Location: Executive Boardroom

Date: Wednesday, January 18, 2023

Time: 10:30 am

- Janet Howard
- Tamika Duplessis
- Nichelle Taylor
- Maurice Sholas
- Joseph Peychaud

Operations Committee Meeting Agenda

I. Roll Call

II. Discussion Item

a) 2023 SWBNO Holiday Calendar and Flexible Holiday Rule – Admiral Dave Callahan, CAO

III. Presentation Item

a) 2022 Strategic Plan Goals Update/2023 Goals Presentation – Tyler Antrup, Director of Strategic Planning

IV. Public Comment

V. Adjournment

R-020-2023

HOLIDAY CALENDAR - 2023

BE IT RESOLVED by the Sewerage and Water Board of New Orleans that the Sewerage and Water Board does hereby adopt the Holiday calendar for the year 2023, as set forth below:

New Year's 2023: Monday, January 2, 2023, Family holiday
MLK Day: Monday January 16, 2023, Normal holiday
Mardi Gras: Tuesday, February 21, 2023, Family holiday
Good Friday: Friday April 7, 2023, Normal holiday
Memorial Day: Monday, May 29, 2023, Normal holiday
Juneteenth Day: (displaced) Monday June 19, 2023, Normal holiday
Independence Day: Tuesday July 4, 2023, Family holiday
Labor Day: Monday, September 4, 2023, Family holiday
Indigenous Peoples Day, Monday October 9, 2023, Normal holiday
Thanksgiving Day: Thursday, November 23, 2023, Family holiday
Veterans Day (displaced) Friday November 24, 2023, Normal holiday
Christmas Eve (displaced) Friday December 22, 2023, Normal holiday
Christmas Day: Monday, December 25, 2023, Family holiday
New Year's Eve (displaced): Friday December 29, 2023, Normal holiday **

** Note: should Civil Service Commission approve pending rule change, this holiday may be used as a flex holiday per CS rule.

I, Ghassan Korban, Executive Director of the Sewerage and Water Board of New Orleans, do hereby certify that the above and foregoing is a true and correct copy of a resolution adopted at the Regular Monthly Meeting of said Board duly called and held, according to law, on January 25, 2023.

_____

GHASSAN KORBAN
EXECUTIVE DIRECTOR
SEWERAGE AND WATER BOARD

DRAFT

Rule IV Section 13. HOLIDAY PAY

13.1 There shall be a total of ten paid holidays, as established in Rule X, Section 1.2, for all employees except those who are compensated on a special hourly basis. Employee**s** shall be paid for Holidays in accordance with Council Motion.

13.2 Employees on leave without pay before or after the **h**~~H~~oliday are not eligible for **h**~~H~~oliday Pay.

13.3 Part-time hourly employees receive holiday pay pro-rated based on their average daily work schedule. Part time employees shall not be eligible for **h**~~H~~oliday Pay if their work s~~S~~chedule is ~~either~~ intermittent or **the** employee is assigned less than 17 hours per week.

13.4 For non-exempt employees who work on an official city holiday, the appointing authority ~~should~~ **shall** adjust the employee's work schedule to allow another day off during that work period as a substitution for the holiday. If such a substitution is not possible, then ~~for working on the holiday~~ the employee shall be paid double time **for working on the holiday**. Under no circumstances, **except as enumerated in section 13.6 of this Rule**, shall an employee receive pay less than an amount equal to straight time for all hours worked plus holiday pay as established in Rule X, Section 1.2.

However, on New Year's Day, Mardi Gras, Independence Day, Labor Day, Thanksgiving Day, Christmas Day or on their days of observance as officially designated by the City Council, employees who are required to work shall be paid double time and one-half. Under no circumstances shall an employee receive less than an amount equal to time and one-half for hours worked, plus holiday pay as established in Rule X, Section 1.2

13.5 For exempt employees, when a holiday falls on a regularly scheduled day off or who work an official city holiday, the appointing authority must provide that employee a substitute day off within thirty days of the holiday, **except as enumerated in section 13.6 of this rule**. In no circumstances may holiday pay be used to supplement the normal weekly salary.

13.6 Flexible Holidays. An appointing authority with written notice to the Director may designate one Council approved holiday per year as a flexible holiday. Flexible holidays shall not include New Year's Day, Mardi Gras, Independence Day, Labor Day, Thanksgiving Day, or Christmas Day or their day of observance as officially designated by the City Council.

When an employee who is entitled to a flexible holiday makes a written request for flexible holiday leave, the appointing authority shall, within five (5) days after the date of the employee's request, either approve or disapprove the request in writing. If the request is denied, the appointing authority shall grant, in writing, permission for use of the flexible holiday leave during an equivalent period within the 30-day period following the employee's request.

Flexible holidays must be used within the same calendar year as the official holiday as designated by Council Motion. Unused flexible holidays do not have any monetary value and shall not roll over to the next calendar year.

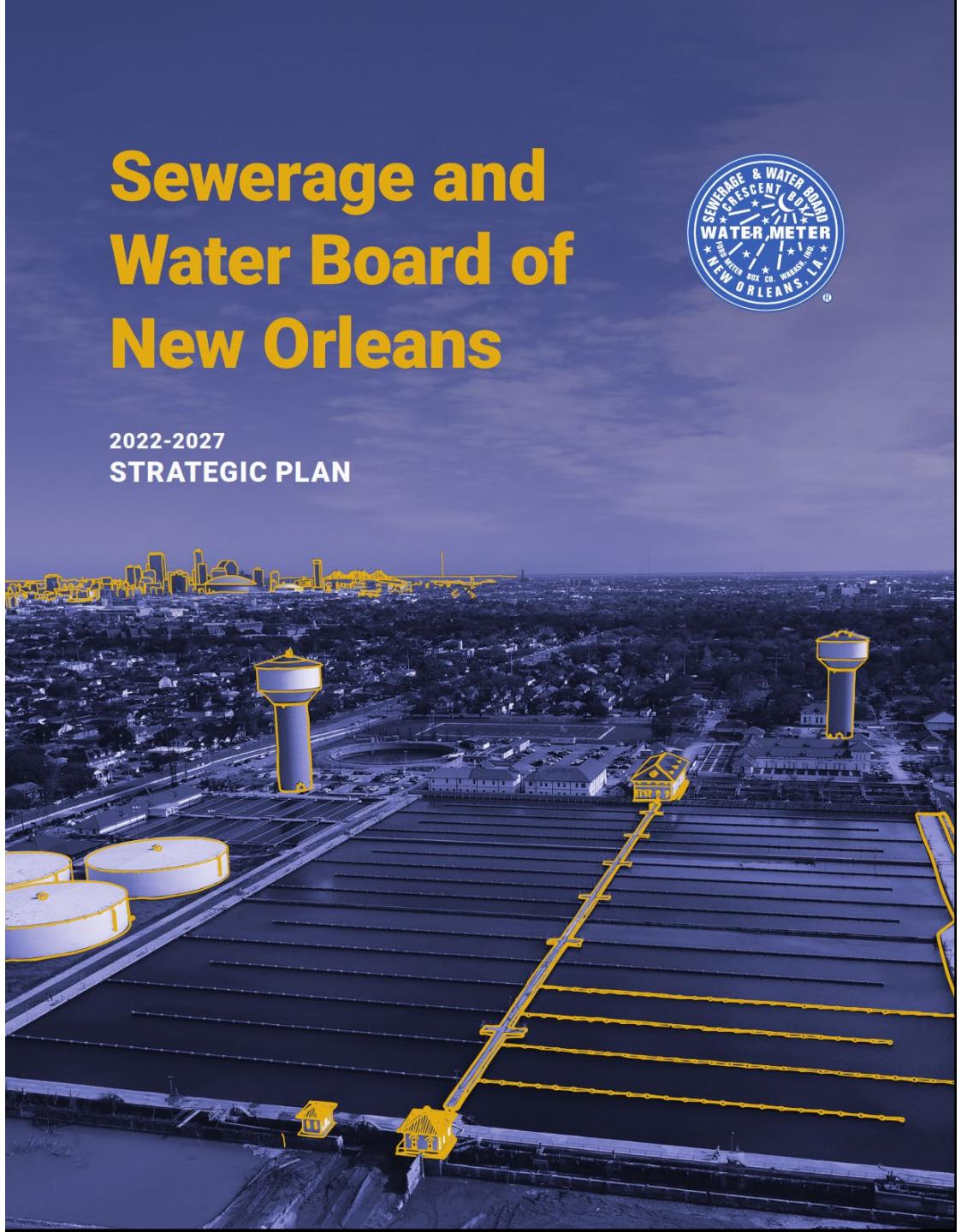
Flexible holidays shall not be used immediately before or after other Council designated holidays.

Non-exempt employees who work on the Council designated day of observance of the flexible holiday shall not be eligible for additional payment under section 13.4 of this Rule.

