



WATER UTILITIES
LEE'S SUMMIT

September 2023

STRATEGIC PLAN



Facilitated by





MESSAGE FROM THE LEE'S SUMMIT WATER UTILITIES DIRECTOR

It is my honor to present the Lee's Summit Water Utilities Department's 2023 Strategic Plan.

Lee's Summit Water Utilities has been serving this community for over 100 years, and we take great pride in the essential work that has been done throughout our history to sustain the quality of life in our community.

Water Utilities is an "Anchor Institution" as defined by the US Environmental Protection Agency. Anchor institutions are:

- ✓ Public service entities—like hospitals, universities, or utilities—which are tied to a location due to infrastructure or mission.
- ✓ Entities that provide critical services and vital assets to improve the economy, health, environment and well-being in communities.
- ✓ Organizations that provide active civic leadership and participate in and add to the public life and character of their community.

A strategic plan is important because it provides a clear vision and direction for the utility. It outlines the Department's goals, objectives, and desired outcomes, and serves as a roadmap to guide decision-making and resource allocation.

The City of Lee's Summit implemented the IGNITE! Strategic Plan in 2020 and the Water Utilities Department understands its responsibility and obligations to achieve the applicable IGNITE! initiatives. As such, you will find many strategies from the IGNITE! plan woven into the goals of this document.

A wide variety of people spent many hours on the development of this document, including the Water Utility Advisory Board, which is comprised of a diverse group of customers. We collected valuable insights from the City Manager's office, elected officials, and utility staff. By involving customers in the decision-making processes, we enhance customer satisfaction, promote customer confidence, and strengthen public trust.

The Water Sector is a profession of distinction and is no easy job. We recognize that as Lee's Summit continues to evolve, so does our workforce. It's critical that we adapt and strategically develop ways to maintain a stable and highly qualified workforce in order to satisfy customers' expectations for water and wastewater services.

This Strategic Plan is another example of how Lee's Summit Water Utilities is committed to the health and safety of the community while serving YOU with exceptional service, safety, integrity, and pride.

Sincerely,
 Mark Schaufler
 Director of Water Utilities



1. PROJECT TEAM

Lee's Summit Water Utilities Leadership / Staff	Water Utility Advisory Board Members	Consultant Team (HDR)
Mark Dunning City Manager Ryan Elam Assistant City Manager Mark Schaufler Director of Water Utilities Jeff Thorn Deputy Director Brent Boice Assistant Director of Business Services Dom Bennett Assistant Director of Customer Care Chris Sandie Assistant Director of Operations Jeremy Young Utility Manager Mike Riley Utility Operations & Maintenance Manager Joe San Nicolas Financial Services Manager	Mike Atcheson Anthony Columbatto Kyle Gorrell Glen Jones Roger Tilling Cynda Rader Mark Leetch Bryon Livingston Colleen Fullerton City Council Liaison: Council member Andrew Felker	Patrick Young, P.E. Michelle Carter, P.E. Eric Farrow, P.E. Mike Brink



2. OUR PROCESS







2.1 OVERVIEW

This Strategic Plan is intended to serve the following purposes:

- » Provide stakeholders with a better understanding of how Lee's Summit (Water Utilities) operates
- » Convey Water Utilities' organizational mission, vision, and values
- » Communicate major accomplishments from the last decade
- » Impart the plan to address future challenges and drive continuous improvement

2.2 PROCESS & TIMELINE

In December 2022, Water Utilities initiated a strategic planning process to establish an updated vision and framework for guiding it towards goal achievement. This effort incorporated Water Utilities' 2011 Strategic Plan and feedback received through the 2022 and 2023 Customer and 2022 Employee surveys. The plan also includes outcomes from the 2023 Utility Assessment report, input from stakeholder meetings with the resident-led Lee's Summit Water Utilities Advisory Board (WUAB), and feedback from Water Utilities Supervisors. Key steps in developing this Strategic Plan included the following:

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.



