Awaiting Q3 update.

Internal communication strategy
Tactic Owner: Grace Birch | **Progress:** 80% | **End Date:** 12-31-2022
Work with HDR Engineering to develop an internal communication strategy

Progress Notes:
Awaiting Q3 update.

Staff directory
Tactic Owner: Employee Relations/ HR | **Progress:** 28% | **End Date:** 12-31-2022

Maintain a complete staff directory for intranet and emergency call trees

Progress Notes:
Awaiting Q3 update.

Email responses
Tactic Owner: Corwin Washington | **Progress:** 0% | **End Date:** 07-31-2023
Develop corporate norms around email responses (out of office responses, time to respond service levels, etc.)

Progress Notes:
This tactic will begin in 2023.

Inter-departmental collaboration
Tactic Owner: Becca Johnsey | **Progress:** 0% | **End Date:** 12-31-2022
Assign personnel in each department to ensure that project updates are current in shared folder to support inter-departmental collaboration

Progress Notes:
Awaiting Q3 update.

Workforce Development and Enrichment
Goal and Tactic Details

Goal 5: Succession Planning

Improve knowledge capture, transfer, and succession planning.

Goal Progress:
49%

Goal Lead:
Irma Plummer

Tactics:

Deferred Retirement Option Plan (DROP) program
Tactic Owner: Yolanda Grinstead; Irma Plummer | **Progress:** 20% | **End Date:** 12-31-2022
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:
9.28: Will focus on understanding the current configuration of DROP and develop preliminary recommendations regarding modifications to support suppression planning before the end of 2022.

Exit interview process
Tactic Owner: Kimberly Batiste | **Progress:** 69% | **End Date:** 12-31-2022
Evaluate options to enhance the current exit interview process.

Progress Notes:
Progress updated from 51% to 69%
9.28: Exist interviews take place on a routine basis.

Relaunch H20 Academy
Tactic Owner: Dave Callahan | **Progress:** 38% | **End Date:** 12-31-2022
Restart the H20 Academy.

Progress Notes:
Progress updated from 23% to 38%
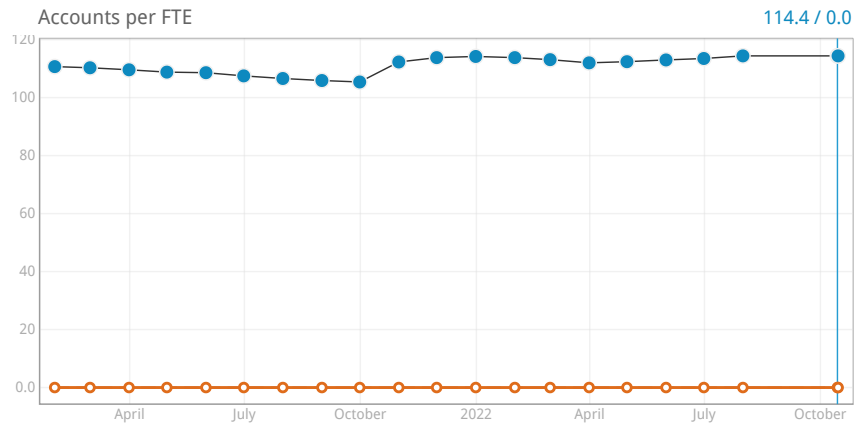9.28: Plans remain on track to restart H20 Academy in 2022.

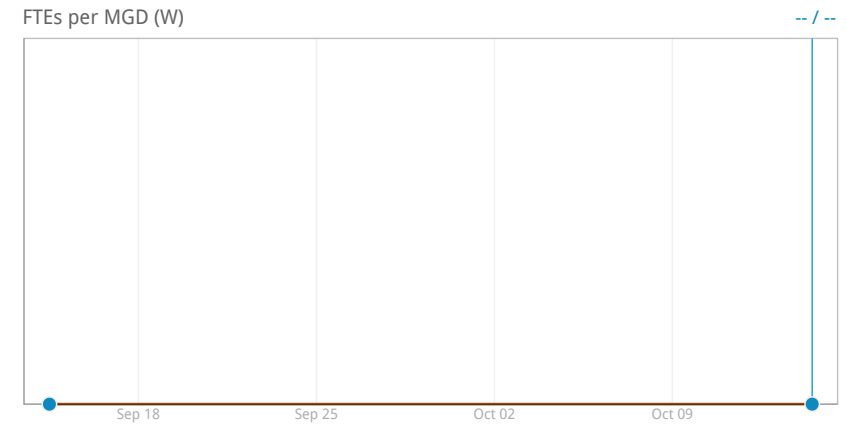# Workforce Development and Enrichment
Performance Metrics

Targeted Result: More accounts per FTE

Accounts per FTE current value: 114.4

Accounts per FTE   114.4 / 0.0

Targeted Result: Fewer FTEs per MGD of water

FTEs per MGD (W) current value: 0.0

FTEs per MGD (W)   -- / --

Targeted Result: Fewer FTEs per MGD of WW

FTEs per MGD (WW) current value: 0.0

FTEs per MGD (WW)   -- / --

21

Workforce Development and Enrichment
Performance Metrics

Targeted Result: Fewer open positions
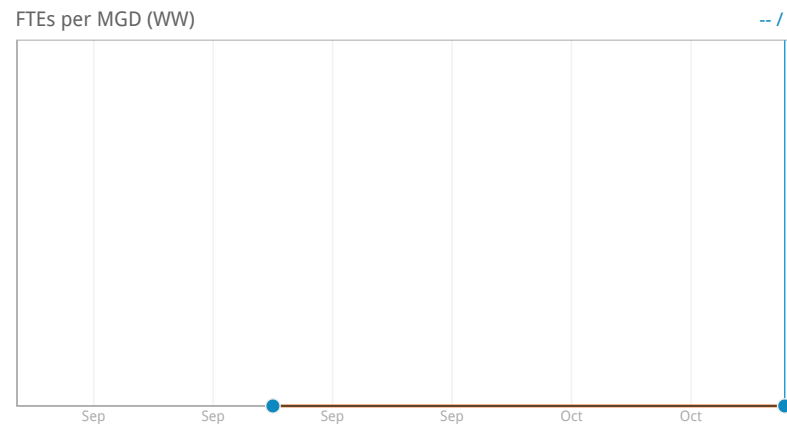
Open Positions (# of Positions) for water and sewer current value: 404

