



City of Lee's Summit Water Utilities

Strategic Plan – WUAB Meeting 4 of 4



September 2023

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01

Overview of the Strategic Plan Process

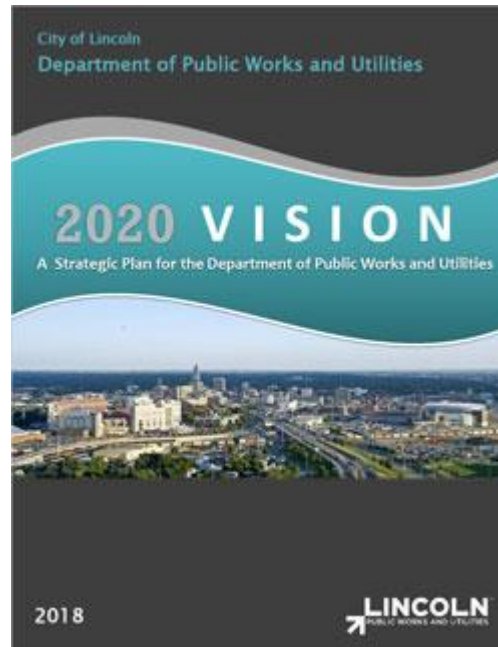


Sources of Input

DATE	EVENT	INTENT
2022	 Customer Survey	Gather customer input regarding the quality of water and sewer services.
2022	 Employee Survey	Objectively assess employee satisfaction and solicit input on issues in seven major areas.
2023	 Draft Utility Assessment	Compare Water Utilities to industry standards, as benchmarked by the American Water Works Association (AWWA), as well as a progress report on Water Utilities' implementation of its 2011 Strategic Plan.
2023	 Customer Survey	Gather customer input regarding the quality of water and sewer services.
March - April 2023	 WUAB Meetings	Review strategic planning process, current (2011) Water Utilities Strategic Plan with implemented initiatives, and findings of the 2023 Draft Utilities Assessment. Review and develop topics for inclusion in this Strategic Plan.
March - May 2023	 Water Utilities Leadership Meetings	Develop, organize, and refine the Strategic Plan goals, attributes, and strategies that make up this planning document.

State of the Industry - Water Sector Strategic Plans

01



- ✓ Engaging
- ✓ Accessible
- ✓ Educational
- ✓ Values based
- ✓ Conveys accountability
- ✓ Linked to community priorities
- ✓ Future oriented
- ✓ Confidence generating

02

Contents of the Strategic Plan

September 2023

STRATEGIC PLAN



Facilitated by



Objectives of the Strategic Plan

02

- 1) Provides stakeholders with a **better understanding** of how Lee's Summit Water Utilities operates
- 2) Conveys Water Utilities' organizational **mission, vision, and values**
- 3) Articulates Water Utilities' organizational **attributes, goals, and strategies**
- 4) Communicates **accomplishments** from the last decade
- 5) Imparts the plan to address **future challenges** and to drive continuous improvement

Components of the Strategic Plan

02

Message from the Director – introducing the SP

1) Project Team – identifies participants

2) Our Process – describing the development of the SP

3) Our Story – how Water Utilities is organized and operates

4) Our Accomplishments and Challenges – what Water Utilities has done and is focused on