Rule IV

9.5 If it becomes necessary for a non-exempt employee to work on an official city holiday as designated by the City Council, the appointing authority should adjust the employee's work schedule to allow another day off during that work period as a substitution for the holiday. If such a substitution is not possible, then for working on the holiday the employee shall be paid double time. Under no circumstances shall an employee receive pay less than an amount equal to straight time for all hours worked plus holiday pay as established in Rule X, section 1.2. However, on New Year's Day, Mardi Gras, Independence Day, Labor Day, Thanksgiving Day, Christmas Day or on their days of observance as officially designated by the City Council, employees who are required to work shall be paid double time and one-half. Under no circumstances shall an employee receive less than an amount equal to time and one-half for all hours worked, plus holiday pay ~~as established in Rule X, Section 1.2~~ **except as provided for under Rule IV section 13.6.** (amended October 23, 1985, ratified by the Council October 24, 1985, effective April 13, 1986

Strategic Plan Implementation



STRATEGIC 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.

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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.

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Safety Minded
Transparent and Honest

FOCUS AREAS	GOALS	RESULTS
Financial Stability Practice strong fiscal stewardship and ensure timely revenue recovery while balancing affordability with investments necessary to deliver critical services	1. Optimize capital and operational spending 2. Enhance budget development and management processes 3. Improve timely revenue realization/recovery and leverage new and alternate revenue sources 4. Enhance affordability programs to better meet community needs	+ Fewer capital project change orders + Lowered aged accounts receivable + Reduction in unbilled (non-revenue) water + Increased utilization of assistance programs
Technology Modernization Modernize technology and system integration to improve reliability and efficiency of operations and enhance customer service	5. Identify and update critical/core technology software solutions and resources 6. Enhance cybersecurity and technology systems resiliency 7. Improve adoption and integration of current and new technology systems	+ Increased customer self-service utilization + Increased customer service efficiency + Fewer billing errors + Increased employee adoption of core technology systems
Workforce Development and Enrichment Support and develop a high-performing team that is skilled, committed, inspired, rewarded, engaged, and accountable	8. Evaluate workforce model options, including Civil Service and others, and determine an appropriate approach for SWBNO 9. Enhance resources for employee training and development 10. Motivate and train supervisors and leaders to improve employee and team performance 11. Strengthen internal communication and information sharing to increase collaboration across departments 12. Improve knowledge capture, transfer, and succession planning	+ Increased workforce productivity + Reduction in open positions + Increased and improved employee training + Increased employee morale
Customer Service Excellence and Stakeholder Engagement Continuously meet and exceed the service needs of our customers and proactively communicate and engage stakeholders	13. Foster a culture of customer service throughout the organization 14. Expand convenience systems and capabilities to improve self-service options for customers 15. Elevate core customer service delivery performance 16. Advance proactive communication and outreach programs	+ Reduction in customer complaints + Increased customer service first call resolution + Increased customer satisfaction rating + Increased social media interactions + Improved positive media sentiment
Infrastructure Resiliency and Reliability Improve efficiency and resiliency of current and future infrastructure by leveraging partnerships and innovative approaches to funding and sustainable design	17. Shift maintenance planning and workflows from reactive to preventative through comprehensive asset management 18. Replace and renew aged infrastructure using integrated approaches 19. Successfully deliver all critical capital improvement projects by improving collaboration with project partners 20. Develop long-range system master plans to renew infrastructure incorporating community vision, green infrastructure, and climate adaptation	+ Increased time spent on preventative maintenance + Increased feet of pipeline replacement + Fewer water main breaks + Fewer sewer overflows + Increased number of green infrastructure projects
Organizational and Operational Improvement Optimize organizational structure, alignment, and capacity to ensure safe operations and efficient service delivery	21. Evaluate and modify organizational structure and staffing levels 22. Enhance and elevate safety of culture 23. Implement programs and training related to change management, process standardization, and continuous improvement 24. Develop and share organizational performance metrics internally and externally	+ Improved service delivery + Fewer workforce accidents and injuries + Increased number of specific operational process improvement projects

Financial Stability

2022 Tactics Completed

- **Review and update Purchasing Policies**
- **Budget approval prior to purchases**
- Develop, update, and regularly share policies regarding capital spending
- Analyze monthly budget reports, increase transparency, and implement effective budgeting practices
- **Incorporate affordability outcomes in Financial Plan Development**

2022 Tactics Continued

- **Inventory and analyze significant spending across commodities and prioritize relationships with vendors that have the most advantageous terms**
- Check in quarterly and forecast capital funding sources and usage to increase spending transparency
- **Designate and expand the role and staffing of the Project Delivery Unit (PDU) to look more broadly for grants**

New Tactics for 2023

- **Leverage new financial software to promote transparency**
- Create capital/operating spending training curriculum
- Develop best practices document from peer organizations on budget control
- **Evaluate legislative means/opportunities to impose liens on property owners with delinquent utility bills**

Financial Stability
Dashboard

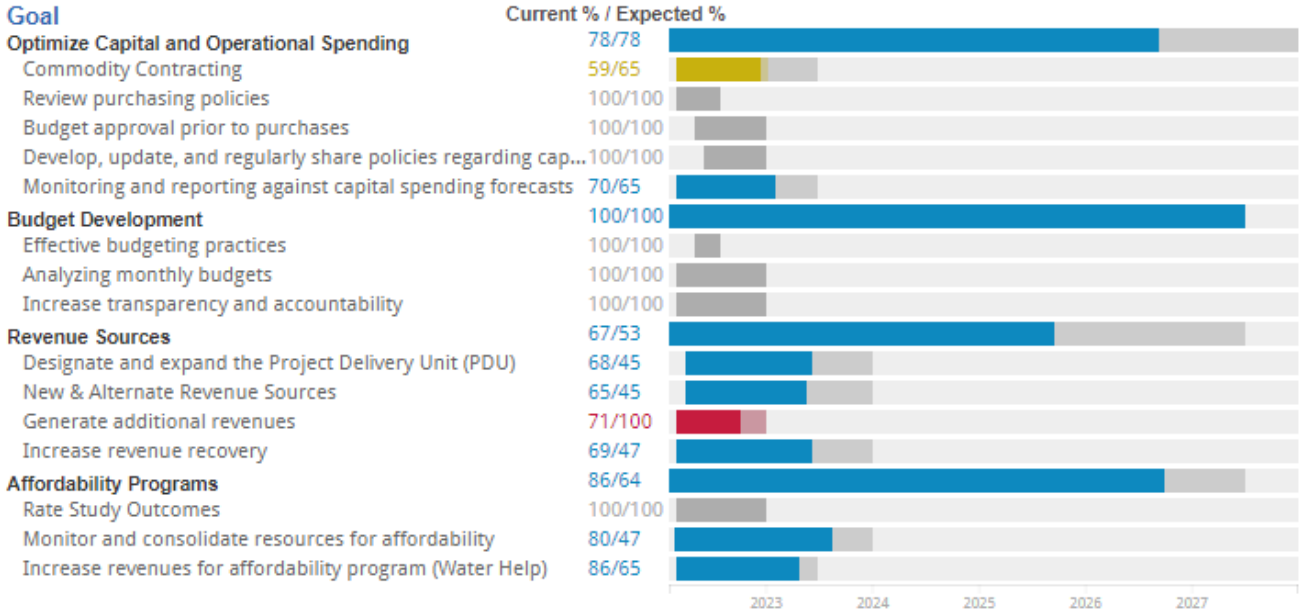
What Does Success Look Like for the Focus Area?

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

Overall Focus Area Progress: 82%

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?

Customer Delinquency Rate	Aged Accounts ($)	Assistance Programming	Unaccounted for Water	Days Cash on Hand - Water	Days Cash on Hand - Sewer	YTD Capital Spend	CIP Change Orders
18.00%	$57,203,154	0.14%	80.7%	204	225	$142,041,535	$0
Target: 5.00%	Target:	Target: 3.00%	Target: 45.0%	Target: 90	Target: 90	Target: $382,627,666	Target: $0

Technology Modernization

2022 Tactics Completed

- **Inventory of current software and systems**
- **Documented cybersecurity policies and deployed training resources**
- Deployed new software systems that support cybersecurity
- Expanded new employee orientation module on cybersecurity

2022 Tactics Continued

- **Produce a formal recommendation that addresses SWBNO's current document management needs**
- **Increase the use of video technology for operational/safety/security use**
- **Complete firewall installation**
- As a component of the training program, complete an assessment of the technology-related skills needed by job position or department

New Tactics for 2023

- Develop a communications approach that celebrates the modernization of major technology system upgrades
- **Implement new customer portal**
- **Perform an evaluation of the payroll and HR processes associated with employee timesheets**
- Develop and implement cybersecurity incident playbooks
- Undertake an assessment of intranet content and convene a group of internal stakeholders to develop processes and norms regarding use and content

Technology Modernization
Dashboard

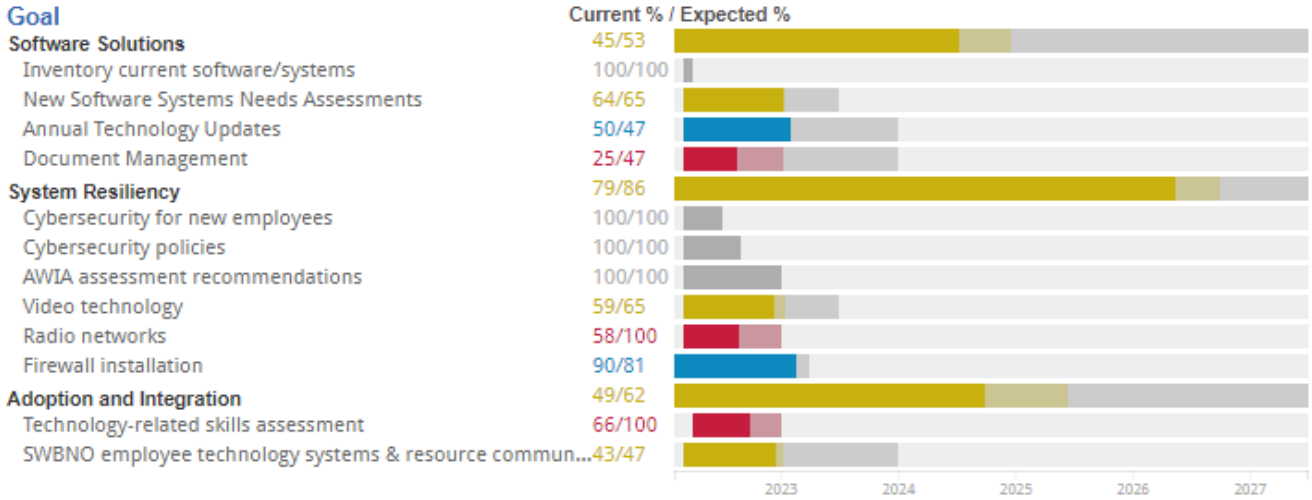
What Does Success Look Like for the Focus Area?