Open Positions (# of Positions)   404 / 88

Proposed Target

Range of Desired Performance

Targeted Result: Fewer resignations

Voluntary Turnover (# of Staff) current value: 2

Voluntary Turnover (# of Staff)   2 / 9

Range of Desired Performance

Proposed Target

Targeted Result: More employee training hours

Training Hours current value: 0

Training Hours   -- / --
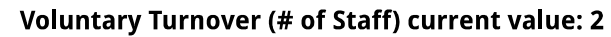
Customer Service Excellence and Stakeholder Engagement
Dashboard

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: 77%

What Goals and Tactics Impact the Focus Area?

Goal	Current % / Expected %
Culture of Customer Service	72/74
Customer service representative training	100/100
Skills and competencies gap analysis	80/79
Training needs assessment	0/6
Customer service on-boarding program	100/100
Continuous improvement pilot program	69/71
Improve Self Service Options	82/87
Customer payment options	100/100
Implement Verint support	70/80
Multi-lingual resources	85/88
Customer payment locations	100/100
Service Delivery Performance	76/70
Resource Meter Readers	100/71
Meter reading incentives	75/68
Enhance customer education resources	65/68
Customer service surveys	54/71
Meter reading accuracy	100/71
Customer dispute process	65/68
Proactive Communication	80/76
Identify organizational (external) communication needs	71/74
Perform communication needs gap analysis	69/71
Communication outreach plan	72/74
Customer-facing dashboard	100/100
Continue advancing specific messaging initiatives	100/71

Years: 2023, 2024, 2025, 2026, 2027

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
3,516	**79**	**6**	**59.0%**	**16,781**	**3**
Target: 0	Target: 0	Target: 0	Target: 0.0%	Target: 0	Target: 0

23

Customer Service Excellence and Stakeholder Engagement
Goal and Tactic Details

Goal 1: Culture of Customer Service

Foster a culture of customer service throughout the organization.

Goal Progress:
72%

Goal Lead:
Rene Gonzalez

Tactics:

Customer service representative training
Tactic Owner: Nichol Green | **Progress:** 100% | **End Date:** 06-30-2022
Inventory existing training and technology used to support customer-facing representatives.

Progress Notes:
8.4: All training and technology resources have been inventoried and documented.

Skills and competencies gap analysis
Tactic Owner: Rene Gonzalez (+CS Leadership) | **Progress:** 80% | **End Date:** 10-31-2022
Conduct a gap analysis between current and desired skills and competencies.

Progress Notes:
Progress updated from 41% to 80%

9.28: Completed gap analysis and list of desired skills for most customer-facing positions. Beginning to work with field staff departments to identify gaps and desired skills.

Training needs assessment
Tactic Owner: Rene Gonzalez (+CS Leadership) | **Progress:** 0% | **End Date:** 12-31-2022
Identify and deploy high-impact training and tools that can help bridge the gap, including refresher training.

Progress Notes:
On schedule to begin this activity on October 1st.

Customer service on-boarding program
Tactic Owner: Matt LaFrance | **Progress:** 100% | **End Date:** 07-31-2022
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:
8.4: Customer service content has been incorporated into the onboarding program.

Continuous improvement pilot program
Tactic Owner: Rene Gonzalez, Gabe Bordenave | **Progress:** 69% | **End Date:** 12-31-2022
Advance a continuous improvement pilot program within Customer Service

Progress Notes:
Progress updated from 55% to 69%

9.28: Customer Service leadership and staff continue to work on training and continuous improvement structure and activities for the Customer Service group. This could serve as a model for the entire organization.

Goal 2: Improve Self-Service Options

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

Goal Progress:
82%

Goal Lead:
Stephanie Thomas

Tactics:

Customer payment options
Tactic Owner: Tiffany Julien | **Progress:** 100% | **End Date:** 06-01-2022
Investigate additional customer payment options.

Progress Notes:
6.16: Complete; work has begun adding additional payment options.

Implement Verint support
Tactic Owner: Gabe Bordenave | **Progress:** 70% | **End Date:** 11-30-2022
Implement Verint support for Customer Relationship Management (CRM) software.

Progress Notes:
9.28: Continue to work through integration. Our expectation is that we will meet the full integration by the end of November.

Multi-lingual resources
Tactic Owner: Waldeen Mitchell | **Progress:** 85% | **End Date:** 10-31-2022
Inventory and explore increased multi-lingual resources (website, printed materials, etc.).

Progress Notes:
Progress updated from 77% to 85%
9.28: On track to complete by end of October. Having ongoing collaborations with partner agencies.

Customer payment locations
Tactic Owner: Stephanie Thomas | **Progress:** 100% | **End Date:** 06-30-2022
Evaluate opportunities to expand and promote Fidelity Express and increase customer payment locations.

Progress Notes:
6.16: Complete; currently focused on transitioning to new capability.

Customer Service Excellence and Stakeholder Engagement
Goal and Tactic Details

Goal 3: Service Delivery Performance

Elevate core customer service delivery performance.

