



# Water Utilities Tactical Plan

City of Lee's Summit Water Utilities

*Lee's Summit, MO*  
September 2023





## Contents

I.	Introduction .....	2
A.	Overview .....	2
B.	Project Team .....	2
II.	Water Utilities' Strategic Priorities .....	3
A.	Mission, Vision, Values .....	3
B.	Water Utilities' Ten Attributes .....	3
C.	Goals .....	5
III.	Water Utilities' Tactical Plan .....	7
A.	Background Information .....	7
B.	Summary of Tactics .....	9

# I. Introduction

## A. Overview

This Tactical Plan is intended to complement the Lee's Summit Water Utilities' Strategic Plan and to serve the following purposes:

- Identify the project team responsible for the effort.
- Establish the foundation for the tactics, including Water Utilities' identified attributes, goals, and strategies.
- Specify the tactics, including the timing and accountability for accomplishment.

## B. Project Team

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

## II. Water Utilities' Strategic Priorities

### A. Mission, Vision, Values

#### 1. Mission

Lee's Summit Water Utilities (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.

#### 2. Vision

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

#### 3. 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.

### B. Water Utilities' Ten Attributes

The Ten Attributes are a comprehensive framework for measuring the effectiveness of water and wastewater utilities that was developed through a collaboration between industry water and wastewater associations, including the U.S. Environmental Protection Agency (US EPA), the American Public Works Association (APWA), and the American Water Works Association (AWWA). The Ten Attributes form the basis of the Effective Utility Management (EUM) framework and provide utilities with a means to assess, manage, and measure their performance with regards to operations, infrastructure, customer satisfaction, community sustainability, natural resource stewardship, and financial performance.

Water Utilities has taken the Ten Attributes and further refined them to fit the specifics of the Lee's Summit context. The Lee's Summit Water Utilities' Ten Attributes that direct the organization are:

- **Product Quality (Operations)** – 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 (Operations)** - 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 (Administration)** - 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 (Engineering)** - 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 (Engineering)** - 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 (Engineering)** - Ensures water availability is consistent with current and future customer needs through long-term resource supply and demand analysis, conservation, and public education.
- **Stakeholder Support (Business Services)** - 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 (Customer Care)** - 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.
- **Employee & Leadership Development (Customer Care)** - 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.
- **Financial Viability (Business Services)** - 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.

## C. Goals

Drawing from Water Utilities' mission, vision, and values as well as industry-wide professional standards and the Ten Attributes, Water Utilities identified the following goals for the next decade of our 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 benefitted from well-defined long-range planning, including Water Utilities' commitment to provide high-quality and efficient water service. We pledge to continue this legacy of reliable 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.**

## III. Water Utilities' Tactical Plan

Strategies and tactics are derived from the Water Utilities' Ten Attributes and Goals described in Section II and translate planning into execution. Strategies more precisely define how a goal is to be achieved, identifying a program or effort dedicated to a particular purpose that contributes to the goal. A tactic more precisely outlines how the strategy will be accomplished.

- An example of a strategy: *Develop and execute a wastewater management plan, driven by community expansion needs, that delivers safe, resilient, and reliable services a minimum of 6 months prior to development 98% of the time.*
- An example of an accompanying tactic: *Develop, execute, adapt, monitor, and support "new development" collection lines integrated with existing infrastructure for the future development of the 470/350 intersection area.*

This Tactical Plan connects the Water Utilities' commitments with the programs and daily work of its employees. It demonstrates how Water Utilities' employees' efforts support the fulfillment of the both the community's and organization's most strategic priorities. The Tactical Plan serves as a roadmap by which Water Utilities will organize and execute its responsibilities over the next decade.

### A. Background Information

The following sections explain the terminology and abbreviations used in the Summary of Tactics (Section B).