3. OUR STORY

3.1 WHO WE ARE

Water Utilities provides drinking water and wastewater services to the City of Lee's Summit (City) and serves approximately 40,000 customers with a total population of approximately 101,100.

Water Utilities is funded by the rates charged its customers and not from general City tax revenues like property taxes. Types of Water Utilities charges include consumption fees based on water and wastewater use, connection fees to recover the cost of new infrastructure necessary to provide service to new customers, and localized fees used by the City to cover the cost of projects that benefit customers on only one portion of the system.

Water Utilities does not treat raw water but instead purchases already-treated water from other utilities, predominantly the City of Kansas City, MO Water Utility (KC Water) and the City of Independence Water Department (City of Independence). Water Utilities meets an average demand of 10.5 million gallons per day (MGD), with a system capacity of approximately 32.5 MGD. Water Utilities maintains more than 5,300 fire hydrants and 8,000 in-line valves in the water distribution system. The system encompasses approximately 630 miles of water main along with four pumping stations and nine water towers and storage tanks.

Water Utilities does not treat wastewater but contracts the service with other utilities, including the Little Blue Valley Sewer District (LBVSD) and the Middle Big Creek Subdistrict (MBCSD, part of LBVSD). The City owns and operates a sewer collection system consisting of approximately 500 miles of gravity sewer and 55 miles of force main. There are approximately 10,000 manholes in the sewer collection system.