Goal Progress:
76%

Goal Lead:
Monique Chatters

Tactics:

Resource Meter Readers
Tactic Owner: Rene Gonzalez, Monique Chatters | **Progress:** 100% | **End Date:** 12-31-2022
Identify and procure vehicles to resource Meter Readers.

Progress Notes:
9.28: Complete; meter readers are sufficiently equipped.

Enhance customer education resources
Tactic Owner: Whitney Bentley | **Progress:** 65% | **End Date:** 12-31-2022
Inventory, assess, and improve resources to help customers understand high and estimated bills.

Progress Notes:
Progress updated from 62% to 65%
9.28: Continuing to explore and develop communication instruments that will educate our customers.

Meter reading incentives
Tactic Owner: Monique Chatters, Patricia Davenport, Andrea El-Mansura | **Progress:** 75% | **End Date:** 12-31-2022
Evaluate and recommend improvements to the meter reading incentive program.

Progress Notes:
9.28: Continuing to focus on maintaining appropriate staffing levels. A significant part of this strategy is evaluating and improving meter reading incentives.

Goal 3: Service Delivery Performance (cont.)

Elevate core customer service delivery performance.

Goal Progress:
76%

Goal Lead:
Monique Chatters

Tactics:

Customer service surveys

Tactic Owner: Rene Gonzalez | **Progress:** 54% | **End Date:** 12-31-2022
Develop a strategy to deploy a customer service survey - transactional and full customer base.

Progress Notes:
9.28: Currently working to understand the timing and identify support resources. The expectation is to submit a survey in 2023.

Meter reading accuracy

Tactic Owner: Andrea El-Mansura | **Progress:** 100% | **End Date:** 12-31-2022
Implement a quality control/audit program for meter reading accuracy.

Progress Notes:
6.16: Complete; current focus is on tracking, monitoring, and assessing employee performance.

Customer dispute process

Tactic Owner: Chris Robertson | **Progress:** 65% | **End Date:** 12-31-2022
Review and streamline the customer dispute process.

Progress Notes:
Progress updated from 50% to 65%
9.28: Working with City Council and, specifically, the Customer Service Task Force, SWBNO is examining all aspects of the customer billing process and dispute processes. This is inclusive of examining schedules for billing, existing policies concerning billing and disputes, as well as enhanced training of staff in the areas of billing, customer service, and dispute resolution. Some structural changes to the organizational chart are being considered. We expect changes in Q4 22 in the area of bill print and mailing. In 2023, additional improvements will be implemented.

Goal 4: Proactive Communication

Advance proactive communication and outreach programs.

Goal Progress:
80%

Goal Lead:
Grace Birch

Tactics:

Identify organizational (external) communication needs
Tactic Owner: Grace Birch | **Progress:** 71% | **End Date:** 12-31-2022
Identify organizational communication and outreach needs and resources.

Progress Notes:
Progress updated from 57% to 71%
9.28: Current focus is updating the Citizens/Public Water Academy. We have planned community outreach events scheduled for Q4 22.

Perform communication needs gap analysis
Tactic Owner: Grace Birch | **Progress:** 69% | **End Date:** 12-31-2022
Perform a gap assessment and develop a communication roadmap for customer communications.

Progress Notes:
Progress updated from 80% to 69%
9.28: A Community Outreach Specialist will be starting on October 3rd and working to fill two more public relations positions by the end of Q4 22.

Continue advancing specific messaging initiatives
Tactic Owner: Grace Birch | **Progress:** 100% | **End Date:** 12-31-2022
Create specific/tailored messaging

Progress Notes:
9.28: Water quality report and annual update are complete. Established a schedule for future communication initiatives.

Communication outreach plan
Tactic Owner: Grace Birch | **Progress:** 72% | **End Date:** 12-31-2022
Develop and deliver a comprehensive communication outreach plan.

Progress Notes:
Progress updated from 61% to 72%
9.28: All communications planning efforts are currently coming together through the use of specific campaigns that are scheduled quarterly. Campaign examples include Smart Metering, Rate Study, and the Fee Forgiveness Program.

Customer-facing dashboard
Tactic Owner: Grace Birch | **Progress:** 100% | **End Date:** 08-31-2022
Develop customer-facing dashboards with data that is meaningful for them.

Progress Notes:
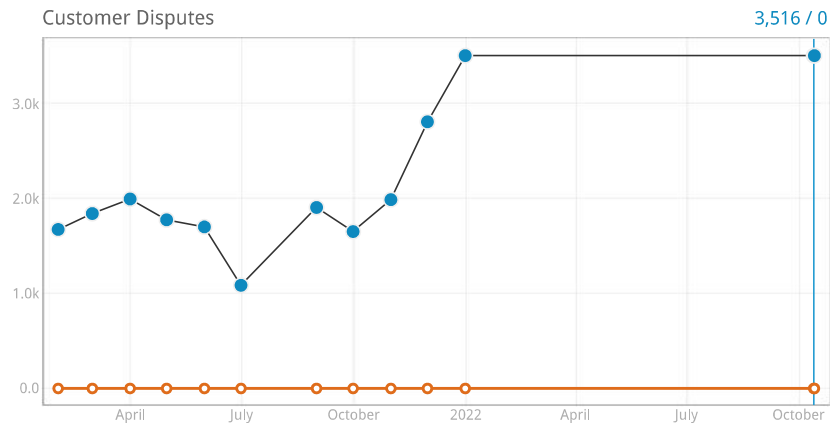9.28: Externally facing customer service dashboards are complete.