5) Our Plan – the roadmap for the future

6) Engaging with You – encouraging community participation

LS WATER UTILITIES
LEE'S SUMMIT

Attributes of effective **UTILITY MANAGEMENT**

ENGINEERING & FACILITIES

WATER ADEQUACY
INFRASTRUCTURE STABILITY
COMMUNITY SUSTAINABILITY

OPERATIONS

OPERATIONS OPTIMIZATION
PRODUCT QUALITY

BUSINESS SERVICES

FINANCIAL VIABILITY
STAKEHOLDER SUPPORT

CUSTOMER CARE

CUSTOMER SERVICE
EMPLOYEE/LEADERSHIP
DEVELOPMENT

ADMINISTRATION

RESILIENCY

Attributes



Goals



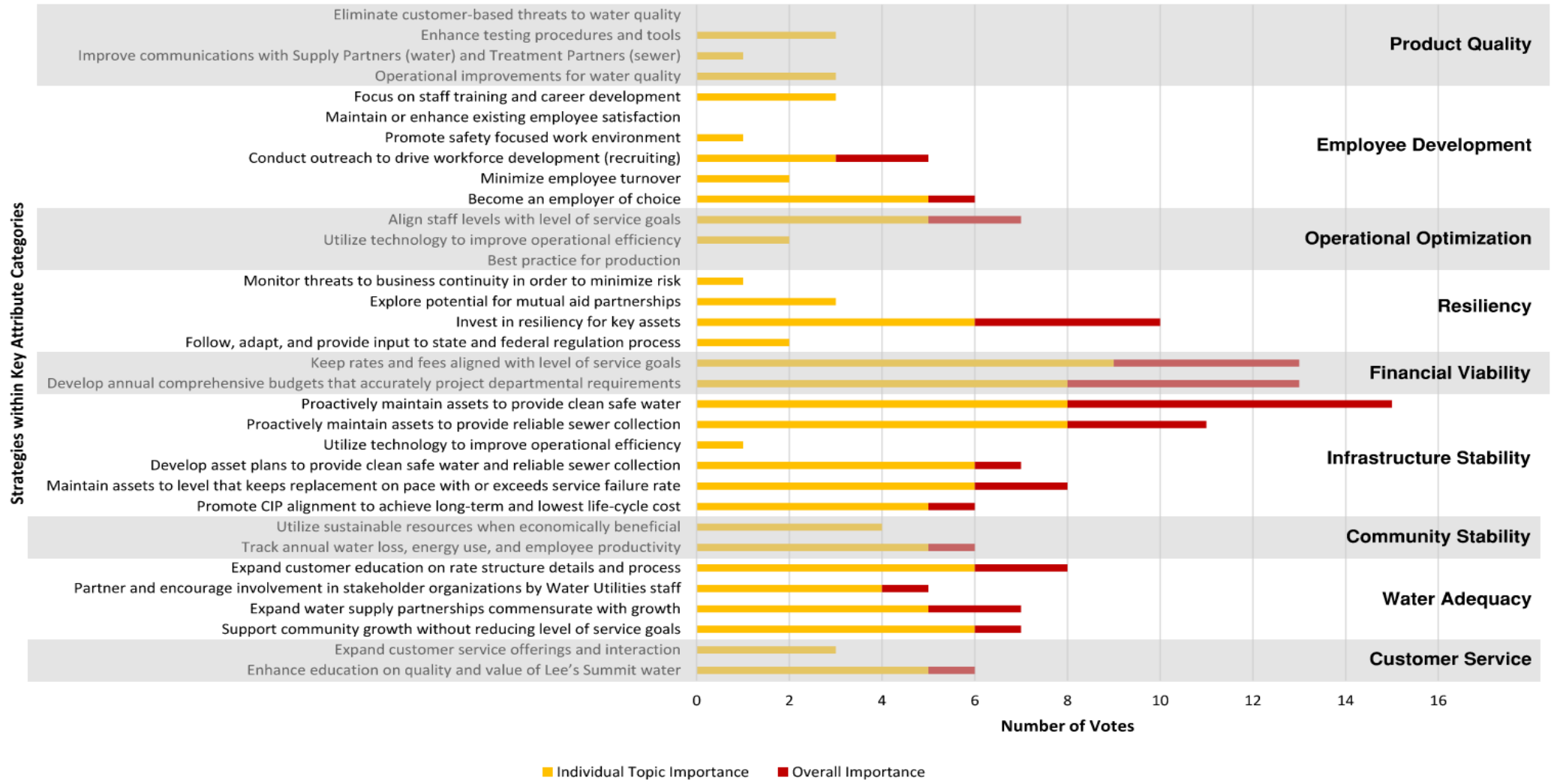
Strategies

03

Addressing WUAB Priorities

Stakeholder Input Process: Current Status

WUAB Strategy Ranking (3/20/23)