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

Overall Focus Area Progress: 58%

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?

IT Training Attendance	Phishing Test Failure Rate	Help Desk Phone Calls	E-Bills	Billing Errors (errors/10,000 billings)
182	4.1%	93	32.0%	0.0%
Target: 0	Target: 0.0%	Target: 0	Target: 0.0%	Target: 8.8%

Workforce Development and Enrichment

2022 Tactics Completed

- **Completed framework for workforce model stakeholder engagement process**
- **Began market study to update Uniform Pay Plan**
- Implemented new employee onboarding program
- Inventoried internal communications channels and developed an internal communications strategy
- **Relaunched the Pipeliner employee newsletter**
- Restarted exit interviews

2022 Tactics Continued

- **Engage with an external consultant to identify workforce issues and opportunities**
- Maintain a complete staff directory for intranet and emergency call trees
- 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

New Tactics for 2023

- Develop training curriculum for internal communications (email, SharePoint, etc.) and deploy tools, techniques, workflows, and methods for staff
- Document current performance management approach and develop enhanced program to be implemented in 2023
- Department-level leadership development/supervisory training needs assessments
- Begin developing training curriculum and deploying supervisory and leadership development training in May 2023
- Establish standard workflow and drive use of shared folders to enhance organizational collaboration
- Develop succession planning roadmap

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: 60%

What Goals and Tactics Impact the Focus Area?

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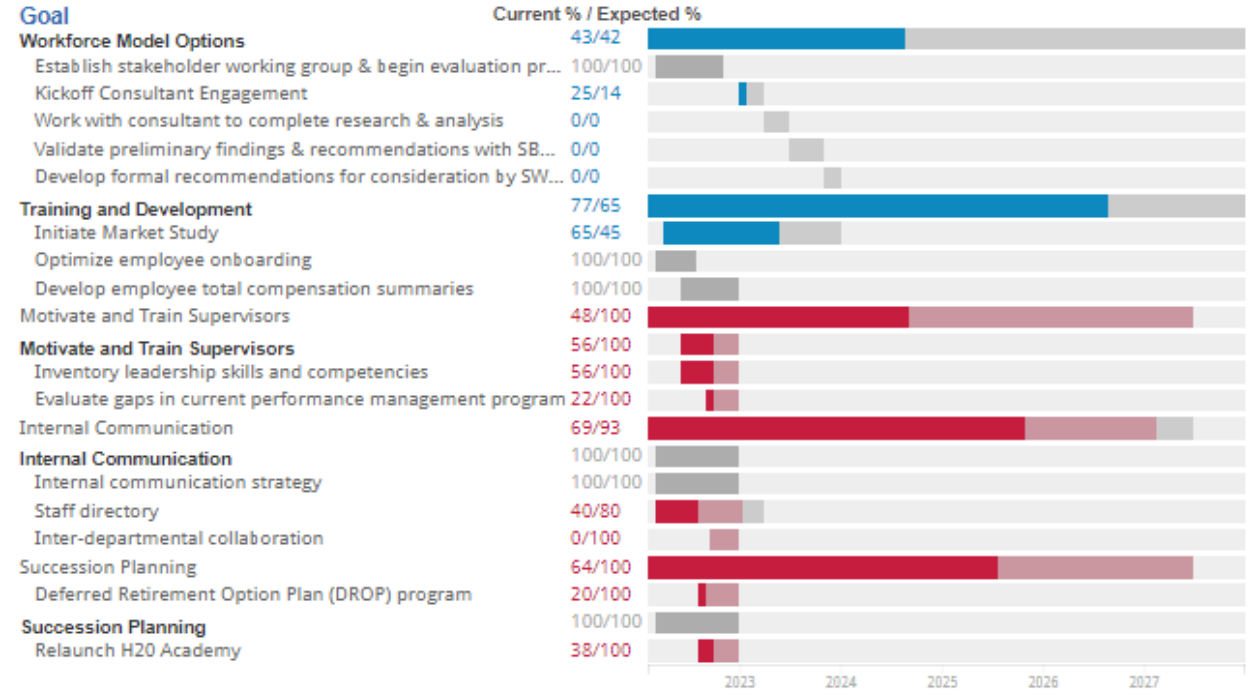

How is Performance of the Focus Area Measured?

Accounts per FTE	MGD per FTE (W)	MGD per FTE (WW)	Open Positions (# of Positions)	Voluntary Turnover (# of Staff)	Training Hours
114.4	0.13	0.10	404	2	1,808
Target: 0.0	Target: 0.00	Target: 0.00	Target: 88	Target: 9	Target: 0

Customer Service Excellence and Stakeholder Engagement

2022 Tactics Completed

- Inventoried existing training and technology used to support CS staff
- Launched a CS continuous improvement program
- Conducted a skills and competencies gap analysis across customer service
- Initiated a CS on-boarding program for new employees
- Increased options for customer self-service and payment locations
- Revamped meter reading strategy and provided additional resources to support meter readers
- Reviewed customer dispute process and participated in development of new policies
- Developed a utility Communications Plan to advance proactive communication with customers and stakeholders

2022 Tactics Continued

- **Identify and deploy high-impact training and tools that can help bridge the gap, including refresher training**
- **Implement Verint support for Customer Relationship** Management (CRM) software
- Inventory and explore increased multi-lingual resources (website, printed materials, etc.)
- Inventory, assess, and improve resources to help customers understand high and estimated bills

New Tactics for 2023

- Create internal training capacity to close identified knowledge and skill gaps
- Deploy a customer service survey - transactional and full customer base
- Review reduction in disputes and examine the dispute workflow with emphasis on customer communication and consistency of outcomes
- Elevate external communication efforts
- Expand media relations efforts

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: 92%

What Goals and Tactics Impact the Focus Area?

Back to Strategic Framework
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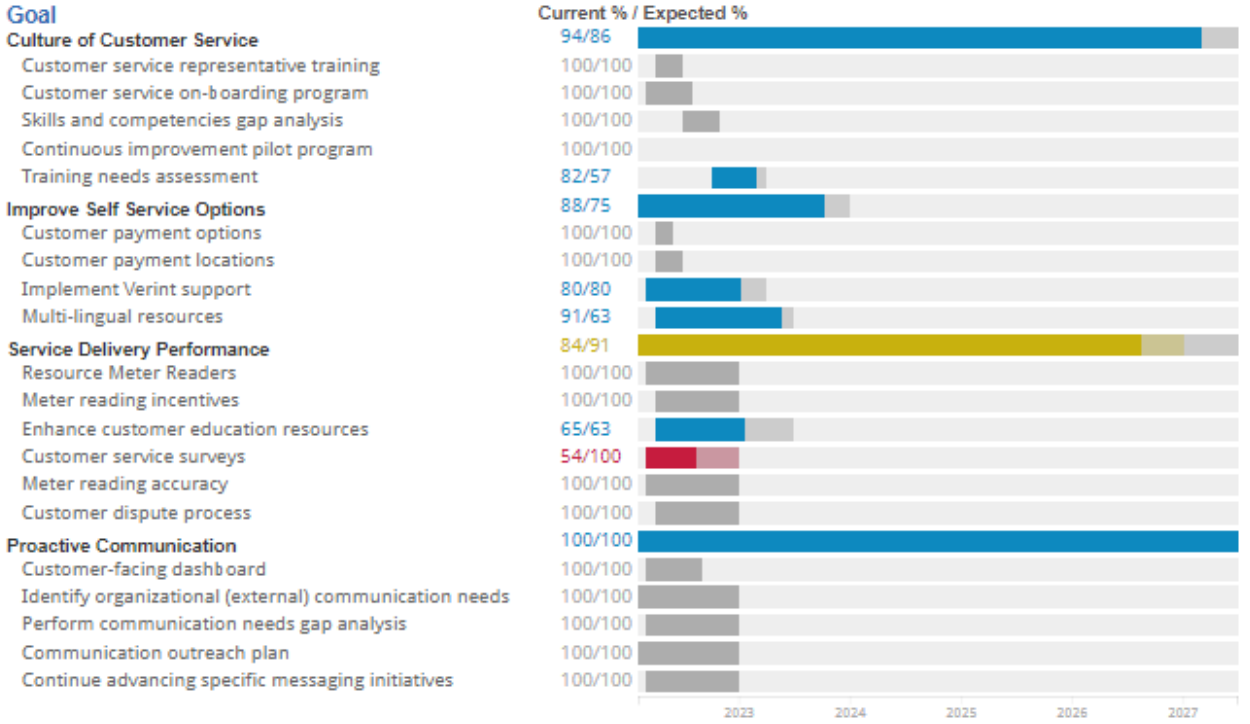

How is Performance of the Focus Area Measured?