Targeted Result: **Fewer customer disputes**

Customer Disputes current value: 3,516

Customer Disputes — 3,516 / 0

Targeted Result: **Fewer days to resolve billing disputes**

Avg. Dispute Resolution (days) current value: 79

Avg. Dispute Resolution (days) — 79 / 45

Range of Desired Performance

Proposed Target
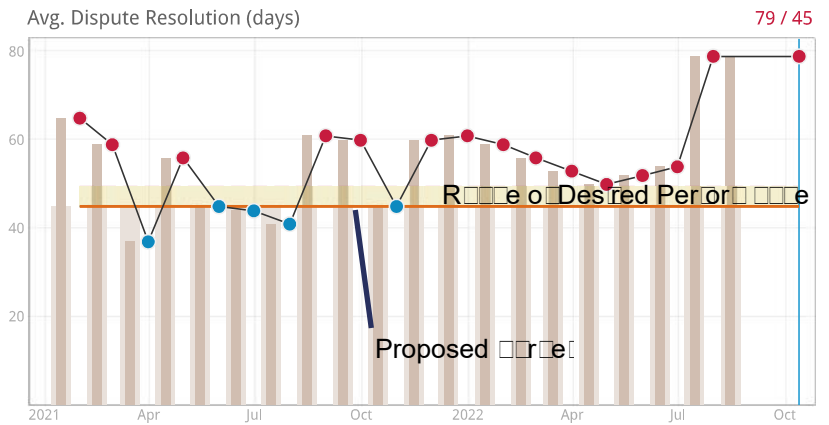
Targeted Result: **All estimated meter reads completed**

Meter Reads (% Actual vs. Estimated) current value: 59.0%

● % Read

Customer Service Excellence and Stakeholder Engagement
Performance Metrics

Targeted Result: Reduction in phone hold times
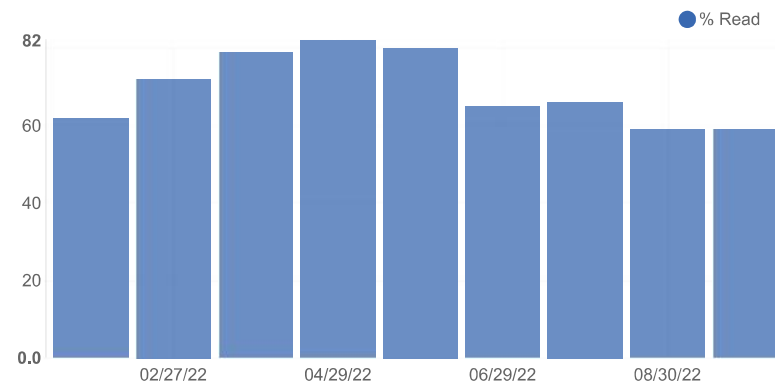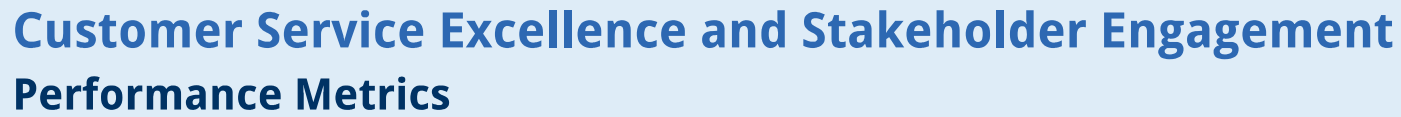
Avg. Speed of Answer (min) current value: 6

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: 63%

What Goals and Tactics Impact the Focus Area?

Goal	Current % / Expected %
Comprehensive Asset Management	84/66
Preliminary Risk Assessment	100/100
Comprehensive AM Needs Assessment	55/53
AM Working Group	100/65
Renew Aged Infrastructure	63/62
Catalogue resource needs	80/71
Integrated planning efforts	30/43
Improve Collaboration	66/71
Communicate capital delivery	57/71
Contract management process	75/71
System Master Plans	38/12
Sewerage model	90/27
Storm planning and models	50/12
System Master Planning	50/43
Greenhouse gas emissions	15/29
Begin System Plans	0/0

2023 2024 2025 2026 2027

How is Performance of the Focus Area Measured?

Pipe Renewal & Replacement (%)	Sewer Manholes Inspected (%)	Sewer Lines Cleaned (%)	Water Hydrants + Valves Maintained (%)	Sanitary Sewer Overflows
0.0%	**2.53%**	**14.63**	**28.7%**	**0**
Target: 0.0%	Target: 1.00%	Target: 14.28	Target: 0.0%	Target: 0

Infrastructure Resiliency and Reliability
Goal and Tactic Details

Goal 1: Comprehensive Asset Management

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

Goal Progress:
84%

Goal Lead:
Fred Tharp, David

Cappel, Ashraf
Abdelbaqi

Tactics:

Preliminary Risk Assessment
Tactic Owner: | **Progress:** 100% | **End Date:** 05-01-2022

Progress Notes:
Progress updated from 0% to 100% : 6.17: Preliminary risk assessment complete. Current focus is on conducting comprehensive needs assessment.

Comprehensive AM Needs Assessment
Tactic Owner: Kaitlin Tymrak, Robert Hicks | **Progress:** 55% | **End Date:** 12-31-2022
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 25% to 55%
9.29 Update: Scope outline created and comments from group accepted and incorporated into draft. Keeping tabs on PS RFQ to track potential procurement.

AM Working Group
Tactic Owner: Ron Spooner, Charles Sauerwin | **Progress:** 100% | **End Date:** 12-31-2022
Form an internal AM working group by 2023 to meet on a monthly basis.

Progress Notes:
Progress updated from 86% to 100%
9.29 Update: Working group formed concurrent with Implementation Working Group and already meeting monthly.

Goal 2: Renew Aged Infrastructure

Replace and renew aged infrastructure using integrated approaches.

