



WATER UTILITIES
LEE'S SUMMIT

Annual Strategic Plan Update

Dom Bennett, Assistant Director of Customer Care



Purpose

- Provide an update on the progress of the strategic plan
- Review key achievements
- Review challenges
- Discuss any recommendations for adjustments or revisions



Annual Strategic Plan Review Process

Regulatory References: N/A	
Policy Number: 100.3	Date Created: 03/05/2024
Latest Revision: 03/05/2024	Next Review Date: 03/05/2027
Created By: Dom Bennett	
Director of Water Utilities Approval: <i>Mark Schaub</i> 3/28/24	

Purpose:

The department's goal is not just to fulfil customer expectations by providing exemplary service, but to also gain a deeper insight into conditions that have an impact on the departments mission while increasing productivity, reducing costs, and providing sustainable leadership. The Water Utility Strategic Planning Review Process reviews the existing strategic plan on an annual basis at the close of the fiscal year. This review is the process in which the WU management team will update the progress of the department's goals and objectives and will make any necessary adjustments that are necessary to be made.

Objective:

The review process ensures the document remains relevant, effective, and adaptable. This process ensures that a thorough review is completed annually and that an annual report is provided to the Water Utility Advisory Board. This report shall provide a thorough review of progress made over the previous year as well as any staff recommendations to change tactics or strategic goals.

Procedures:

As part of our planning process, it is important the department reviews the organizational mission, structure, operational capabilities and customer service efforts on a regular basis. This review process will occur at a minimum during the annual budgeting process with a final report summarizing strategic plan progress and any revisions that need to be made to the Water Utility Advisory Board by July 1st each year.

The process is as follows:

- Throughout the year, each Division Head shall monitor and record progress made towards their assigned goals and tactics. Additionally, they shall monitor established strategic plan timelines to ensure goals are achieved as stated within the plan.

- Should timelines need to be revised, each Division Head shall report the issue to the department director as soon as possible in order to agree upon an alternative schedule.
- No later than July 1st of each year, the Assistant Director of Customer Care shall notify each Division Head of the schedule necessary for submittals and meetings necessary to develop a thorough and complete report on the status of the Strategic Plan and present that report to the Water Utilities Advisory Board during the annual rate setting meeting.
- Prior to the annual WUAB meeting, staff shall report the status of completion, jointly review the overall progress and adapt as necessary to remain on schedule. During these meetings, the team will review the department's vision and mission statements and determine the overall departmental effectiveness at achieving its stated goals.
- The strategic plan and tactical plan will be reviewed as a team to check for any new opportunities or risks.
- All proposed changes will be evaluated and given final approval by the director. The AD of Customer Care shall finalize the progress report and submit it to the Director for review.
- After the annual report has been approved by the Director, the AD of Customer Care will ensure the report is included in the board packet and the presentation of the report placed on the appropriate WUAB agenda.

Recap of Strategic Plan

Mission Statement

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

Vision

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

Values

Integrity, Service, Reliability, Safety, and Pride





Goals of The Strategic Plan

- **Deliver infrastructure and Operational Excellence**
- **Promote Community and Natural Resource Sustainability**
- **Provide Responsive Customer Service**
- **Develop the Utility Workforce**
- **Maintain Financial Stability**