Customer Disputes	Avg. Dispute Resolution (days)	Avg. Speed of Answer (min)	Meter Reads (% Actual vs. Estimated)	Social Media Followers	Engagement & Outreach Events
934	80	12	50.0%	16,781	3
Target: 0	Target: 45	Target: 1	Target: 90.0%	Target: 0	Target: 0

Infrastructure Resilience and Reliability

2022 Tactics Completed

- Completed preliminary assessment of Asset Management and Work Order Management system risks
- Established an Asset Management Working Group

2022 Tactics Continued

- **Develop a scope of work and select a vendor to serve as owner/agent to develop a procurement instrument for the new AM system.**
- Catalogue resource needs across water, wastewater, and stormwater drainage systems
- Develop an enhanced way to monitor and communicate capital delivery performance
- Conduct an assessment of the contract management process to improve consistency and streamline processes

New Tactics for 2023

- Initiate needs assessment for Asset Management system and develop RFP
- Circulate infrastructure needs memo/spreadsheet and solicit staff input
- Increase capacity for procurement and contracting
- Establish enhanced collaboration between SWBNO construction project managers and community outreach specialists
- Begin Water Treatment Plant master plan

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: 66%

What Goals and Tactics Impact the Focus Area?

Back to Strategic Framework
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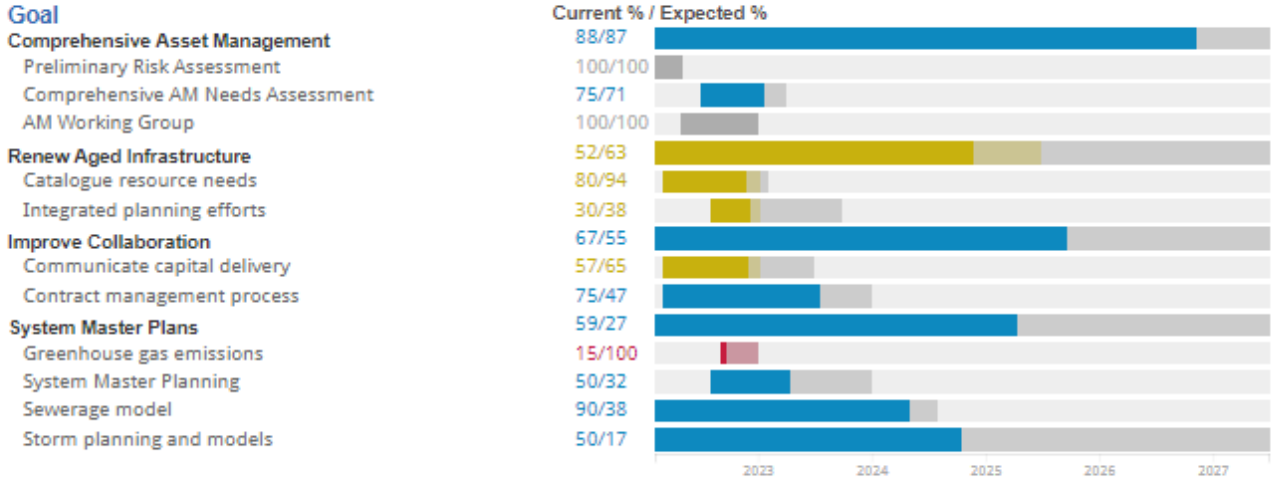

How is Performance of the Focus Area Measured?

Pipe Renewal & Replacement (%)	Sewer Manholes Inspected (%)	Sewer Lines Cleaned (%)	Water Hydrants + Valves Maintained (%)	Sanitary Sewer Overflows
0.0%	0.00%	14.63%	28.7%	28
Target: 0.0%	Target: 0.00%	Target: 14.28%	Target: 0.0%	Target: 0

Organizational and Operational Improvement

2022 Tactics Completed

- Developed and implemented new management structure for General Superintendent's Office
- Developed and received approval of new Project Management Series within Civil Service
- Developed a framework for transition planning in the pumping and power groups
- Initiated targeted recruitment for key positions
- Restructured Safety Department
- Developed a Safety Rewards Program and Safety Guiding Principles
- Completed 5 high yield/low effort process improvement projects
- Developed dashboard for tracking progress on strategic focus areas

2022 Tactics Continued

- **Review the existing 'Safety Liaison Program' for effectiveness and impact and recommend modifications**
- Fund and fill the Continuous Improvement Officer (CIO) position and a Project Manager position to support data gathering, monitoring, and reporting
- **Track the strategic plan implementation process**

New Tactics for 2023

- Implement West Power Complex staff transition plan
- Develop and implement smart metering staffing structure
- Enhance recruitment for engineers and project managers
- Establish an operational technology group (i.e., control systems, radios, etc.)
- Recruit for an effectively on-board a new Continuous Improvement Officer to ensure quick impact/success
- Leverage SharePoint to operationalize metric data collection

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: 80%

What Goals and Tactics Impact the Focus Area?

Back to Strategic Framework
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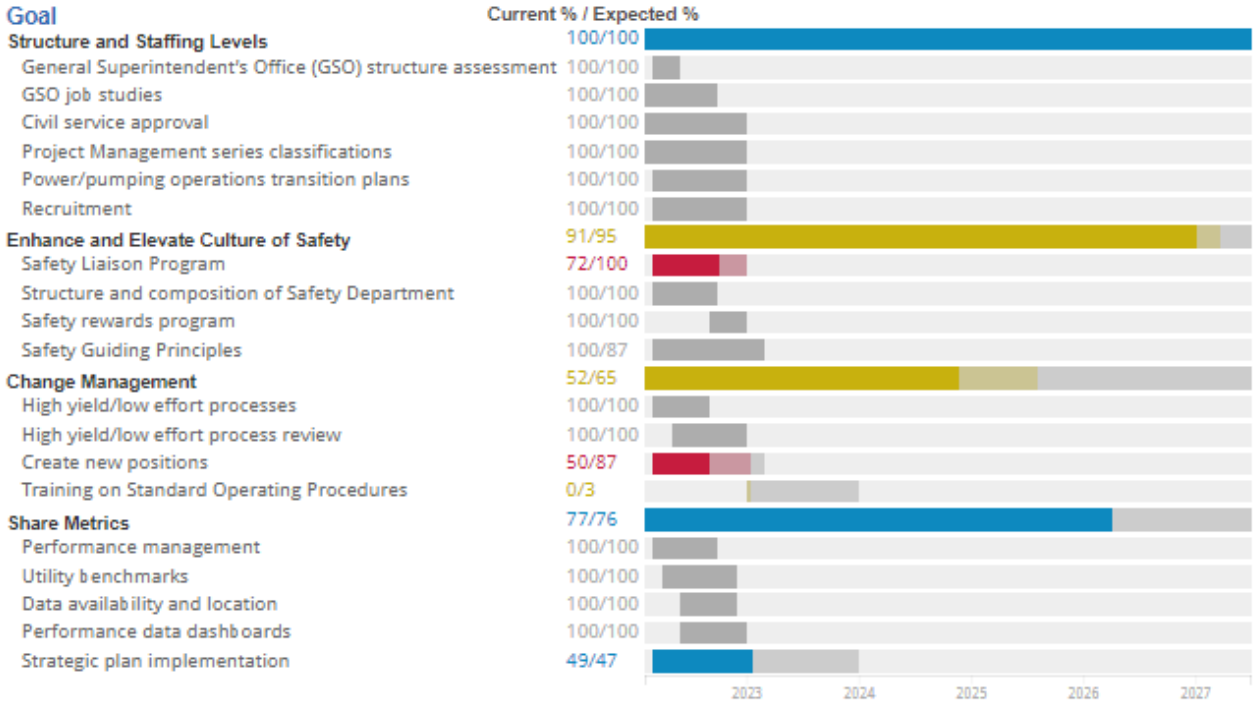

How is Performance of the Focus Area Measured?