Goal Progress:

63%

Goal Lead:
Steven Giang

Tactics:

Catalogue resource needs
Tactic Owner: Kaitlin Tymrak | **Progress:** 80% | **End Date:** 12-31-2022
Catalogue resource needs across water, wastewater, and stormwater drainage systems

Progress Notes:
9.29 Update: 2023 Budget process will help with refining needs. Will plan to meet in the next month or so to update memo.

Integrated planning efforts
Tactic Owner: Ron Spooner | **Progress:** 30% | **End Date:** 12-31-2022
Ensure sufficient resources for integrated planning efforts by communicating needs and value to the Board, stakeholders, and the public.

Progress Notes:
Progress updated from 10% to 30%
9.29 Update: Presented framework to Board. Will request funding in 2023 Budget. On track to begin planning in 2023.

Goal 3: Improve Collaboration

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

Goal Progress:
66%

Goal Lead:
Chris Bergeron

Tactics:

Communicate capital delivery
Tactic Owner: Ron Spooner | **Progress:** 57% | **End Date:** 12-31-2022
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 Breaux | **Progress:** 75% | **End Date:** 12-31-2022
Conduct an assessment of contract management process to improve consistency and streamline processes.

Progress Notes:
Progress updated from 78% to 75%
9.29 Update: Continuing inventory of process that need to be optimized for contract routing.

Goal 4: System Master Plans

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

Goal Progress:
38%

Goal Lead:
Tyler Antrup

Tactics:

System Master Planning
Tactic Owner: Tyler Antrup | **Progress:** 50% | **End Date:** 12-31-2022
Work with Board of Directors and Leadership Team to develop a framework for overall integrated system master planning efforts.

Progress Notes:
Progress updated from 0% to 50%
9.29 Update: Received positive feedback at Strategy Committee. Continuing to refine framework and on track to begin work in 2023.

Begin System Plans
Tactic Owner: Tyler Antrup | **Progress:** 0% | **End Date:** 07-01-2027
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:** 90% | **End Date:** 07-31-2024
Complete the sewerage model.

Progress Notes:
Progress updated from 40% to 90%
9.29 Update: Model largely complete. Continuing to refine and calibrate and use for project planning.

Storm planning and models
Tactic Owner: Jason Higginbotham | **Progress:** 50% | **End Date:** 07-01-2027
Update models and implement plans for stronger storms.

Progress Notes:
Progress updated from 0% to 50%
9.29 Update: SWMM Model 95% complete. Reviewing draft plans and working on prioritization of projects going forward.

Greenhouse gas emissions

Tactic Owner: Felicia Bergeron | **Progress:** 15% | **End Date:** 12-31-2022
Develop strategies to reduce greenhouse gas emissions to target levels.

Progress Notes:
Progress updated from 0% to 15%
9.29 Update: Will meet to discuss strategies.

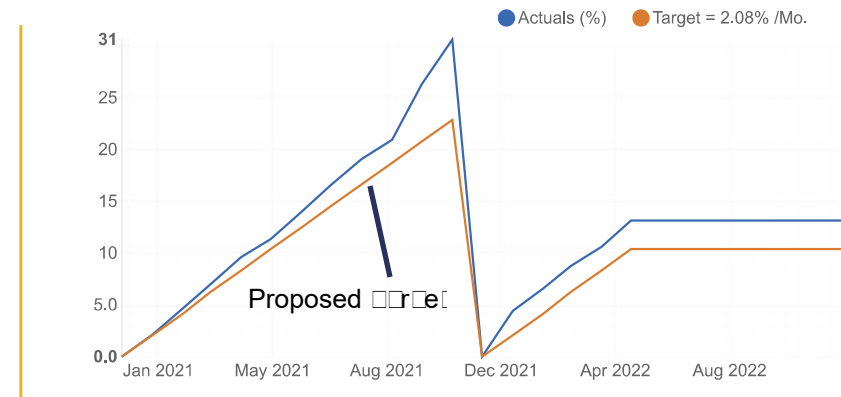# Infrastructure Resiliency and Reliability
Performance Metrics

Targeted Result: **Increased pipe renewal & replacement**

Pipe Renewal & Replacement (%) current value: 0.0%
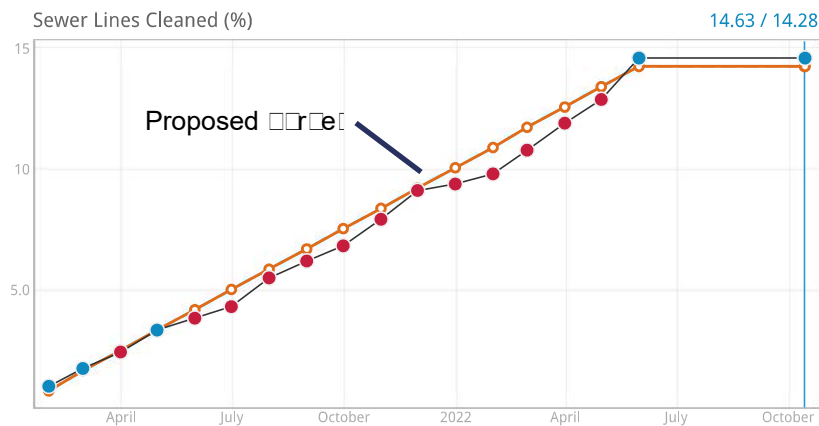
No Data Available.