Let's Check our Performance
Against Strategic Objectives

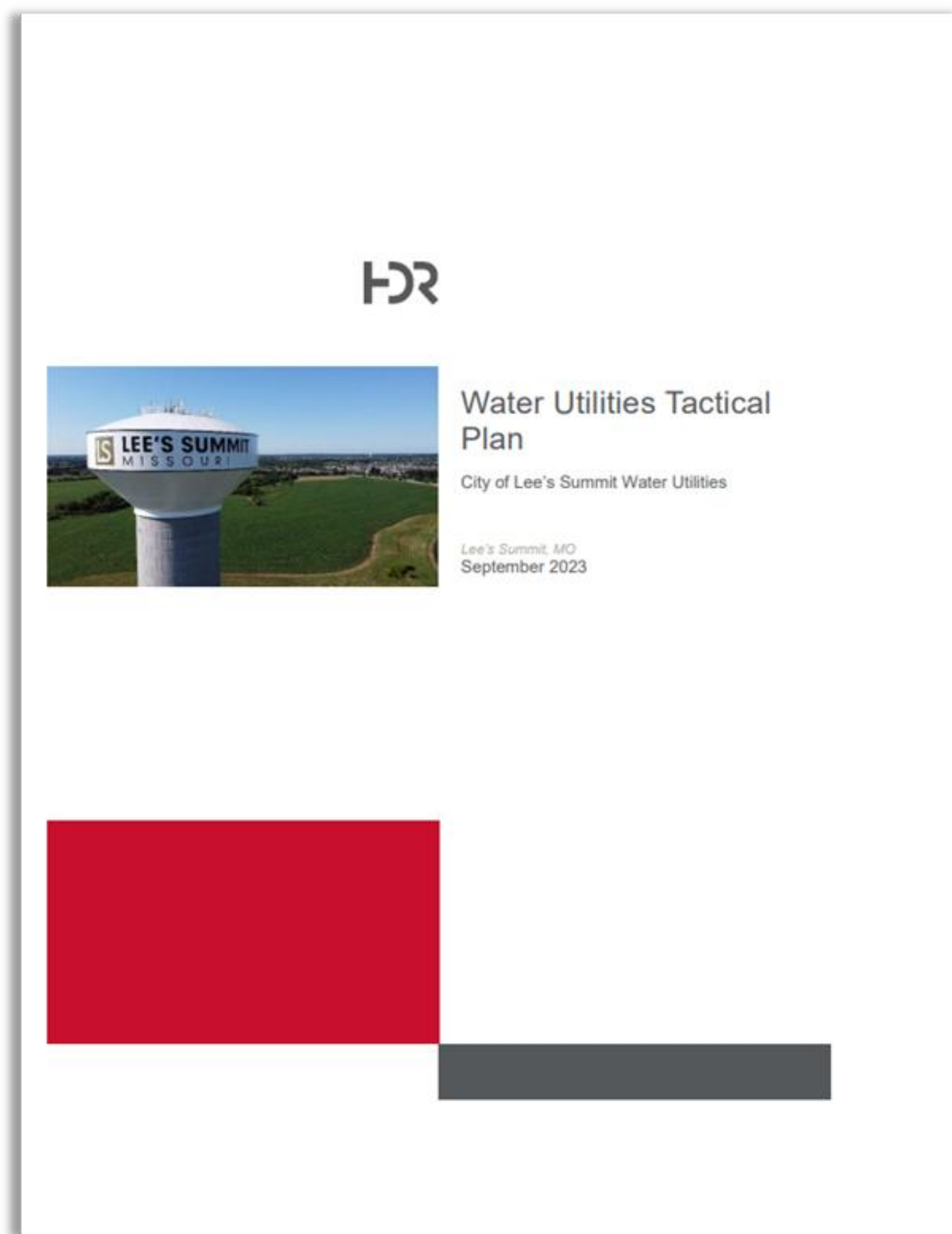


LSWU Tactical Plan

The tactical plan bridges the gap between the broad goals of the strategic plan and the practical, day-to-day actions needed to achieve those goals. It ensures that the utility can successfully implement its vision in a structured and manageable way, optimizing resource use, tracking progress, and adapting to challenges as they arise.

Key Components of a Tactical Plan:

- Specific Action Items: What needs to be done?
- Responsible Parties: Who is responsible for each task?
- Resources Needed: What resources are required?
- Timeline: When should each task be completed?
- Performance Metrics: How will success be measured?



SmartSheets

Water Utilities Strategic Plan Dashboard



Overview

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.

This Strategic Plan Tracker is intended to serve the following purposes:

- > Provide stakeholders with a better understanding of how Lee's Summit (Water Utilities) operates.
- > Impart the plan to address future challenges and drive continuous improvement

GOALS

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



WATER UTILITIES LEE'S SUMMIT



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Model Practices

Organization and Strategic Planning

1.4-Policies and Procedures

1.7-Relationship of the Agency's Strategic Plan to Government-Wide Planning Process