#### 1. Planning Period

The "Planning Period" time increment for each tactic is classified as follows:

- Long-Term = To be achieved within five to ten years
- Mid-Term = To be achieved within three to five years
- Short-Term = To be achieved within the next one to two years

The "Recurrence Frequency" for each tactic is classified as follows:

- B = Bi-annually (every other year)
- A = Annually
- S = Semi-annually (twice per year)
- Q = Quarterly
- M = Monthly
- BM = Bi-monthly (twice monthly)

#### 2. Other

Where "City Department Support" is indicated, the designated City Department is identified as:

- CS = Communications
- DS = Development Services



- IT = Information Technology Services
- Law = Law Department
- PW = Public Works

The “Requires External Support” column indicates when coordination is required outside of Water Utilities.

The “Division Lead” designations within Water Utilities are identified as:

- B = Business Services
- C = Customer Care
- D = Director
- E = Engineering
- OP = Operations
- F = Facilities

The “Educational Material Required (new, existing)” column indicates whether new or existing reference materials are anticipated to communicate a tactic to stakeholders.

The “Aligns with *IGNITE!* Elements” column abbreviations are:

- QL = Quality of Life
- SN = Strong Neighborhoods & Housing Choice
- RE = Resilient Economy
- PF = Public Facilities, Infrastructure, & Resiliency
- SE = Sustainable Environment
- LU = Land Use & Community Design

The *IGNITE!* plan is located here: [2019 Strategic Plan \(cityofls.net\)](https://www.cityofls.net/2019-Strategic-Plan)



## B. Summary of Tactics

1. <b><i>GOAL: Deliver Infrastructure and Operational Excellence</i></b>	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 IGNITE! Elements
<b><i>1.1. Protect and maintain water quality in accordance with State and Federal regulatory requirements.</i></b>									
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
1.1.6. Perform water main flushing and track residual chlorine in the distribution system.			X				OP, E		PF
1.1.7. Comply with US Environmental Protection Agency (US EPA) mandate concerning lead and copper in the drinking water system. 1.1.7.1. Provide information to customers about private water fixtures containing lead.			X		CS, Law	X	E, C, OP	X	PF, QL

<b>1. GOAL: Deliver Infrastructure and Operational Excellence</b>		<b>PLANNING PERIOD</b>				<b>OTHER</b>				
<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 IGNITE! Elements
	1.1.7.2. Complete initial Lead Service Line Inventory by 10/16/2024. 1.1.7.3. Remove and replace any lead service lines. 1.1.7.4. Review and update the City Code of Ordinances Article V. Lead Ban in Public and Private Drinking Water Plumbing based on the Lead and Copper Rule Revision. 1.1.7.5. Conduct lead service sampling in drinking water distribution system on a three-year rotation in accordance with US EPA requirements.									
<b>1.2. Finalize implementation of replacement meters and develop a meter management policy for on-going renewal and management.</b>										
	1.2.1. Install the remaining (approximately 25%) of replacement water meters.			X				C, OP		PF
	1.2.2. Develop a formal meter replacement policy.			X				D, OP		PF
	1.2.3. Review and update the City Code of Ordinances Sec. 32-65 Meter Tests and Test Fees.		X			Law		D		PF
	1.2.4. Implement a data management application integrated with the Automated Meter Reading (AMR) Program that allows for collection of data for use by Water Utilities.		X			IT		B		PF
<b>1.3. Proactively maintain assets to provide reliable distribution and delivery of drinking water.</b>										
	1.3.1. Continue CIP investment in anode retrofit program. Track and re-evaluate anode program investment levels with			X				E		PF



1. <b><i>GOAL: Deliver Infrastructure and Operational Excellence</i></b>	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 IGNITE! Elements
success rate of prolonging of assets annually (trend curve can be used to estimate the investment level resulting in cost-effective reduction in break rate).									
1.3.2.Document and execute maintenance programs in use for key operational assets such as: 1.3.2.1. Valve exercising program. 1.3.2.2. Hydrant testing program. 1.3.2.3. Water distribution integrity indicators. 1.3.2.4. Facilities.			X				OP, F		PF
1.3.3.Maintain an asset renewal rate of the water system that is between 1-2% annually.			X				E		PF, RE, LU
1.3.4.Define data to be collected about equipment failures and determine location for tracking documentation. (Refer to Facility Asset Management Plan (FAMP.))			X				OP		PF
<b><i>1.4. Proactively maintain assets to provide reliable sewer collection and conveyance.</i></b>									
1.4.1.Maintain capacity sewer overflows of less than 1.3 per 100 miles.			X				OP		PF, SE
1.4.2.Document sewer cleaning and televising program best practices and training materials. Establish goals for the program.			X				OP		PF, SE