Targeted Result: **More proactive manhole inspections**

Sewer Manholes Inspected (%) current cumulative value: 13.15%

Targeted Result: **More miles of sewer cleaned**

Sewer Lines Cleaned (%) current cumulative value: 14.63%

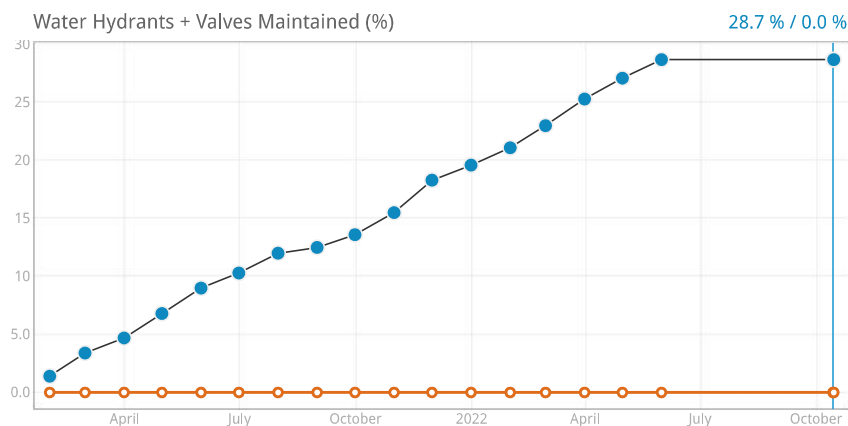

36
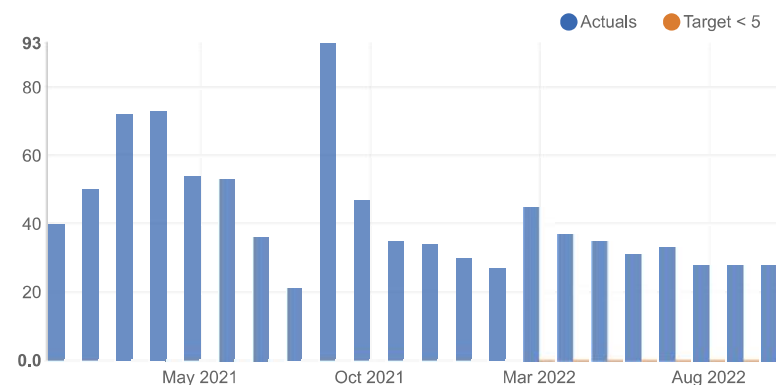
Infrastructure Resiliency and Reliability
Performance Metrics

Targeted Result: Proactive hydrant & valve maintenance

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

Water Hydrants + Valves Maintained (%)   28.7 % / 0.0 %

Targeted Result: Fewer sewer overflows

Sanitary Sewer Overflows current value: 28

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.
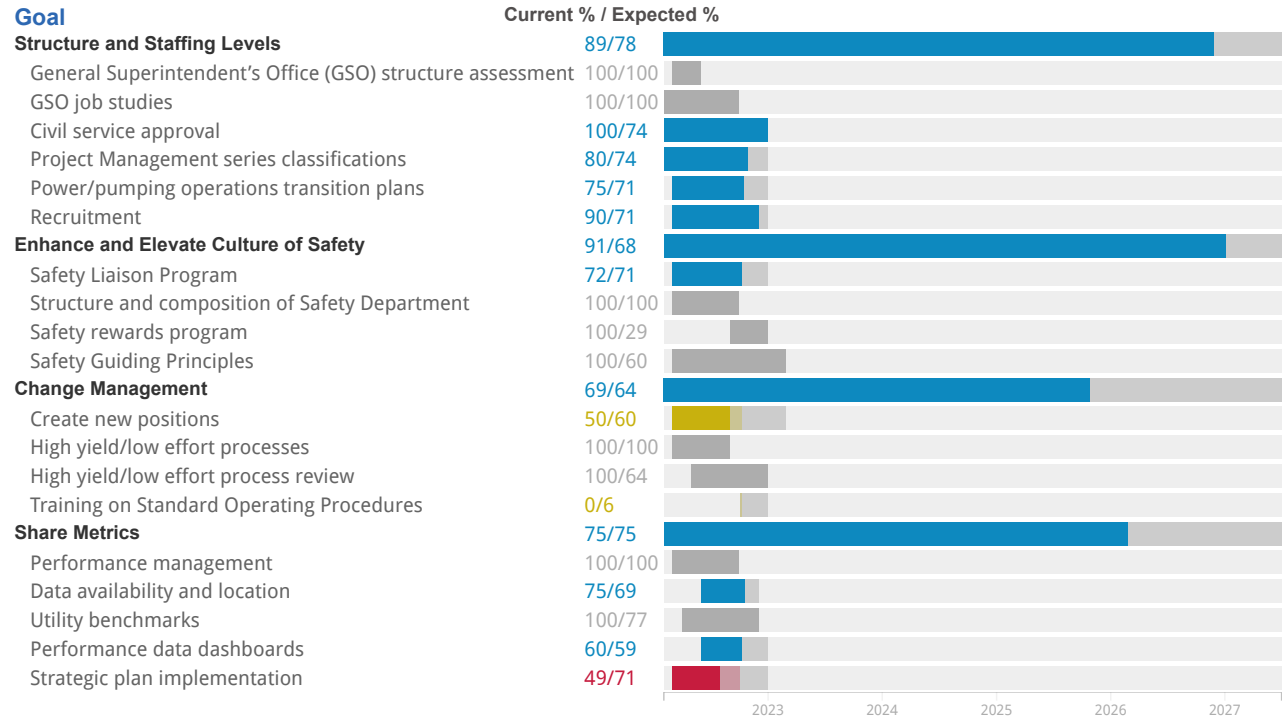
Overall Focus Area Progress: 81%

What Goals and Tactics Impact the Focus Area?