Employee Sustained Injuries (ESIs)	Injuries Leading to Absence	O&M Cost per Water Account ($)	O&M Cost per WW Account ($)	Completed Process Improvement Projects
9.0	2.0	75	79	2
Target: 0.0	Target: 5.00	Target: 36	Target: 33	Target: 3

Sewerage and Water Board of New Orleans

Strategic Plan Framework

Back to Cover Page

Vision

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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	78/78
Budget Development & Management	100/100
Revenue Sources & Recovery	67/53
Affordability Programs	86/64

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 Updating	45/53
Technology Systems Resiliency & Security	79/86
Adoption and Integration of Technology Systems	49/62

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	43/42
Training and Development	77/65
Motivate and Train Supervisors	48/100
Internal Communication	69/93
Succession Planning	64/100

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

Culture of Customer Service	94/86
Improve Self-Service Options	88/75
Service Delivery Performance	84/91
Proactive Communication	100/100

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	88/87
Renew Aged Infrastructure	52/63
Improve Collaboration	67/55
System Master Plans	59/27

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	100/100
Enhance and Elevate Culture of Safety	91/95
Change Management	52/65
Share Metrics	77/76

Focus Area Champion: Kaitlin Tymrak, Business Services Lead

Results

18 Customer Delinquency Rate	57,203,154 Aged Accounts ($)	0.14 Assistance Program Utilization (%)
80.7 Unaccounted for Water	204 Days Cash on Hand - Water	142,041,535 YTD Capital Spend
246,587 CIP Change Orders		

182 IT Training Attendance	4.1 Phishing Test Failure Rate	93 Help Desk Phone Calls
32 E-Bills	0 Billing Errors (errors/10,000 billings)	

114.4 Accounts per FTE	0.13 MGD per FTE (W)	0.1 MGD per FTE (WW)
2 Voluntary Turnover (# of Staff)	404 Open Positions (# of Positions)	1,808 Training Hours

934 Customer Disputes	50 Meter Reads (% Actual vs. Estimated)	80 Avg. Dispute Resolution (days)
12 Avg. Speed of Answer (min)	16,781 Social Media Followers	3 Engagement & Outreach Events

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

2 Injuries Leading to Absence	9 Employee Sustained Injuries (ESIs)	2 Completed Process Improvement Projects
75 O&M Cost per Water Account ($)	79 O&M Cost per WW Account ($)	

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

SWBNewOrleans

(504) 52-WATER

Tyler Antrup

Director of Strategy + Planning

tantrup@swbno.org

2023 Strategic Plan Implementation Workplan

DRAFT

January 13, 2022

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Workforce Development and Enrichment

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Infrastructure Resiliency and Reliability

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Organizational and Operational Improvement

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

STRATEGIES	RESULTS
1. Optimize capital and operational spending 2. Enhance budget development and management processes 3. Improve timely revenue recovery and leverage new and alternate revenue sources 4. Enhance affordability programs to better meet community needs	+ Fewer capital project change orders + Lowered accounts receivable + Reduction in unbilled (non-revenue) water + Increased utilization of assistance programs
5. Identify and update critical/core technology software solutions and resources 6. Enhance cybersecurity and technology systems resiliency 7. Improve adoption and integration of current and new technology systems	+ Increased customer self-service utilization + Increased customer service efficiency + Fewer billing errors + Increased employee adoption of core technology systems
8. Evaluate workforce model options, including Civil Service and others, and determine an appropriate approach for SWBNO 9. Enhance resources for employee training and development 10. Motivate and train supervisors and leaders to improve employee and team performance 11. Strengthen internal communication and information sharing to increase collaboration across departments 12. Improve knowledge capture, transfer, and succession planning	+ Increased workforce productivity + Reduction in open positions + Increased and improved employee training + Increased employee morale
13. Foster a culture of customer service throughout the organization 14. Expand convenience systems and capabilities to improve self-service options for customers 15. Elevate core customer service delivery performance 16. Advance proactive communication and outreach programs	+ Reduction in customer complaints + Increased customer service first call resolution + Increased customer satisfaction rating + Increased social media interactions + Improved positive media sentiment
17. Shift maintenance planning and workflows from reactive to preventative through comprehensive asset management 18. Replace and renew aged infrastructure using integrated approaches 19. Successfully deliver all critical capital improvement projects by improving collaboration with project partners 20. Respond to climate change through innovation and green infrastructure projects	+ Increased time spent on preventative maintenance + Increased feet of pipeline replacement + Fewer water main breaks + Fewer sewer overflows + Increased number of green infrastructure projects
21. Evaluate and modify organizational structure and staffing levels 22. Enhance and elevate safety of culture 23. Implement programs and training related to change management, process standardization, and continuous improvement 24. Develop and share organizational performance metrics internally and externally	+ Improved service delivery + Fewer workforce accidents and injuries + Increased number of specific operational process improvement projects

FOCUS AREA

Financial Stability

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

FOCUS AREA CHAMPION:

Grey Lewis

Chief Financial Officer

STRATEGY 1:

Optimize capital and operational spending

Strategy Lead: Cashanna Moses

Strategy Impacts: Being strategic with capital and operational spending through more comprehensive and consistent policies and procedures, more extensive financial control, and increased transparency, will maximize the impact of SWBNO's investments and lead to increased accountability and more efficient spending. Implementing this strategy will also protect the organization from risks like inefficient and inconsistent spending due to out-of-date policies, organizational confusion, and negative vendor relations.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Review and develop updated controls and policies to increase accountability for purchases made against corporate accounts.	Cashanna Moses	Mar-22	Jul-22	Purchasing policies have been updated
Completed Continue to monitor and minimize out-of-budget spending and implement stronger controls to ensure purchases conform to budget limitations.	Dexter Joseph	Apr-22	Dec-22	Pre-approval is now requires for any spending over $10,000
Completed Develop, update, and regularly share policies regarding capital spending.	Kevin Garrison	Jun-22	Dec-22	Updated policies and procedures are now in place
Underway Inventory and analyze significant spending across commodities and prioritize relationships with vendors that have the most advantageous terms for SWBNO.	TBD	Mar-22	Jun-23	Staffing shortages have impacted 2022 progress
Underway Check in quarterly and forecast capital funding sources and usage to increase spending transparency.	Kevin Garrison	Mar-23	Jun-22	2022 progress met expectations; completion depends on successful deployment of new financial system
New Leverage the new financial software to promote greater transparency.	TBD	TBD	TBD	
New Create a capital and operational spending workshop/training curriculum.	TBD	TBD	TBD	
New Evaluate internal approaches to minimize deferred capital spending.	TBD	TBD	TBD	

STRATEGY 2:

Enhance budget development and management processes

Strategy Lead: Kevin Garrison

Strategy Impacts: Enhancing and standardizing the processes used to develop and manage the budget will lead to increased transparency, greater collaboration between the Finance Department and other departments at the organization, and more consistent implementation of financial controls. Implementation of this strategy will require an update to existing financial software to allow for the use of enhanced technology tools.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Identify peer organizations that have effective budgeting practices and develop recommendations for improvement.	Dexter Joseph	May-22	July-22	Developed contacts with and collected information from peer cities and GFOA
Completed Consistently work with departments to increase transparency and accountability in support of financial planning.	Kevin Garrison	Mar-22	Dec-22	Complete for 2022; will reinitiate in 2023 following deployment of new financial management system
Completed Analyze monthly budget reports and perform bi-annual reviews to identify variances and provide proactive feedback to departments.	Kevin Garrison	Mar-22	Dec-22	Significantly improved budget management practices throughout the organization
New Implement additional spending controls.	Kevin Garrison	TBD	TBD	
New Improve enterprise-wide budget awareness.	Kevin Garrison	TBD	TBD	
New Effective overall enforcement and accountability.	Kevin Garrison	TBD	TBD	
New Develop a document memorializing best practice findings from other organizations.	Dexter Joseph	TBD	TBD	

STRATEGY 3:

Improve timely revenue recovery and leverage new and alternate revenue sources

Strategy Lead: Monique Rainey, LaTressia Matthews

Strategy Impacts: Timely revenue recovery and the identification of diversified revenue sources will increase SWBNO's ability to generate revenue and will lead to better utilization of existing revenues and increased financial stability. The strategy will require significant organizational capacity to implement, as well as technological advancements to better implement and track revenue recovery strategies.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Underway Designate and expand the role and staffing of the Project Delivery Unit (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).	Monique Rainey	Mar-22	Dec-23	A new position to pursue grant funding has been budgeted for FY23
Underway Evaluate and update rules and regulations to increase revenue recovery (e.g., delinquency recovery, theft reduction, and institutions that have historically received free water).	Grey Lewis	Mar-22	Dec-23	Continuing to make progress reducing delinquent accounts through consistent collection efforts and amnesty program
Underway Use industry resources (American Water Works Association [AWWA], etc.) to identify and implement successful strategies from other utilities.	Grey Lewis	Apr-22	Dec-23	Assessing ways to maximize existing revenue streams and the feasibility of implementing a drainage fee
New Evaluate legislative means/opportunities to impose liens on property owners with delinquent utility bills.	Grey Lewis, Christy Harowski, Yolanda Grinstead	Jan-23	Dec-23	

STRATEGY 4:

Enhance affordability programs to better meet community needs

Strategy Lead: Tyler Antrup

Strategy Impacts: Expanded affordability programs will help low-income residents of SWBNO's service area better afford their bills, protecting community health and safety while helping ensure that water bills do not place an undue burden on residents. Affordability programs will still need to support revenue sufficiency.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Consistently work with departments to increase transparency and accountability in support of financial planning.	Tyler Antrup	Mar-22	Dec-22	Rate study has developed recommendations for customer affordability program
Underway Evaluate and investigate opportunities to increase revenues for affordability program (Water Help).	Nicole Kelly	Mar-22	June-23	IT and Customer Service support needed to increase visibility of Water Help
Underway Monitor and consolidate resources on external affordability programs (e.g., federal/state programs, renter programs, community action group funding).	Nicole Kelly	Mar-22	Dec-23	Significant progress being made; staff resources have been designated to formalize assistance programming and increase their application