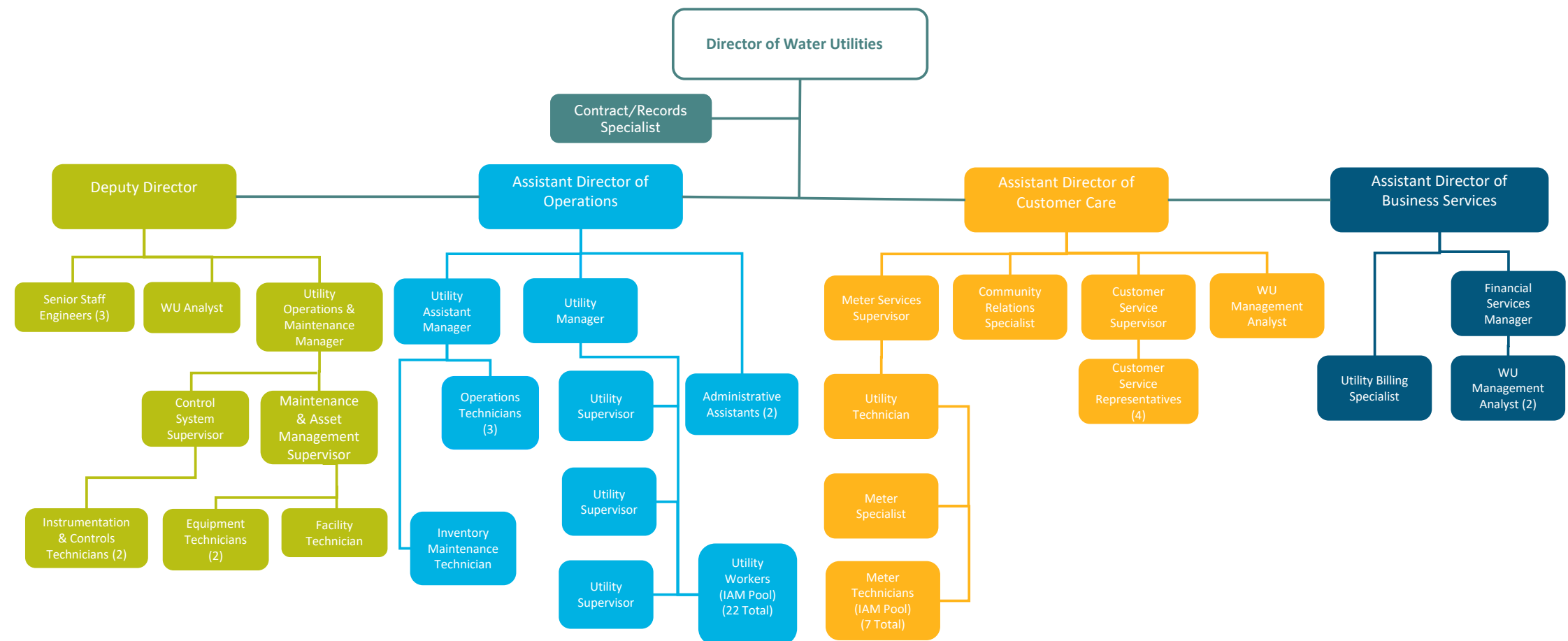
3.2 HOW WE'RE CONNECTED

Water Utilities provides an integral service to the community. At home, work, or play, its customers rely on its services daily. As such, Water Utilities is committed to listening to what community members have to say and using that input to develop system improvements. This is accomplished in several ways:

IGNITE! INITIATIVE

We are nothing if not team players, so we're connected to the City of Lee Summit's strategic planning initiative and the resulting document - IGNITE! Fuel Our Future. IGNITE! sets forth goals, policies, actions, and standards to define community development and programs for a 20-year period. Updates to IGNITE! will be made by the City on an annual basis.

This Water Utilities Strategic Plan is aligned with the IGNITE! initiative and positions Water Utilities to contribute to the achievement of IGNITE!'s key elements. The Water Utilities goals detailed in Section 3.4 of the Strategic Plan align closely with key IGNITE! elements.



Additional relevant direction provided by the IGNITE! Strategic Plan to Water Utilities' operations include:

- » Creating awareness among residents about the importance of quality infrastructure
- » Ensuring sustainable funding mechanisms for infrastructure maintenance
- » Establishing and actively managing a comprehensive asset management plan
- » Exploring opportunities to enhance sustainable practices