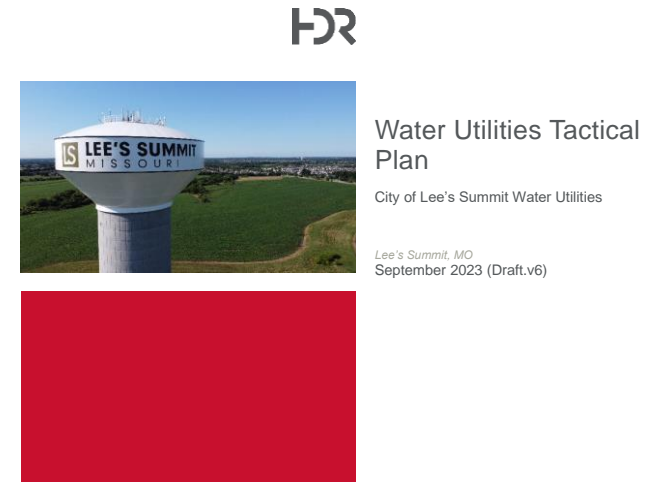
Strategic Plan Reflects WUAB Priorities

WUAB Priority	Water Utilities' Attribute(s)	Selected Supporting Strategy(ies)
1) Proactively maintain assets to provide clean safe water	Infrastructure Stability	<ul style="list-style-type: none"> 1.1 - Protect and maintain water quality in accordance with State and Federal regulatory requirements. 1.3 - Proactively maintain assets to provide reliable distribution and delivery of drinking water.
2) Develop annual comprehensive budgets that accurately project departmental requirements	Financial Viability	<ul style="list-style-type: none"> 5.1 - Manage debt and cash reserves to ensure successful execution of our long-range plans, meet short-term needs, and prepare Water Utilities for an uncertain future.
3) Keep rates and fees aligned with level of service goals	Operational Optimization, Financial Viability	<ul style="list-style-type: none"> 1.8 – Align staffing requirements with level of service goals. 5.1 - Manage debt and cash reserves to ensure successful execution of our long-range plans, meet short-term needs, and prepare Water Utilities for an uncertain future.
4) Proactively maintain assets to provide reliable sewer collection	Infrastructure Stability	<ul style="list-style-type: none"> 1.4 - Proactively maintain assets to provide reliable sewer collection and conveyance.
5) Invest in resiliency for key assets	Resiliency, Infrastructure Stability	<ul style="list-style-type: none"> 1.6 – Manage Water Utilities in a manner which maximizes continuity of service. 1.9 - Invest in resilience for key assets.

04

Introduction to the Tactical Plan

From Strategic Plan to Tactical Plan



- ✓ Engaging
- ✓ Educational
- ✓ Conveys accountability
- ✓ Connected to community priorities
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- ✓ Confidence generating

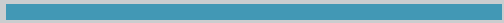
- ✓ Strategy linked
- ✓ Specific
- ✓ Operationalized
- ✓ Benchmarked
- ✓ Accountable
- ✓ Time bounded

Tactical Plan Example – Water Quality

1. <u>GOAL: Deliver Infrastructure and Operational Excellence</u>	PLANNING PERIOD			OTHER					
<i>Strategy</i> Tactic	Long-Term	Mid-Term	Short-Term	Recurrence Frequency	City Department Support	Requires External Support	Division Lead	Educational Material Required (new, existing)	Aligns with <i>IGNITE!</i> Elements
1.1. Protect and maintain water quality in accordance with State and Federal regulatory requirements.									
1.1.1. Adopt an online portal solution for the backflow prevention program that includes annual test report management.			X		IT		C	both	PF
1.1.2. Finalize the backflow prevention program cost allocation methodology for the software.			X		IT		C		PF
1.1.3. Review and update City Code of Ordinances Chapter 32, Article III. - Backflow Prevention.			X		Law		D		PF
1.1.4. Create a reporting tool that is visible to management staff and improves tracking of current water quality test results.		X					F, OP		PF
1.1.5. Formalize a policy and procedure for collecting, tracking, processing, documenting, and reporting water quality test results.			X				OP		PF

05

Feedback



06

Next Steps



Next Steps

- September 2023
 - Finalize Strategic Plan and Tactical Plan
- October 2023
 - Present Strategic Plan to the Public Works Committee and City Council

HDR