FOCUS AREA

Technology Modernization

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

FOCUS AREA CHAMPION:

Dave Callahan

Chief Administrative Officer

STRATEGY 5:

Identify and update critical/core technology software solutions and resources

Strategy Lead: Melinda Nelson

Strategy Impacts: It is vital for high-functioning organizations to maintain technology tools that meet operational needs. Identification of critical technology resources will help SWBNO better understand its technology needs, and updates to these technology needs will help protect SWBNO from cybersecurity threats and allow it to function as effectively and efficiently as possible.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Inventory current software/systems and post list of major and minor software on intranet.	Melinda Nelson	Mar-22	Apr-22	Inventory is complete
Underway Complete a needs assessment for the Asset Management and new financial software systems.	Melinda Nelson	Mar-22	Jun-23	Needs assessments for both systems are underway and will be completed by Q2 2023
Underway Document, prioritize, and maintain the list of technology updates that are underway or may be considered.	Melinda Nelson	Mar-22	Dec-23	List of technology systems is regularly maintained; currently focused on implementing FY23 budgeted updates and systems
Underway Produce a formal recommendation that addresses SWBNO's current document management needs.	Yolanda Grinstead, Chanelle Collins	Mar-22	Dec-23	Continuing to work through process of hiring a Records Officer
New Fully deploy AdobeSign throughout the organization to enhance document processing.	Cathy Smith	Jan-23	Mar-23	
New Develop a communications approach that celebrates the modernization of major technology system upgrades.	TBD	TBD	TBD	
New Implement new customer portal.	TBD	TBD	TBD	
New Perform an evaluation of the payroll and HR processes associated with employee timesheets (develop a detailed workflow).	Dave Callahan	TBD	TBD	

STRATEGY 6:

Enhance cybersecurity and technology systems resiliency

Strategy Lead: Guy Lombard

Strategy Impacts: Cybersecurity is one of the most important priorities for any organization, but especially for a water utility that has a responsibility to safeguard water quality and protect public health. Effective implementation of these strategies will help prepare staff at all levels to help protect SWBNO's technology systems and help ensure that all of SWBNO's infrastructure is effectively prepared to face cybersecurity threats.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Expand the orientation module on cybersecurity for new employees.	Melinda Nelson	Mar-22	Jun-22	All orientations now included cybersecurity and other IT information for new employees.
Completed Document cybersecurity policies, communicate relevant policies, and select and deploy training resources.	Guy Lombard	Mar-22	Aug-22	Documentation is complete
Completed Select, purchase, and deploy two cybersecurity software systems in support of the AWIA assessment.	Guy Lombard	Mar-22	Dec-22	Two systems have been deployed.
Underway Develop a plan to expand the radio networks so that SCADA, security, and IT have separate radio frequencies.	Rebecca Johnsey	Feb-22	Dec-22	Awaiting Q4 update
Underway Complete firewall installation.	Curtis Clark	Mar-22	Mar-23	Two minor site installations remaining
Underway Increase the use of video technology for operational/safety/security use.	Jason Higginbotham	Mar-22	Jun-23	Cameras installed at two locations; will add cameras at West Power control and New Orleans East unmanned stations in 2023
New Develop and implement cybersecurity incident playbooks.	Melinda Nelson	Jan-23	Jun-23	

STRATEGY 7:

Improve adoption and integration of current and new technology systems

Strategy Lead: Melinda Nelson

Strategy Impacts: Effective technology means ensuring that staff are equipped to make appropriate use of that technology. Implementation of this strategy means offering training to all staff to ensure that they are prepared to use SWBNO's technology tools as well as developing job descriptions that take into account technology proficiencies required to effectively fill specific positions.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Underway As a component of the training program, complete an assessment of the technology-related skills needed by job position or department.	TBD	Apr-22	Dec-22	Continuing to evaluate method and approach to complete the assessment
Underway Provide a program for those who haven't received the training during orientation to review Board technology, use of technology, and available resources.	Melinda Nelson	Mar-22	Dec-23	Training resources have been developed and classes will begin for managers in Q1 23
New Undertake an assessment of intranet content and convene a group of internal stakeholders to develop processes and norms regarding use and content.	TBD	Apr-23	Dec-23	

FOCUS AREA

Workforce Development and Enrichment

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

FOCUS AREA CHAMPION:

Christy Harowski

Chief of Staff

STRATEGY 8:

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

Strategy Lead: Christy Harowski

Strategy Impacts: Evaluating different models for workforce options will help SWBNO determine the most appropriate model for its organization. This could mean comprehensive change across the organization, which will require momentum and buy-in from staff and leadership.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed 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.	Christy Harowski	Mar-22	Oct-22	Working group is established and cooperative endeavor agreement with Greater New Orleans Foundation; RFP for consulting support is pending Board approval
New Engage with an external consultant to identify workforce issues and opportunities.	WG	Jan-23	Mar-23	
New Work with selected consultant to complete research and analysis.	Consultant/ WG	Mar-23	Jun-23	
New Engage SWBNO staff to solicit input on initial findings and recommendations.	Consultant/ WG	Jul-23	Oct-23	
New Develop formal recommendations for consideration by SWBNO Board.	Consultant/ WG	Nov-23	Dec-23	

STRATEGY 9:

Enhance resources for employee training and development

Strategy Lead: Miera Moore, Kimberly Batiste

Strategy Impacts: Leveraging existing and creating new opportunities to ensure employees have the appropriate resources and benefits to do their jobs and feel appropriately compensated. If implemented correctly, the result will be increased employee morale, more efficient operations, and better performance utility-wide.

Tactics (12 to 18 Months)	Who and When			Comment
	Tactic Owner	Start Date	End Date	
Completed Develop and document an improved employee onboarding program, including tours, safety training, and educational opportunities.	Employee Relations/Miera Moore	Mar-22	Jul-22	New onboarding approach and SMS texting have been implemented.
Completed Create employee total compensation summaries that communicate the value of wages and benefits.	Miera Moore, Kimberly Batiste, Courtney Reed	Jun-22	Dec-22	Salary-only summaries were sent to all employees in December
Underway Initiate Market Study to propose updates to the Uniform Pay Plan[1] and bring wages up to industry standards.	Miera Moore	Jan-22	Dec-23	Study has been included in FY23 budget
New Research options to create Employee Development Fund to allow flexibility in budgeting for growth opportunities like competitions, conferences, and tuition reimbursement.	TBD (Finance/CS)	Jan-23	Dec-23	
New Create employee total compensation summaries that communicate the value of wages and benefits.	Miera Moore, Kimberly Batiste, Courtney Reed	Jan-23	Dec-23	
New Enhance in-house departmental training capacity and resources.	TBD	TBD	TBD	
New Develop training curriculum for internal communications (email, SharePoint, etc.) and deploy tools, techniques, workflows, and methods for staff.	TBD	TBD	TBD	

[1] Uniform Pay Plan changes must be approved by the Civil Service Commission.

STRATEGY 10:

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

Strategy Lead: Miera Moore, Kimberly Batiste

Strategy Impacts: Equipping supervisors and managers with the knowledge and resources they need to best support and lead their teams will increase morale for both supervisors and their employees. If implemented successfully, this strategy will also increase employee accountability by creating more capacity for performance management among supervisors, thereby enhancing organizational efficiency overall.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
New Document current performance management approach and develop enhanced program to be implemented in 2023.	Miera Moore, Kimberly Batiste	Jan-23	Dec-23	
New Department-level leadership development/supervisory training needs assessments.	TBD (Miera Moore)	Jan-23	Dec-23	
New Begin developing training curriculum and deploying supervisory and leadership development training in May 2023.	TBD (Miera Moore)	May-23	Dec-23	

STRATEGY 11:

Strengthen internal communication and information sharing to increase collaboration across departments

Strategy Lead: Corwin Washington

Strategy Impacts: Enhanced internal communication will lead to better coordination and collaboration across departments as well as greater capacity to identify issues and opportunities across operational areas. Different departments have different areas of focus and access to different technology tools and areas of expertise, which may create barriers to collaboration, but also creates opportunities for shared initiatives that utilize these diverse strengths.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Inventory internal communication channels.	Grace Birch/HDR	Mar-22	Dec-22	Tactic is complete and is subsumed in 2023-25 Communications Department plan
Completed Work with HDR Engineering to develop an internal communication strategy.	Grace Birch	Mar-22	Dec-22	Tactic is complete and is subsumed in 2023-25 Communications Department plan
Underway Maintain a complete staff directory for intranet and emergency call trees.	Employee Relations/ HR	Mar-22	Mar-23	Directory is nearing completion, on track to complete by Q1 2023
New Grow and fully develop Communications Department (Comms Dept. 2023-25, Strategy 1).	Grace Birch	TBD	TBD	
New Improve internal communications and cross-departmental collaboration (Comms Dept. 2023-25, Strategy 2).	Grace Birch	TBD	TBD	
New Establish standard workflow and drive use of shared folders to enhance organizational collaboration.	Becca Johnsey	TBD	TBD	

STRATEGY 12:

Improve knowledge capture, transfer, and succession planning

Strategy Lead: Irma Plummer

Strategy Impacts: Succession planning will help ensure that SWNBO has the resources in place to minimize the impact of employee turnover. The impact of this strategy will be to retain the knowledge held by SWNBO's long-standing employees even after employee turnover. Institutional knowledge capture helps train new employees, provides a reference for existing employees, and helps ensure that operations are consistent with best practices. Succession planning also helps reduce the financial and operational impact of staff turnover.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed 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.	Kimberly Batiste	Mar-22	Dec-22	Process has been established and exit interviews now occur regularly
New Evaluate the Deferred Retirement Option Plan (DROP) program and develop preliminary modifications regarding modification**s** to support succession planning before the end of 2022.	Yolanda Grinstead, Irma Plummer	Jan-23	Dec-23	
New Develop succession planning roadmap (research and suggested steps to move forward).	Courtney Reed	Jan-23	Mar-23	

FOCUS AREA

Customer Service Excellence and Stakeholder Engagement

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

FOCUS AREA CHAMPION:

Rene Gonzalez

Chief Customer Service Officer

STRATEGY 13:

Foster a culture of customer service throughout the organization

Strategy Lead: Rene Gonzalez

Strategy Impacts: A culture of customer service means developing the workforce's skill set in engaging with customers. This not only increases staff's confidence in their ability to assist customers in a variety of situations but also enhances the customer experience. In order for this strategy to be successful, new employees should receive customer service training as part of their onboarding and existing staff should receive continuous training. Success also depends on staff's willingness to adapt, grow, and be accountable for their part in creating a culture of customer service.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Inventory existing training and technology used to support customer-facing representatives.	Nichol Green	Apr-22	Jun-22	Developed a 2023-2025 Communications Department Plan to address needs
Completed Collaborate with the Workforce Development & Enrichment focus team to enhance customer service-focused aspects of the on-boarding program.	Matt LaFrance	Mar-22	Jul-22	Customer service content has been incorporated into the onboarding program
Completed Conduct a gap analysis between current and desired skills and competencies.	Rene Gonzalez (+CS Leadership)	Jul-22	Oct-22	Gaps have been identified, preparing training programs to close gaps in 2023
Completed Advance a continuous improvement pilot program within Customer Service.	Rene Gonzalez, Gabe Bordenave	Mar-22	Dec-22	Pilot program has successfully completed a process improvement to integrate the SWBNO's plumbing function with the City's One-Stop initiative
Underway Identify and deploy high-impact training and tools that can help bridge the gap, including refresher training.	Rene Gonzalez (+CS Leadership)	Apr-22	Mar-23	Will focus on delivering enterprise-wide customer service skills training in 2023
New Continue advancing continuous improvement process with specific process improvement initiatives.	Rene Gonzalez, Gabe Bordenave	Jan-23	Dec-23	
New Create internal training capacity to close identified knowledge and skill gaps.	TBD	TBD	TBD	
New Enhance customer service delivery accountability.	TBD	TBD	TBD	

STRATEGY 14:

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

Strategy Lead: Waldeen Mitchell

Strategy Impacts: Customer self-service options are beneficial for both customers and staff. Customers have the benefit of convenience as well as fast service. Staff do not have to spend as much capacity on straightforward tasks, allowing them to devote more time to higher-level issues, work-planning, and other responsibilities. The result is increased efficiency and productivity, as well as enhanced customer service.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Investigate additional customer payment locations.	Tiffany Julien	Apr-22	Jun-22	Work has begun adding additional payment options
Completed Evaluate opportunities to expand and promote Fidelity Express and increase customer payment locations.	Stephanie Thomas	Apr-22	Jun-22	Successfully maximized the number of Fidelity Express locations
Underway Implement Verint support for Customer Relationship Management (CRM) software.	Gabe Bordenave	Mar-22	Mar-23	Continuing to work through integration and will complete in Q1 2023
Underway Inventory and explore increased multi-lingual resources (website, printed materials, etc.).	Waldeen Mitchell	Mar-22	Jun-23	Continuing to move forward despite challenges; 2023 focus will be on enhancing resources for walk-in customers
New Deploy new online customer portal.	TBD	TBD	TBD	

STRATEGY 15:

Elevate core customer service delivery performance

Strategy Lead: Monique Chatters

Strategy Impacts: In order for customer service delivery to be as successful as possible, it is important to ensure that the core aspects of the service, such as communication to customers and meter reading, are as effective and accurate as possible. Implementation of this strategy helps cultivate a strong customer service foundation on which SWBNO can build future initiatives.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Identify and procure vehicles to resource Meter Readers.	Rene Gonzalez, Monique Chatters	Mar-22	Dec-22	Successfully procured adequate vehicles
Completed Implement a quality control/audit program for meter reading accuracy.	Andrea El-Mansura	Mar-22	Dec-22	Program has been implemented and is working effectively
Completed Evaluate and recommend improvements to the meter reading incentive program.	Monique Chatters, Patricia Davenport, Andrea El-Mansura	Apr-22	Dec-22	Implemented new meter reading strategy and have realized significant improvement in actual vs. estimated meter reads
Completed Review and streamline the customer dispute process.	Chris Robertson	Apr-22	Dec-22	Program has been implemented and is working effectively
Underway Inventory, assess, and improve resources to help customers understand high and estimated bills.	Patricia Davenport	Mar-22	Jun-23	Planning to deploy digital, print, and in-person education resources and activities in 2023
New Deploy a customer service survey - transactional and full customer base.	Rene Gonzalez	Jan-23	Dec-23	
New Review reduction in disputes and examine the dispute workflow with emphasis on customer communication and consistency of outcomes.	Chris Robertson, Gabe Bordenave	TBD	TBD	

STRATEGY 16:

Advance proactive communication and outreach programs

Strategy Lead: Grace Birch

Strategy Impacts: Effective implementation of this strategy involves educating the public on SWBNO Customer Service's offerings and processes and proactively communicating to customers. Consistent, transparent communication builds trust with customers. If customers trust the process, they will be less likely to dispute bills, which will make the process of issuing bills and collecting revenue more efficient.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Develop customer-facing dashboards with meaningful data.	Grace Birch	Mar-22	Aug-22	Externally-facing customer service dashboards are complete
Completed Identify organizational (external) communication and outreach needs and resources.	Grace Birch	Feb-22	Dec-22	Developed a 2023-2025 Communications Department Plan to address needs
Completed Perform a gap assessment and develop a roadmap for customer communications.	Grace Birch	Mar-22	Dec-22	Gap assessment complete, roadmap is outlined in 2023-2025 Communications Department Plan
Completed Develop and deliver a comprehensive communication outreach plan.	Grace Birch	Mar-22	Dec-22	2023-2025 Communications Department Plan is developed; implementation will begin in January 2023
Completed Continue advancing specific messaging initiatives.	Grace Birch	Mar-22	Dec-22	Water Quality Report and annual update are complete; established schedule for future initiatives
Completed Develop customer-facing dashboards with meaningful data.	Grace Birch	Mar-22	Aug-22	Externally-facing customer service dashboards are complete
New Elevate external communication efforts (Comms Dept. 2023-25, Strategy 3).	Grace Birch	TBD	TBD	
New Expand media relations efforts (Comms Dept. 2023-25, Strategy 4).	Grace Birch	TBD	TBD	

FOCUS AREA

Infrastructure Resiliency and Reliability

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

FOCUS AREA CHAMPION:

Ron Spooner

General Superintendent

STRATEGY 17:

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

Strategy Lead: Fred Tharp, David Cappel, Ashraf Abdelbaqi

Strategy Impacts: More reliable infrastructure can be achieved through disaster planning, real-time updates of infrastructure repairs and replacements, development of a repository for asset inspection, scheduling of asset repairs, and the integration of asset mapping with asset attributes. If implemented successfully, the result of this strategy will be less reliance on contractors for maintenance activities and a reduction in employee downtime because of the implementation of a comprehensive preventive maintenance schedule.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Conduct a preliminary asset risk assessment to identify vulnerabilities.	Fred Tharp, David Cappel, Ashraf Abdelbaqi	Feb-22	May-22	The risk assessment is complete
Completed Form an internal AM working group by 2023 to meet on a monthly basis.	Ron Spooner, Charles Sauerwin	Apr-22	Dec-22	Working group has been formed and monthly meetings are underway
Underway Develop a scope of work and select a vendor to serve as owner/agent to develop a procurement instrument for the new AM system.	Kaitlin Tymrak, Robert Hicks	Mar-22	Mar-23	On-call RFP is complete, currently screening vendors approved by the Board
New Initiate Needs Assessment.	TBD	Jul-23	Sep-23	
New Publish RFP for Asset Management system.	TBD	Oct-23	Dec-23	
New Begin implementation of Asset Management system.	TBD	Apr-23	TBD	

STRATEGY 18:

Replace and renew aged infrastructure using integrated approaches

Strategy Lead: Steven Giang

Strategy Impacts: The use of integrated approaches to renew aging infrastructure will result in less reliance on reactive maintenance and greater implementation of proactive maintenance structures. This will allow maintenance staff to focus on residential needs and emergency issues. An asset management system and an infrastructure replacement model will also allow leaders and other stakeholders to gain a better understanding of facilities issues and which facilities require replacement or improvement.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Underway Catalogue resource needs across water, wastewater, and stormwater drainage systems.	Kaitlin Tymrak	Mar-22	Jan-23	A high priority project list has been developed and a memo will be circulated in early 2023
Underway Ensure sufficient resources for integrated planning efforts by communicating needs and value to the Board, stakeholders, and the public.	TBD	Mar-22	Sep-23	This activity will become owned by one of the new Deputy General Superintendents in 2023
New Circulate infrastructure needs memo/spreadsheet and solicit staff input.	TBD	Jan-23	Jun-23	

STRATEGY 19:

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

Strategy Lead: Chris Bergeron

Strategy Impacts: Successfully delivering critical capital improvement projects means finishing projects on time and on or under budget. The impact of successful implementation of this initiative will be fewer change orders and more accurate budgets. Successful implementation depends on organizational buy-in as well as the ability to attract and retain talent.