CUSTOMER SATISFACTION SURVEY

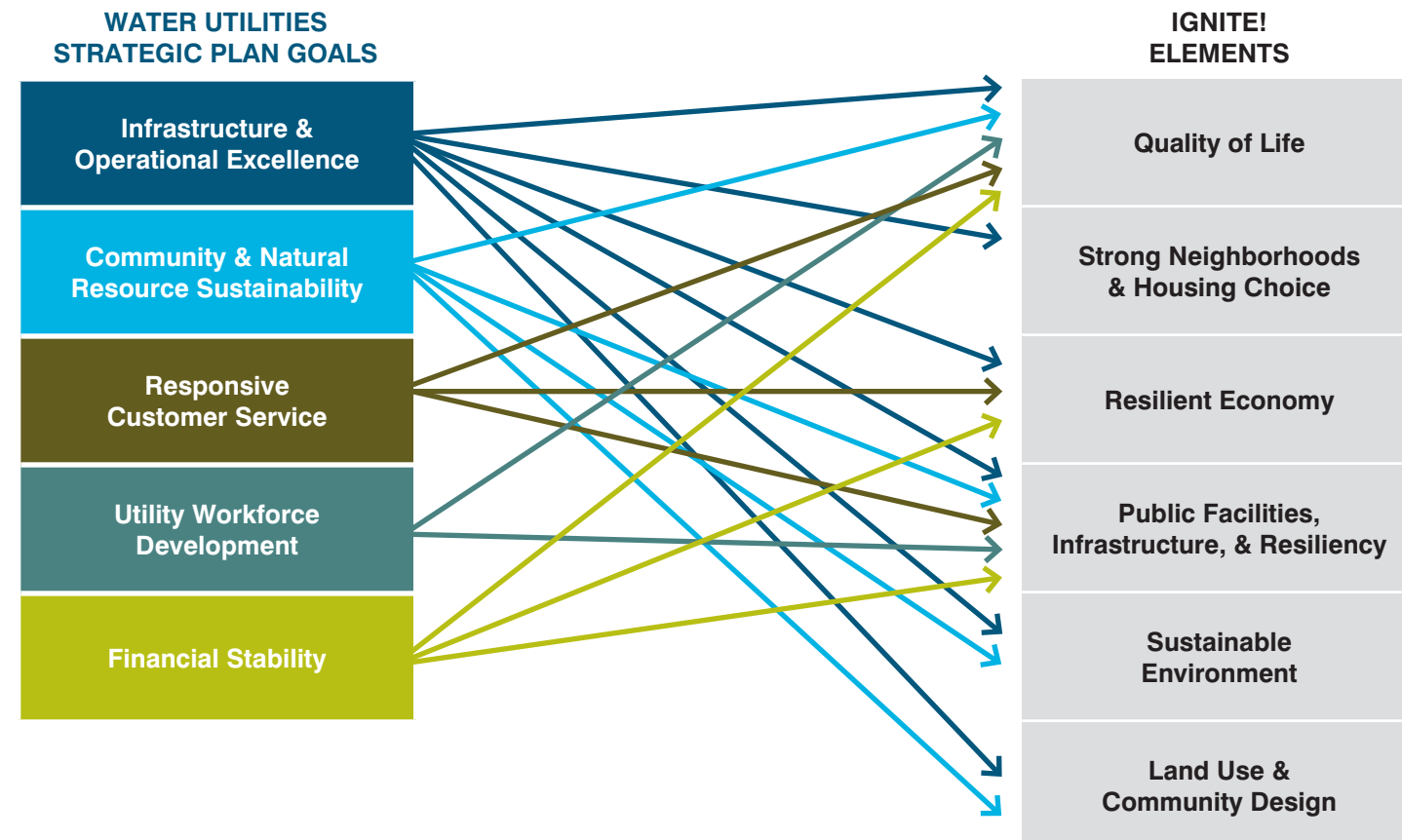
Understanding customers' opinions about their services and using public insight to identify system needs is crucially important. Water Utilities' most recent Customer Satisfaction Survey (CSS) was administered in Spring 2023 by the ETC Institute and sent to a random sample of customers inside Water Utilities' service area. The survey included questions about customers perceptions relative to matters such as infrastructure reliability, utility responsiveness,

and rates and billing. To further support survey and benchmark analysis, polling results were considered alongside outcomes and metrics from unaffiliated water utility systems with comparable operations and customer bases.

Water Utilities conducted additional surveys in 2022, 2021, and 2010, and intends to conduct an annual survey going forward. By heeding the feedback gained through public polling, Water Utilities has achieved steady improvement in the CSS response rate and across several areas of focus.

WATER UTILITY ADVISORY BOARD

Water Utilities regularly consults WUAB, representing Lee's Summit residents, developers, and business owners, to get thoughtful feedback. WUAB provides input to the City Council on the services, financial policies, planning, fees, and charges of the Water Utilities Department with the goal of helping to ensure the efficient and sustainable provision of its services.



3.3 WHAT GUIDES US

Water Utilities is a community anchor institution on the front lines of safeguarding public health and protecting the local environment. Similar to other public service entities like hospitals and universities, Water Utilities provides critical services and vital assets to improve the economy, health, environment, and overall well-being of the community.

OUR MISSION

Lee's Summit Water Utilities provides reliable water and sanitary sewer services responsibly and efficiently for the health and safety of our community with exceptional customer service, integrity, and pride.

OUR VISION

To support the vitality and quality of life in the community we serve through the delivery of excellent water services.

OUR VALUES

♥ INTEGRITY – We conduct ourselves in a manner that surpasses ordinary standards with the highest professionalism and ethical behavior by consistently seeking to be open, honest, fair, respectful, and accountable.

♥ SERVICE - We see every engagement with our customers as an opportunity to deliver an exceptional customer experience that improves customer satisfaction and the overall perception of the utility in the community we serve.