Goal	Current % / Expected %
Structure and Staffing Levels	89/78
General Superintendent's Office (GSO) structure assessment	100/100
GSO job studies	100/100
Civil service approval	100/74
Project Management series classifications	80/74
Power/pumping operations transition plans	75/71
Recruitment	90/71
Enhance and Elevate Culture of Safety	91/68
Safety Liaison Program	72/71
Structure and composition of Safety Department	100/100
Safety rewards program	100/29
Safety Guiding Principles	100/60
Change Management	69/64
Create new positions	50/60
High yield/low effort processes	100/100
High yield/low effort process review	100/64
Training on Standard Operating Procedures	0/6
Share Metrics	75/75
Performance management	100/100
Data availability and location	75/69
Utility benchmarks	100/77
Performance data dashboards	60/59
Strategic plan implementation	49/71

2023   2024   2025   2026   2027

How is Performance of the Focus Area Measured?

Employee Sustained Injuries (ESIs)	Injuries Leading to Absence	O&M Cost per Water Account ($)	O&M Cost per WW Account ($)	Completed Process Improvement Projects
5.0	**2.0**	**79**	**81**	**2**
Target: 0.0	Target: 0.0	Target: 0	Target: 0	Target: 3

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Organizational and Operational Improvement
Goal and Tactic Details

Goal 1: Structure and Staffing Levels

Evaluate and modify organizational structure and staffing levels.

Goal Progress:
89%

Goal Lead:
Kaitlin Tymrak

Tactics:

General Superintendent's Office (GSO) structure assessment
Tactic Owner: Kaitlin Tymrak | **Progress:** 100% | **End Date:** 05-31-2022
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:** 09-30-2022
Complete job studies for Deputy General Superintendents and USSA/SEDM/USA/EDM level for GSO.

Progress Notes:

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:** 12-31-2022
Obtain approval from civil service for Deputy General Superintendents and USSA/USA/SEDM/EDM levels.

Progress Notes:
8.4: Complete for 2022, will add additional positions in 2023 Workplan.

Project Management series classifications
Tactic Owner: Rebecca Johnsey | **Progress:** 80% | **End Date:** 12-31-2022
Develop Project Management series classifications and propose to Civil Service.

Progress Notes:
Progress updated from 60% to 80%

9.30 Update: Presenting series to CS commission on 10/17. Will update on approval at next Quarterly meeting.

Organizational and Operational Improvement
Goal and Tactic Details

Goal 1: Structure and Staffing Levels (cont.)

Evaluate and modify organizational structure and staffing levels.

Goal Progress:
89%

Goal Lead:
Kaitlin Tymrak

Tactics:

Power/pumping operations transition plans
Tactic Owner: Kaitlin Tymrak | **Progress:** 75% | **End Date:** 12-31-2022
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 35% to 75%
9.30 Update: Framework on track for completion, will memorialize by EOY.

Power/pumping operations transition plans
Tactic Owner: Kaitlin Tymrak | **Progress:** 75% | **End Date:** 12-31-2022
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 35% to 75%
9.30 Update: Framework on track for completion, will memorialize by EOY.

Organizational and Operational Improvement
Goal and Tactic Details

Goal 2: Enhance and Elevate Culture of Safety

Advocate and implement a safety culture throughout SWBNO.

Goal Progress:
91%

Goal Lead:
Chad Fava

Tactics:

Safety Liaison Program
Tactic Owner: Chad Fava | **Progress:** 72% | **End Date:** 12-31-2022
Review the existing 'Safety Liaison Program' for effectiveness and impact and recommend modifications.

Progress Notes:
Progress updated from 85% to 72%
9.30 Update: Half positions filled. Continuous recruitment for program. Will develop list of recommendations by EOY.

Structure and composition of Safety Department
Tactic Owner: Chad Fava | **Progress:** 100% | **End Date:** 09-30-2022
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:
9:30 Update: Departmental changes identified and documented. Job Studies underway and changes to be implemented under 2023 workplan.

Safety rewards program
Tactic Owner: Chad Fava | **Progress:** 100% | **End Date:** 12-31-2022
Develop a proposal to establish a safety rewards program.

Progress Notes:
9.30: Proposal complete. Will implement in 2023 workplan when new positions are created.

Safety Guiding Principles
Tactic Owner: Chad Fava | **Progress:** 100% | **End Date:** 02-28-2023
Develop a set of Safety Guiding Principles for the organization and present them to leadership for buy-in and widespread communication

Progress Notes:
6.21 update: Complete; Safety Manual has been updated regarding all safety principles.

Organizational and Operational Improvement
Goal and Tactic Details

Goal 3: Change Management

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

Goal Progress:
69%

Goal Lead:
Jackie Spencer

Tactics:

Create new positions
Tactic Owner: Tyler Antrup | **Progress:** 50% | **End Date:** 03-01-2023
Create a Continuous Improvement Officer (CIO) position and a business analyst position to support data gathering, monitoring, and reporting.

Progress Notes:
Progress updated from 25% to 50%
9.30 Update: Requesting position in 2023 budget. Job study draft complete.

High yield/low effort processes
Tactic Owner: Jackie Spencer | **Progress:** 100% | **End Date:** 09-01-2022
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:** 100% | **End Date:** 12-31-2022
Identify small teams to review and improve the selected high yield/low effort processes.

Progress Notes:
9.30 Update: 2022 process improvements complete, will look to do 3 processes in 2023.

Training on Standard Operating Procedures
Tactic Owner: Jackie Spencer | **Progress:** 0% | **End Date:** 12-31-2022
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

Goal 4: Share Metrics

Develop and share organizational performance metrics internally and externally.

Goal Progress:
75%

Goal Lead:
Tyler Antrup

Tactics:

Performance management
Tactic Owner: Tyler Antrup | **Progress:** 100% | **End Date:** 09-30-2022
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:
9.30 Update: Metrics list finalized, continuing to identify sources and gather data.