Tactics **(12 to 18 Months)**	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Underway Develop an enhanced way to monitor and communicate capital delivery performance.	Nader Jaber	Mar-22	Jun-23	Awaiting Q4 update
Underway Conduct an assessment of the contract management process to improve consistency and streamline processes.	Mark Van Hala, Chris Bergeron, Kaitlin Tymrak, Steven Giang, Kyle Breaux	May-22	Dec-23	Continuing to inventory and assess the current process, will be a key focus in 2023
New Increase capacity for procurement and contracting.	Grey Lewis, Yolanda Grinstead	Jan-23	Dec-23	
New Increase external communications working with new communications staff.	TBD (Community Outreach Specialists)	Jan-23	Dec-23	
New Establish enhanced collaboration between SWBNO construction project managers and community outreach specialists.	TBD	Jan-23	Dec-23	

STRATEGY 20:

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

Strategy Lead: Tyler Antrup

Strategy Impacts: System master planning that incorporates community voices and green infrastructure will promote resilient operations and processes that can quickly adapt to emergency events, as well as more efficient disaster recovery. SWBNO will realize cost savings and be able to deliver services to the City reliably, even during major client events.

Tactics (12 to 18 Months)	Who and When			Comment
	Tactic Owner	Start Date	End Date	
Underway Develop strategies to reduce greenhouse gas emissions to target levels.	Felicia Bergeron	Mar-22	Dec-22	Awaiting Q4 update
Underway Work with Board of Directors and Leadership Team to develop a framework for overall integrated system master planning efforts.	Tyler Antrup	Mar-22	Dec-23	Draft scope for Water Purification Master Plan (facilities only) has been developed and a consultant will be selected in 2023
Underway Complete the sewerage model.	Steven Giang	Mar-22	Jul-24	Model is largely complete, continuing to refine and use it for project planning
Underway Update models and implement plans for stronger storms.	Jason Higginbotham	Mar-22	Jul-27	Models are mostly complete, currently working on prioritization of projects going forward
New Conduct Water Treatment Plant Master Plan.	TBD	Jan-23	Jun-23	

FOCUS AREA

Organizational and Operational Improvement

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

FOCUS AREA CHAMPION:

Kaitlin Tymrak

Business Services Lead

STRATEGY 21:

Evaluate and modify organizational structure and staffing levels to improve service delivery

Strategy Lead: Kaitlin Tymrak

Strategy Impacts: Effective organizations rely on clearly defined organizational structures that clearly define the scopes of different functional groups and ensure that managers and supervisors have appropriate spans of control. Analyzing SWBNO's organizational structure will help the organization identify gaps and areas of overlap among functional groups, allowing for clearer definition of roles and responsibilities and of staffing needs, cost and time savings, and more efficient decision-making.

Tactics (12 to 18 Months)	Who and When			Comment
	Tactic Owner	Start Date	End Date	
Completed Complete the General Superintendent's Office (GSO) structure assessment to realign staff with needs.	Kaitlin Tymrak	Mar-22	May-22	GSO assessment is complete
Completed Complete job studies for Deputy General Superintendents and USSA/SEDM/USA/EDM level for GSO.	Miera Moore	Feb-22	Sep-22	All job studies are complete
Completed Obtain approval from civil service for Deputy General Superintendents and USSA/USA/SEDM/EDM levels.	Kaitlin Tymrak	Feb-22	Dec-22	Relationship with Civil Service
Completed Develop Project Management series classifications and propose to Civil Service.	Rebecca Johnsey	Feb-22	Dec-22	Presented series classifications to Civil Service Commission in December 2022
Completed 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).	Kaitlin Tymrak	Mar-22	Dec-22	Training framework has been developed
Completed Targeted recruitment to fill positions as they become available.	Miera Moore	Mar-22	Dec-22	Two positions are now filled; a third will be filled in 2023
New Implement West Power Complex staff transition plan.	Kaitlin Tymrak	Jan-23	Dec-23	
New Develop and implement smart metering staffing structure.	Kaitlin Tymrak, Nader Jaber	TBD	TBD	
New Enhance recruitment for engineers and project managers.	Kaitlin Tymrak, Nader Jaber	TBD	TBD	
New Establish an operational technology group (i.e., control systems, radios, etc.).	Kaitlin Tymrak, Nader Jaber	TBD	TBD	

STRATEGY 22:

Enhance and elevate safety culture

Strategy Lead: Chad Fava

Strategy Impacts: Safety is a guiding principle for all of SWBNO's actions. Enhanced safety training will equip staff to do their jobs as safely as possible, resulting in cost savings and improved worker welfare due to a reduction in the number of injuries and days off work, as well as enhanced employee morale. Successful implementation of a safety program will require effort from safety advocates at all levels of the organization as well as funding for staff resources to develop and implement the program.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Review and document the Safety Department structure and composition to align with actual and future needs and to achieve the department's vision.	Chad Fava	Mar-22	Sep-22	Department changes identified and documented
Completed Develop a proposal to establish a safety rewards program.	Chad Fava	Sep-22	Dec-22	Proposal complete, will implement in 2023 following creation of new positions
Completed Develop a set of Safety Guiding Principles for the organization and present them to leadership for buy-in and widespread communication.	Chad Fava	Mar-22	Feb-23	Safety manual has been updated regarding all safety principles
Underway Review the existing 'Safety Liaison Program' for effectiveness and impact and recommend modifications.	Chad Fava	Mar-22	Dec-22	Awaiting Q4 update
New Create and implement the safety rewards program.	Chad Fava	TBD	TBD	
New Communicate safety guiding principles across the organization.	Chad Fava	TBD	TBD	
New Establish routine check-ins between the Safety Department and GSO managers.	Chad Fava	TBD	TBD	
New Implement new safety department structure.	Chad Fava	TBD	TBD	

STRATEGY 23:

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

Strategy Lead: Jackie Spencer

Strategy Impacts: Regular review of programs and processes is an essential tool for ensuring that the programs are functioning as effectively and efficiently as possible, and that implementation of the program is standardized throughout the organization. Implementing continuous improvement programs, as well as change management programs to oversee implementation of new processes, increases consistency and efficiency in both internal and public-facing operations.

Tactics (12 to 18 Months)	**Who and When**			**Comment**
	Tactic Owner	**Start Date**	**End Date**	
Completed Identify up to five high yield/low effort processes that can be reviewed and improved in the next 12 months.	Jackie Spencer	Mar-22	Sep-22	Six opportunities identified
Completed Identify small teams to review and improve the selected high yield/low effort processes.	Jackie Spencer	May-22	Dec-22	2022 process improvements complete, 3 projects planned for 2023
Underway Create a Continuous Improvement Officer (CIO) position and a Project Manager position to support data gathering, monitoring, and reporting.	Tyler Antrup	Mar-22	Mar-23	Position is budgeted for FY23 and recruitments will begin in Q1
New Establish an SOP working group lead by the new CIO to identify key personnel throughout the organization who own organizational processes.	Jackie Spencer	Jan-23	Dec-23	
New Effectively on-board the new CIO to ensure quick impact/success.	TBD	TBD	TBD	

STRATEGY 24:

Develop and share organizational performance metrics internally and externally

Strategy Lead: Tyler Antrup

Strategy Impacts: Developing and sharing performance metrics utilizing easily understood graphs and charts increases awareness of SWBNO's projects, processes, and services. Utilizing dashboards and other common reporting tools aims to collect and consolidate data in a consistent and effective manner. It will be important to set specific performance targets so that we can monitor process, illustrate progress towards targets, and compare ourselves to other similar utilities.

Tactics (12 to 18 Months)	Who and When			Comment
	Tactic Owner	Start Date	End Date	
Completed Solicit feedback from the Leadership Team (or designees) on what data they feel is important to share internally and externally for performance management.	Tyler Antrup	Mar-22	Sep-22	A list of key performance measures has been identified
Completed Identify specific measures to benchmark against the industry and peer utilities.	Tyler Antrup	Apr-22	Nov-22	Benchmarks have been incorporated into organizational performance reporting
Completed Based on responses from the Leadership Team, inventory existing data availability and data location.	Tyler Antrup	Jun-22	Nov-22	Metric data availability and location has been identified
Completed Identify targets for performance data shared via dashboards.	Tyler Antrup	Jun-22	Dec-22	Appropriate targets have been set for key organizational metrics
Underway Track the strategic plan implementation process.	Tyler Antrup	Mar-22	Dec-23	A quarterly progress and performance reporting process is now in place; 2023 focus will be optimizing monthly performance metric reporting
New Leverage SharePoint to operationalize metric data collection.	Tyler Antrup	Jan-23	Feb-23	
New Provide a standard reporting format.	Tyler Antrup	Apr-23	Jun-23	