♥ RELIABILITY - We understand the condition of, and costs associated with critical infrastructure assets. We maintain and enhance the condition of all assets over the long-term at the lowest possible life cycle and acceptable risk consistent with customer, community, and regulator-supported service levels, and consistent with anticipated growth and system goals.

♥ SAFETY - We are uncompromising in our commitment to the health and safety of our employees, customers, and community. We require individual accountability, expecting all employees to strictly adhere to our safety standards, and actively participate in and support the advancement of our safety practices.

♥ PRIDE - We approach all we do with enthusiasm, helpfulness, positivity, skills, knowledge, and a collective commitment of excellence to our stakeholders.

3.4 GOALS

Drawing from Water Utilities' mission, vision, and values, and the professional standards developed by key industry organizations like the AWWA, Water Utilities identified the following goals for the next decade of operations:

1. DELIVER INFRASTRUCTURE AND OPERATIONAL EXCELLENCE

Delivering high-quality, reliable water and wastewater services to the Lee's Summit community is what Water Utilities is all about. The less our customers must think about the daily reliability of our services, the better. We will continue to employ industry best practices in operations, maintenance, capital planning, and construction to that end.

- » **Water Utilities will deliver value through employee involvement, process optimization, and asset stewardship.**

2. PROMOTE COMMUNITY AND NATURAL RESOURCE SUSTAINABILITY

The abundance of our critical natural resources can no longer be taken for granted. Natural resource sustainability is not an aspiration, but a necessity. Water Utilities' efforts to provide effective and efficient water and wastewater services includes collection system management to reduce wet weather overflows and preserve water quality. We align our supply contracts to ensure water adequacy consistent with growth projections for future generations.

- » **Water Utilities will promote environmental stewardship in its planning and operations to conserve and preserve our precious water resources.**

3. PROVIDE RESPONSIVE CUSTOMER SERVICE

We understand that individuals, families, and business owners have choices about where to live, work, play, and invest. Lee's Summit's consistent, long-term growth has not occurred by accident; the community

has benefited from well-defined long-range planning, including Water Utilities' commitment to provide high-quality and efficient water services. We pledge to continue this legacy of reliable and responsive service.

- » **Water Utilities will proactively engage stakeholders on key issues and provide exceptional customer service through outreach, communication, and cooperation.**

4. DEVELOP THE UTILITY WORKFORCE

Water Utilities' workforce is committed, responsive, and well-trained. To maintain momentum, Water Utilities will continue to attract, develop, and retain a workforce that is skilled, resourceful, and committed to its goals.

- » **Water Utilities will deploy an effective and motivated workforce, focusing on clear communication, knowledge sharing, and career advancement opportunities.**

5. MAINTAIN FINANCIAL STABILITY

Maintaining high-quality service today and preparing for the growth and challenges of tomorrow requires sufficient resources. Water Utilities has made strides to develop a sustainable financial standing over the past decade. Its water and sewer rate structure must continue to be fair and equitable, rooted in an understanding of the challenges that our own customers face.

- » **Water Utilities will maximize value to ratepayers through good stewardship of financial resources that is based on a clear understanding of costs and equitable rate structures.**





4. OUR ACCOMPLISHMENTS & CHALLENGES

Drawing on momentum gained from the 2011 Strategic Plan, Water Utilities has made great strides in improving its management approach and operation and maintenance practices. Looking into the next decade and beyond, Water Utilities will focus on enhancing its customer service responsiveness, sustainability focus, community contribution, and positioning as an “employer of choice.”