1. <b><i>GOAL: Deliver Infrastructure and Operational Excellence</i></b>	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 IGNITE! Elements
1.4.3.Maintain a system renewal/replacement rate for the wastewater collection system in alignment with condition scores.			X				E		PF, RE, LU
1.4.4.Maintain a facility/equipment renewal/replacement rate in alignment with the Facilities Asset Master Plan.			X				E		PF, RE, LU
1.4.5.Proactively address Infiltration/Inflow (I/I) in accordance with the Wastewater Master Plan (WWMP) to preserve system capacity. 1.4.5.1. Develop flow metering program that achieves model updates, pre- and post- project data, basin planning, and supports I/I studies. 1.4.5.2. Evaluate the repair of private laterals located within the ROW.		X					E		PF, SE
<b><i>1.5. Complete APWA accreditation to improve professionalism and to enhance public trust.</i></b>									
1.5.1.Develop and implement a robust Standard Operating Procedures (SOP) program and database that incorporates an annual review with updates.			X				OP, F		PF
1.5.2.Update Continuity of Operations Plan annually.		X		A			OP, All		PF
1.5.3.Create departmental safety committee to consider opportunities to improve safety and to develop safety processes.			X				D, OP		PF, QL



1. <b><i>GOAL: Deliver Infrastructure and Operational Excellence</i></b>	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 IGNITE! Elements
1.5.4. Conduct monthly safety meetings combined with idea sessions.			X	M			OP, F		PF, QL
1.5.5. Conduct annual safety audits and implement changes identified by safety audits within one year.			X	A			OP, F		PF, QL
1.5.6. Create program for document management, including scanning existing documents into Laserfiche, and policies for future document digitization, to improve retention and access to documents.			X				D		PF
<b><i>1.6. Manage Water Utilities in a manner which maximizes continuity of service.</i></b>									
1.6.1. Document available on-call/emergency and other vendor contracts within nearby communities that align with needs.			X	A			B, D, E		PF
1.6.2. Identify potential mutual aid partners in nearby communities that could contribute to and benefit from a shared spare parts inventory. The intent of partnerships is to assist participating communities with emergency repairs and preferred vendor supplier information		X		A			D, OP		PF
1.6.3. Identify a frequency with which to update Security Audit Checklist Recommendations (Homeland Security Audit).		X					OP, All		PF
1.6.4. Review design and construction standards annually and update to current industry best practices or to address deficiencies noted in construction techniques and based on operation of the system.			X	A	PW		E		PF

1. <b><i>GOAL: Deliver Infrastructure and Operational Excellence</i></b>	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 IGNITE! Elements
1.6.5. Review and update Chapter 32 of the Lee's Summit Code of Ordinances.			X	A	Law		D, OP		PF
<b><i>1.7. Utilize technology to enhance operational efficiency and level of service.</i></b>									
1.7.1. Evaluate data analytic software to produce a dashboard capable of analyzing collection system temporary metering data and compare it to hydraulic model expected results (allows for identifying system changes or indicators of decline in Level of Service).		X				X	E		PF
1.7.2. Evaluate use of existing software platforms (CIS, CityWorks, Itron, GIS, hydraulic models for water/ sewer) to confirm that full functionality is being utilized.		X					E, OP, F, B, C		PF
1.7.3. Evaluate a tracking tool for activities that currently overlap with GIS, CIS, and CityWorks to properly resolve and update records in all datasets.	X				IT		B, OP, C		PF
<b><i>1.8. Align staffing requirements with level of service goals.</i></b>									
1.8.1. Annually track number of customer accounts per employee relative to the industry benchmark for the 75th-percentile of 631 customer accounts per employee.		X		A			B		PF
1.8.2. Update the Duty Supervisor Manual for the purposes of identifying efficiencies, inconsistencies, and gaps in training.			X	A			D, OP		PF