Data availability and location
Tactic Owner: Tyler Antrup | **Progress:** 75% | **End Date:** 11-30-2022
Based on responses from the Leadership Team, inventory existing data availability and data location.

Progress Notes:
Progress updated from 36% to 75%
9.30 Update: Most metrics data identified and being collected, continuing to identify further sources and collect data.

Utility benchmarks
Tactic Owner: Tyler Antrup | **Progress:** 100% | **End Date:** 11-30-2022
Identify specific measures to benchmark against the industry and peer utilities.

Progress Notes:
9.30 Update: Complete; benchmarks incorporated into final metrics.

Performance data dashboards
Tactic Owner: Tyler Antrup | **Progress:** 60% | **End Date:** 12-31-2022
Identify targets for performance data shared via dashboards.

Progress Notes:
Progress updated from 30% to 60%
9.30 Update: Working with Board and LT to identify targets for key metrics.
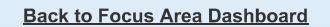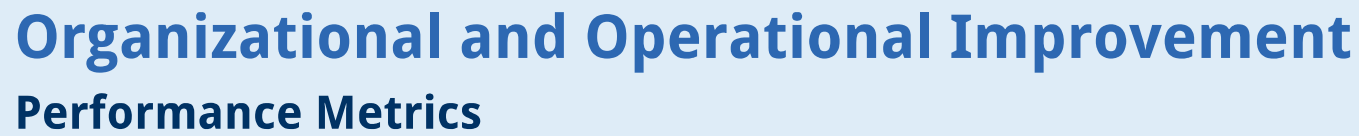
Strategic plan implementation
Tactic Owner: Tyler Antrup | **Progress:** 49% | **End Date:** 12-31-2022
Track the strategic plan implementation process.

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

Targeted Result: **Fewer workplace injuries and illnesses**

Employee Sustained Injuries (ESIs) current value: 5.0

Targeted Result: **Fewer injury-related absences**

Injuries Leading to Absence current value: 2.0

Targeted Result: **More operational processes improved**
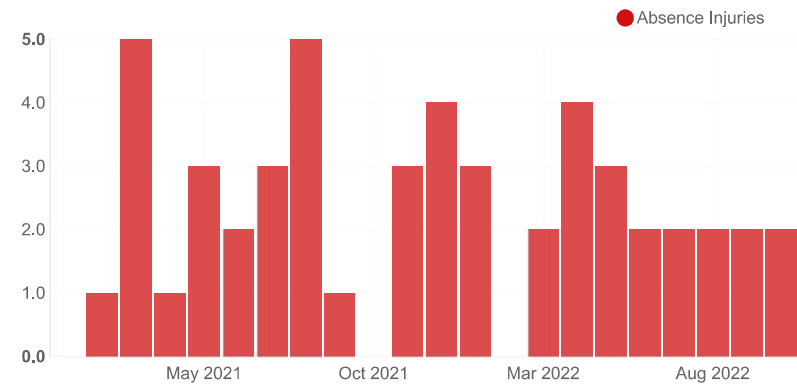
Completed Process Improvement Projects current value: 2
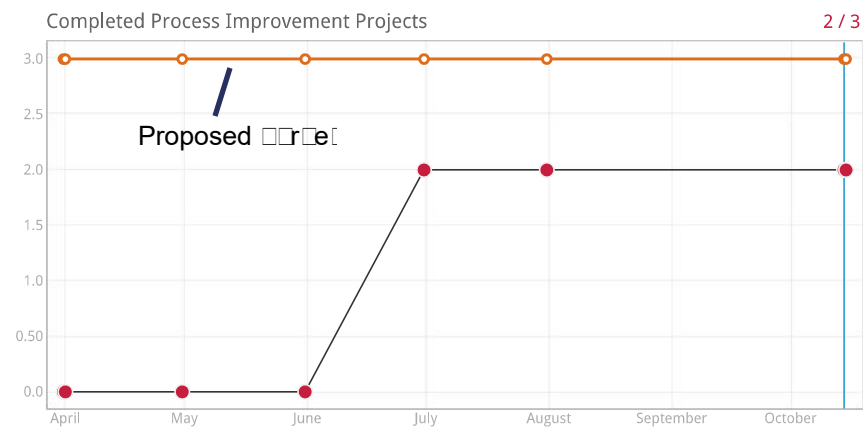
44

Organizational and Operational Improvement
Performance Metrics

Targeted Result: Lower cost of water service

O&M Cost per Water Account ($) current value: $79
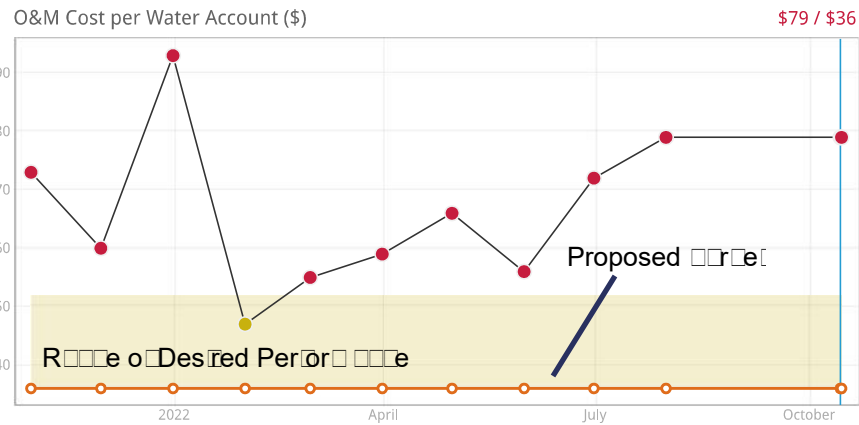
Targeted Result: Lower cost of wastewater service

O&M Cost per WW Account ($) current value: $81