4.1 ACCOMPLISHMENTS

CUSTOMER RELATIONS	FINANCIAL VIABILITY	OPERATIONS	HUMAN RESOURCES
<p>Improved the utility billing system to provide better, more detailed account information to customers.</p> <p>Promoted community engagement through enhanced customer education and communications.</p> <p>Promoted temporary hardship resources to provide short-term relief to qualified customers.</p> <p>Formalized a Customer Service division to improve the quality and consistency of service to customers, including the positions of:</p> <ul style="list-style-type: none"> Assistant Director of Customer Care Community Relations Specialist 	<p>Transitioned the former Water Tap Fee Committee to the current Water Utilities Advisory Board to provide broader input on Water Utilities planning, operations, and financial issues.</p> <p>Updated rates and fees methodology to improve equity based on usage and fixed and variable costs.</p> <p>Implemented a 5-year rate structure to make rates stable and predictable.</p> <p>Developed funding to support increased infrastructure renewal planning and projects.</p> <p>Developed long-term financial goals including elimination of debt.</p>	<p>Improved ability to assess the condition of pipes and other equipment to proactively address concerns.</p> <p>Improved operational effectiveness by replacing an obsolete and congested operations facility.</p> <p>Implemented a meter replacement program to ensure billing accuracy.</p> <p>Modernized Supervisory Control and Data Acquisition (SCADA) technology to automate manual processes and improve Water Utilities response.</p>	<p>Created new engineering positions and recruited team members with the skills necessary to support system and customer needs.</p> <p>Improved employee training programs to increase subject matter expertise and overall professionalism.</p> <p>Enhanced employee recognition programs.</p> <p>Developed new organizational positions to reflect increased expertise, including:</p> <ul style="list-style-type: none"> Operation Tech Utility Tech Billing Specialist Financial Services Manager Management Analyst

4.2 STRENGTHS

Water Utilities, working with its local water and wastewater provider partners, delivers a high-quality product, by many measures.

- » Reports demonstrate compliance with federal, state, and local regulations for drinking water.
- » Customer satisfaction with water and sanitary sewer service reliability remains high, with 96% of customers satisfied with both water and sanitary sewer service.
- » Main breaks have generally declined since 2019, with 2022 being an exception likely due to drought conditions.
- » Water Utilities employees feel that they do important work that makes effective use of their abilities. Employees also report that they receive the opportunities and training necessary to improve and to earn high performance ratings.
- » Employees feel that their supervisors are supportive and effective. Employees agreed that senior leadership at Water Utilities is effective and has a clear vision and strategy for the future.
- » Water Utilities' performance on nearly all financial metrics has improved since 2011. The City's average monthly water and sewer costs per household are reasonable in comparison to industry standards for affordability and remain among the lowest in the region.
- » Water Utilities' contracts for water supply and wastewater treatment capacity provide all the access needed for these crucial resources to sustain community growth for the foreseeable future.
- » Water Utilities engages with and educates community members and routinely relies on WUAB and stakeholder feedback to guide policy making.

4.3 OPPORTUNITIES FOR IMPROVEMENT

Water Utilities has identified opportunities to improve its operations and better achieve its goals.

- » Water Utilities' 2023 customer satisfaction survey indicates that there are opportunities for improvement in areas including communication on unplanned service disruptions, coordination of planning with customers for the future needs of the water and sewer system, and customer understanding of water and sewer rates in comparison to other regional providers.
- » Compared to industry benchmarks, Water Utilities is efficiently staffed. However, Water Utilities could benefit from increased staffing to meet current and future challenges.
- » Water Utilities could improve efforts to retain experienced staff.
- » The time taken to complete system repairs has increased slightly in recent years, likely due to coordination with other utilities and new guidelines for site restoration. However, there is always an opportunity to analyze and improve repair completion times so they are consistent with customer expectations.
- » Consistent with the priorities of the community's IGNITE! strategic plan, Water Utilities can improve its emphasis on energy efficiency and sustainable practices.
- » Water Utilities can increase infrastructure renewal planning and investment to address issues before they impact service.