1. <b><i>GOAL: Deliver Infrastructure and Operational Excellence</i></b>	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)	<i>Aligns with IGNITE! Elements</i>
	1.8.3. Annually evaluate staffing levels by reviewing manhour requirements for standard operations.			X	A			B, D	
<b><i>1.9. Invest in resiliency for key assets.</i></b>									
1.9.1. Maintain a spare parts inventory including key assets and high Consequence of Failure (CoF) assets. Inventory should specify the required components or equipment required to renew or replace each of these assets.		X					F, OP		PF







<b>2. GOAL: Promote Community and Natural Resource Sustainability</b>		<b>PLANNING PERIOD</b>				<b>OTHER</b>				
<i>Strategy</i>	<i>Tactic</i>	Long-Term	Mid-Term	Short-Term	Recurrence Frequency	City Department Support	Requires External Support	Division Lead	Educational Material Required (new, existing)	Aligns with IGNITE! Elements
<b>2.3. Conduct trending analysis of energy usage and find ways to reduce or offset consumption.</b>										
	2.3.1. Conduct American Society of Heating, Refrigerating and Air-Conditioning Engineers (ASHRAE) Level 1 energy audits on high energy use facilities by 2024 and all facilities by 2025. Develop a schedule to complete subsequent ASHRAE Level 2 and 3 energy audits.			X				E, F		SE
	2.3.2. Identify high energy use facilities and collect trend data for long range analysis.		X					F		PF, SE
	2.3.3. Develop a Key Performance Indicator (KPI) program or tool related to Water Utilities facilities energy use.		X					E, D		PF, SE
<b>2.4. Track trends in annual water usage and loss.</b>										
	2.4.1. Develop a program for leak detection.			X				OP		PF, SE
	2.4.2. Compare community water usage current trends related to water scarcity or the need for evaluating water reuse in the local environment.	X						B, E		PF, SE
	2.4.3. Conduct AWWA Water Audit annually and identify metric(s) for improvement relative to the industry benchmark.			X	A			B		PF, SE
	2.4.4. Update Building Codes to require smart irrigation controllers and evaluate incentivizing the replacement of non-smart controllers.		X			DS, Law		D, B, E		SE, SN
<b>2.5. Utilize alternative energy resources when economically beneficial.</b>										
	2.5.1. Identify energy efficiency practices and technologies that may be appropriate for implementation at the Water Utilities.		X					E, OP		SE

2. <b><i>GOAL: Promote Community and Natural Resource Sustainability</i></b>	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)	<i>Aligns with IGNITE! Elements</i>
	<b><i>2.6. Annually review available funding sources for applicability to Water Utilities projects.</i></b>								
2.6.1. Understand and monitor environmental, social, and governance requisites for applicable funding mechanisms.			X	A			E		SE, PF
2.6.2. Show location of facilities relative to community demographics and update on some frequency to be prepared for funding opportunities that require Environmental Justice (EJ) metrics. Utilize EPA's EJ Screen Tool to identify disadvantaged communities by census tract.		X					E		SN, PF



<b>3. GOAL: Provide Responsive Customer Service</b>		<b>PLANNING PERIOD</b>				<b>OTHER</b>				
<i>Strategy</i>	<i>Tactic</i>	Long-Term	Mid-Term	Short-Term	Recurrence Frequency	City Department Support	Requires External Support	Division Lead	Educational Material Required (new, existing)	Aligns with IGNITE! Elements
<b>3.1. Foster customer focused values throughout Water Utilities through enhanced organizational training.</b>										
	3.1.1. Annually review opportunities to improve how essential information is shared with customers to improve public understanding of Water Utilities operations.		X		A	CS		C		PF, QL
	3.1.2. Develop language translation capabilities for public materials that match community demographics.			X				C		PF, QL
<b>3.2. Build trust within the community by engaging with customers.</b>										
	3.2.1. Track customer complaints to ensure timely follow-up and closure.		X					C		PF, QL
	3.2.2. Continue to conduct annual customer survey.			X	A			C		PF, QL
	3.2.3. Utilize social media and other outreach methods for contacting customers interactively, using transparency to demonstrate value.			X		CS		C		QL
	3.2.4. Develop tutorials to show consumers what Water Utilities workers do and how Water Utilities facilities work. Demonstrate staff quality.		X			CS		OP, C	X	PF, QL
	3.2.5. Provide proof of drinking water regulatory compliance (beyond the Consumer Confidence Report) to customers.		X					C	X	PF, QL
	3.2.6. Find opportunities to share statistics and fun facts about Water Utilities' assets and programs, including ways to interact differently with the public.			X		CS		C	X	QL
	3.2.7. Provide educational materials including: PFAS, completed projects, costs, financial audits, fees and charges, CCR, alternatives analysis, and explanation of major decisions based on value analysis.		X			CS		C, E, B	X	QL