5. OUR PLAN

5.1 MOVING FORWARD

Just as the 2011 Strategic Plan was a springboard for transformation, the findings from Water Utilities' 2023 Strategic Plan process will be used to identify priorities for the future. Specific areas of emphasis may include strengthening workforce development efforts to improve the size and capability of Water Utilities staff, addressing and improving customer satisfaction, investing in infrastructure renewal, and prioritizing operational optimization opportunities.

Water Utilities will also expand its monitoring of community water usage trends to be prepared to add additional supply, as needed. This means rightsizing to match both current and envisioned growth.

Water Utilities will focus on system fees and rates by comparing them to other community water systems in

the Kansas City metropolitan region. This analysis will result in rates that are equitable and affordable while also providing sufficient resources to develop, operate, and maintain a well-functioning system.

Finally, Water Utilities will continue to engage with City of Lee's Summit leadership, WUAB members, and other community stakeholders to better understand how it can evolve to meet future challenges.

5.2 THE ROADMAP

Water Utilities is committed to sharing with customers and stakeholders its plan for the next decade and beyond. Water Utilities leadership, WUAB, and other stakeholders will use this Strategic Plan to develop operational strategies and tactics that support identified goals. It will prioritize and program efforts to deliver results that demonstrate progress.



TEN ATTRIBUTES

- » **PRODUCT QUALITY** – Ensures purchased water from our supply partners is in full compliance with regulatory and reliability requirements and consistent with customer, public health and ecological needs.
- » **OPERATIONAL OPTIMIZATION** - Ensures ongoing, timely, cost-effective, reliable and sustainable performance improvements in all facets of its operations. Minimizes resource use, loss, and impacts from day-to-day operations. Maintains awareness of information and operational technology developments to anticipate and support timely adoption of improvements.
- » **RESILIENCY** - Ensures utility leadership and staff work together to anticipate and avoid problems. Proactively identifies, assesses, establishes tolerance levels for, and effectively manages a full range of business risks (including legal, regulatory, financial, environmental, safety, security and natural-disaster-related) in a proactive way consistent with industry trends and system reliability goals.
- » **INFRASTRUCTURE STABILITY** - Understands the condition of and costs associated with critical infrastructure assets. Maintains and enhances the condition of all assets over the long-term at the lowest possible life-cycle cost and acceptable risk consistent with customer, community, and regulator-supported service levels, and consistent with anticipated growth and system reliability goals. Ensures asset repair, rehabilitation and replacement efforts are coordinated within the community to minimize disruptions and other negative consequences.

- » **COMMUNITY SUSTAINABILITY** - Manages operations, infrastructure, and investments to protect, restore and enhance the natural environment; efficiently uses water and energy resources; promotes economic vitality; and engenders overall community improvement.
- » **WATER ADEQUACY** - Ensures water availability is consistent with current and future customer needs through long-term resource supply and demand analysis, conservation, and public education.

WATER UTILITIES GOALS

1. DELIVER INFRASTRUCTURE AND OPERATIONAL EXCELLENCE

2. PROMOTE COMMUNITY AND NATURAL RESOURCE SUSTAINABILITY

OPERATIONAL STRATEGIES

- 1.1. Protect and maintain water quality in accordance with State and Federal regulatory requirements.
- 1.2. Finalize implementation of replacement meters and develop a meter management policy for on-going renewal and management.
- 1.3. Proactively maintain assets to provide reliable distribution and delivery of drinking water.
- 1.4. Proactively maintain assets to provide reliable sewer collection and conveyance.
- 1.5. Complete APWA accreditation to improve professionalism and to enhance public trust.
- 1.6. Manage Water Utilities in a manner which maximizes continuity of service.
- 1.7. Utilize technology to enhance operational efficiency and level of service.
- 1.8. Align staffing requirements with level of service goals.
- 1.9. Invest in resiliency for key assets.

- 2.1. Maintain water supply and sewage treatment capacity with internal level of service goals.
- 2.2. Evaluate future service area expansion opportunities.
- 2.3. Conduct trending analysis of energy usage and find ways to reduce or offset consumption.
- 2.4. Track trends in annual water usage and loss.
- 2.5. Utilize alternative energy resources when economically beneficial.
- 2.6. Annually review available funding sources for applicability to Water Utilities projects.

TEN ATTRIBUTES

WATER UTILITIES GOALS

OPERATIONAL STRATEGIES

- » **STAKEHOLDER SUPPORT** - Engenders understanding and support from oversight bodies, community for service levels, rate structures, operating budgets, capital improvement programs, and risk management decisions. Actively involves stakeholders and community members in the decisions that will affect them.
- » **CUSTOMER SERVICE** - Provides reliable, responsive, and affordable services in line with explicit, customer-accepted service levels. Receives timely customer feedback to maintain responsiveness to customer needs and emergencies.

3. PROVIDE RESPONSIVE CUSTOMER SERVICE

- 3.1. Foster customer focused values throughout Water Utilities through enhanced organizational training.
- 3.2. Build trust within the community by engaging with customers.
- 3.3. Expand customer education on rate structure details and the rate setting process.
- 3.4. Partner with community stakeholder organizations and encourage staff involvement in order to cultivate collaborative partnerships and enhance public trust.

- » **EMPLOYEE & LEADERSHIP DEVELOPMENT** - Establishes a participatory, collaborative organization dedicated to continual learning and improvement. Ensures employee institutional knowledge is retained and improved upon over time. Provides a focus on and emphasizes opportunities for professional and leadership development and strives to create an integrated and well-coordinated senior leadership team.

4. DEVELOP THE UTILITY WORKFORCE

- 4.1. Minimize job vacancy and increase expertise by becoming an employer of choice.
- 4.2. Maintain and enhance employee satisfaction.
- 4.3. Provide a comprehensive approach to training and skill development that enables employee growth.
- 4.4. Conduct outreach to drive workforce recruitment and development.

- » **FINANCIAL VIABILITY** - Understands the full life-cycle cost of the utility and establishes and maintains an effective balance between long-term debt, asset values, operations and maintenance expenditures, and operating revenues. Establishes predictable rates — consistent with community expectations and acceptability — adequate to recover costs, provide for reserves, maintain support from bond rating agencies, and plan and invest for future needs.

5. MAINTAIN FINANCIAL STABILITY

- 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 the future.
- 5.2. Communicate and execute Water Utilities' budget to ensure alignment with strategic priorities.

While this Strategic Plan will undoubtedly evolve over the coming years, the work that goes into its development and implementation will continue to pay dividends for a long time to come. Organizations that plan for the future are those best equipped to deal with unforeseen challenges when they arise.




**RELIABLE.
SAFE.
ESSENTIAL.**



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LEE'S SUMMIT**

**LS WATER UTILITIES
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FRESH  LOCAL
WATER BAR
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OUR MISSION

Dedicated to providing re
water & sanitary sewer se
responsibly & efficiently
health & safety of our com
with exceptional custo
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**6.
ENGAGING
WITH YOU!**



Water Utilities has a compelling story to tell and is excited to do so! Its work is most often in the background or – quite literally – underground, but that doesn't make it any less important to the future growth, prosperity, and sustainability of Lee's Summit.

Water Utilities will continue to fulfill its crucial role as an anchor institution in the community by providing high-quality water and wastewater services that benefit the local economy, public health, environment, and overall well-being. Water Utilities will continue to provide civic leadership and participation on pressing issues, such as development and sustainability, that face our community - all with a focus on positioning Lee's Summit for an even brighter future.

Water Utilities is continuing to raise its visibility for the benefit of its customers, employees, and the community it serves, which means you'll be seeing and hearing more about your local water utility in the near future.

Water Utilities invites you to:

- » Visit us – at our helpful and engaging website to learn more about Water Utilities (cityofls.net)
- » Look for us – out in the community
- » Join us – we are looking for talented individuals committed to the welfare and sustainability of our community

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