3. <b><u>GOAL: Provide Responsive Customer Service</u></b>	PLANNING PERIOD				OTHER				
Strategy  Tactic	Long-Term	Mid-Term	Short-Term	Recurrence Frequency	City Department Support	Requires External Support	Division Lead	Educational Material Required (new, existing)	Aligns with IGNITE! Elements
	3.2.8.Utilize CIP Interactive Map to communicate completed, in process, and upcoming projects.			X		CS, PW		E	
3.2.9.Conduct annual review of payment assistance program utilization to gauge if a more robust low-income assistance program is warranted.		X		A			B		QL, RE
<b><i>3.3. Expand customer education on rate structure details and the rate setting process.</i></b>									
3.3.1.Through WUAB, solicit customer input during the development of rate changes.			X	A			B		QL, RE
3.3.2.Provide water and sewer rate information in the annual customer survey including a rate comparison to service providers in the surrounding area to demonstrate value of service.			X	A			B	X	QL, RE
3.3.3.Create a graphic for the Water Utilities website that communicates a simplified version of the water and sewer rate methodology.			X		IT		B	X	RE
<b><i>3.4. Partner with community stakeholder organizations and encourage staff involvement to cultivate collaborative partnerships and enhance public trust.</i></b>									
3.4.1.Create an annual community engagement plan that includes interactions with community partner organizations such as schools and other community groups.			X	A			D, C		PF, QL



4. <b>GOAL: Develop the Utility Workforce</b>	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 IGNITE! Elements
4.3.1. Annually review training offerings and identify whether additional offerings are warranted to achieve Water Utilities' goals.			X	A			D		QL, PF
4.3.2. Develop a mentoring program involving senior employees and less experienced staff to capture and convey institutional knowledge.		X					All		QL, PF
4.3.3. Institute monthly "lunch and learn" sessions that provide opportunities for employees to learn about best practices and innovative technologies to achieve Water Utilities' goals.			X	M			D, C		PF
4.3.4. Offer safety training topics bi-monthly. Provide incentives or recognition of key trainings to foster a safe work environment and inspire friendly competition amongst staff.			X	BM			E, OP, F		QL, PF
4.3.5. Continue and expand involvement in professional organizations by staff.		X					D		QL, PF
4.3.6. Evaluate procedural training to foster cohesive team atmosphere and to achieve staff buy-in on processes.		X					All		QL, PF
4.3.7. Establish framework or procedure for employee orientation and onboarding.			X				All		PF
<b>4.4. Conduct outreach to drive workforce recruitment and development.</b>									
4.4.1. Explore opportunities to develop talent pipelines with local and regional educational partners.		X					D, E, OP		PF
4.4.2. Engage with educational institutions and workforce development (training) businesses locally to define skillsets needed for Water Utilities' workforce and encourage them to funnel candidates to Water Utilities' target positions.		X					D, OP		PF









<b>5. GOAL: Maintain Financial Stability</b>		<b>PLANNING PERIOD</b>				<b>OTHER</b>				
<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 IGNITE! Elements
	5.2.5.Maintain administrative compliance for federal and/or state grants.		X					B		PF
	5.2.6.Prepare annual cost of service analysis for a 10-year period.			X	A			B		PF, RE
	5.2.7.Maintain inventory management by tracking parts, supplies, and equipment utilized by Water Utilities employees.			X	W			OP, B		PF
	5.2.8.Utilize technology (data analytics) to better communicate and display Water Utilities' financial health and reporting metrics.			X		IT		B, E		RE