Human Resource Management

2.9-Workplace Conduct

2.13-Training Program

2.21-Orientation Process

2.32-Customer Service Training

Risk Management and Legal Review

5.9-Risk Management Reporting

Communication

6.5-Public Participation

6.8-Communication with Staff

Emergency Management

8.14-Restoration of Community Lifelines and Public Service

Drinking Water Distribution System

30.15-Public Education Program

2024 Lee's Summit Water Utility Survey Executive Summary



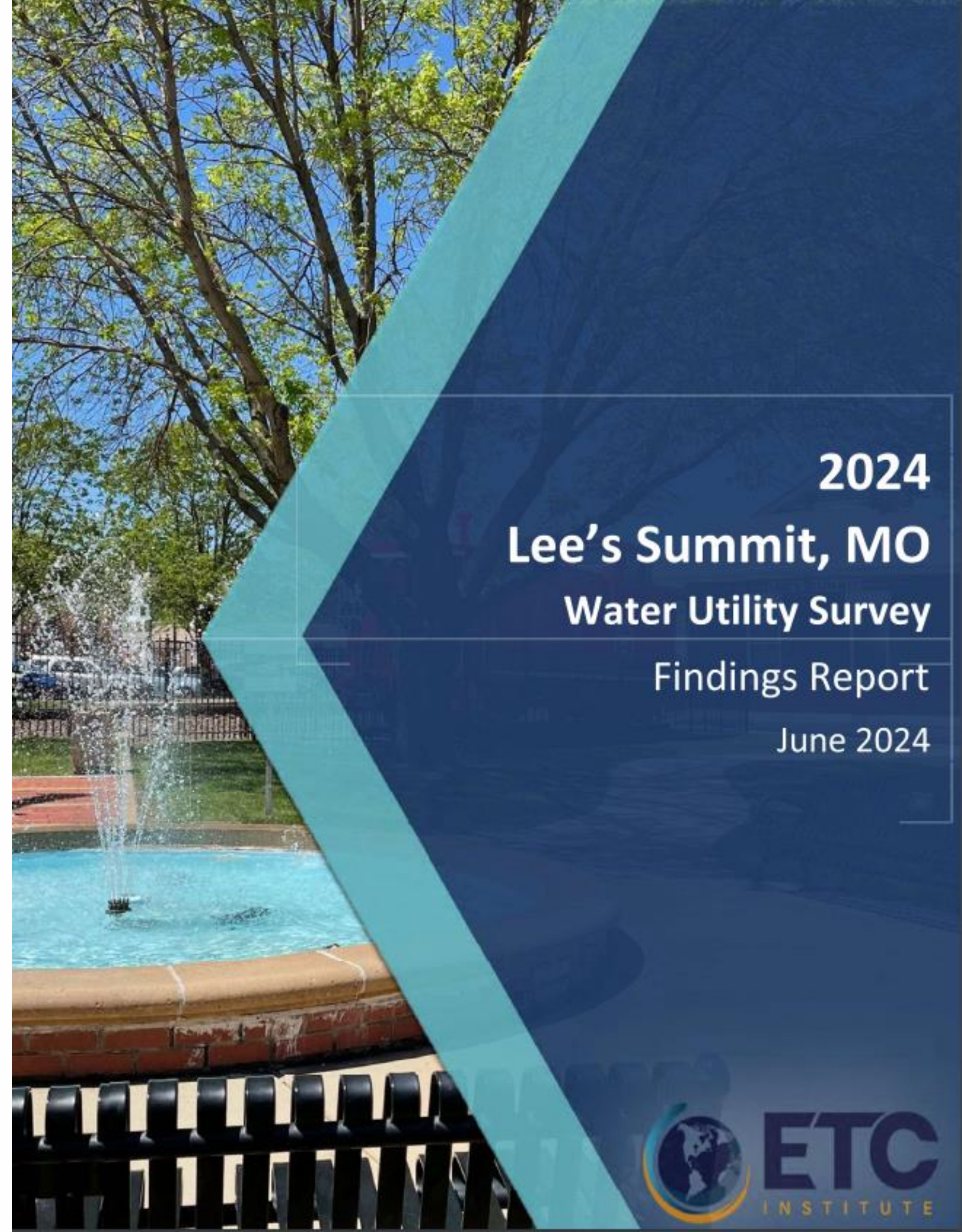
Purpose

ETC Institute administered a survey to residents of the City of Lee's Summit who receive water and sewer services from the Lee's Summit Water Utility during the spring of 2024. The purpose of the survey was to gather input regarding the quality of water and sewer services. This is the fifth survey administered for the Water Utility by ETC Institute; the first was conducted in 2010.

Methodology

The five-page survey, cover letter, and postage-paid return envelope were mailed to a random sample of households in the Water Utility's service area. The cover letter explained the purpose of the survey and encouraged residents to either return their survey by mail or complete the survey online. At the end of the online survey, residents were asked to enter their home address; this was done to ensure that only responses from residents who were part of the random sample were included in the final survey database. After the surveys were mailed, ETC Institute followed up with households that received the survey to encourage participation.

The goal was to obtain completed surveys from at least 400 residents. The goal was met, with a total of 415 residents completing the survey. The overall results for the sample of 415 households have a precision of at least +/-4.8% at the 95% level of confidence.



2024 Lee's Summit, MO Water Utility Survey

Findings Report

June 2024



Capital Investment Projects

Water Utilities invested \$16.5 million on design and construction projects in 2023.



McClendon Ditch Sewer Improvements

Spring 2023 – Summer 2024

This sanitary sewer improvement project includes upgrades to the sewer trunk main within the Cedar Creek watershed that serves the internal core of the City. The project will improve approximately 5,000 linear feet of sewer main and require a bore of U.S. Highway 50.



South Prairie Lee Interceptor Sewer Upgrades

Spring 2024 – Winter 2025

Key sections of the South Prairie Lee interceptor sewer will be upgraded to pave the way for development at the top of the drainage basin.



Water Main Cathodic Protection

Summer 2024 – Winter 2025

To safeguard the water supply and extend the life of the City's pipes, a corrosion protection system is being installed on a section of the water system showing signs of wear. This system uses special anodes to slow down pipe deterioration.



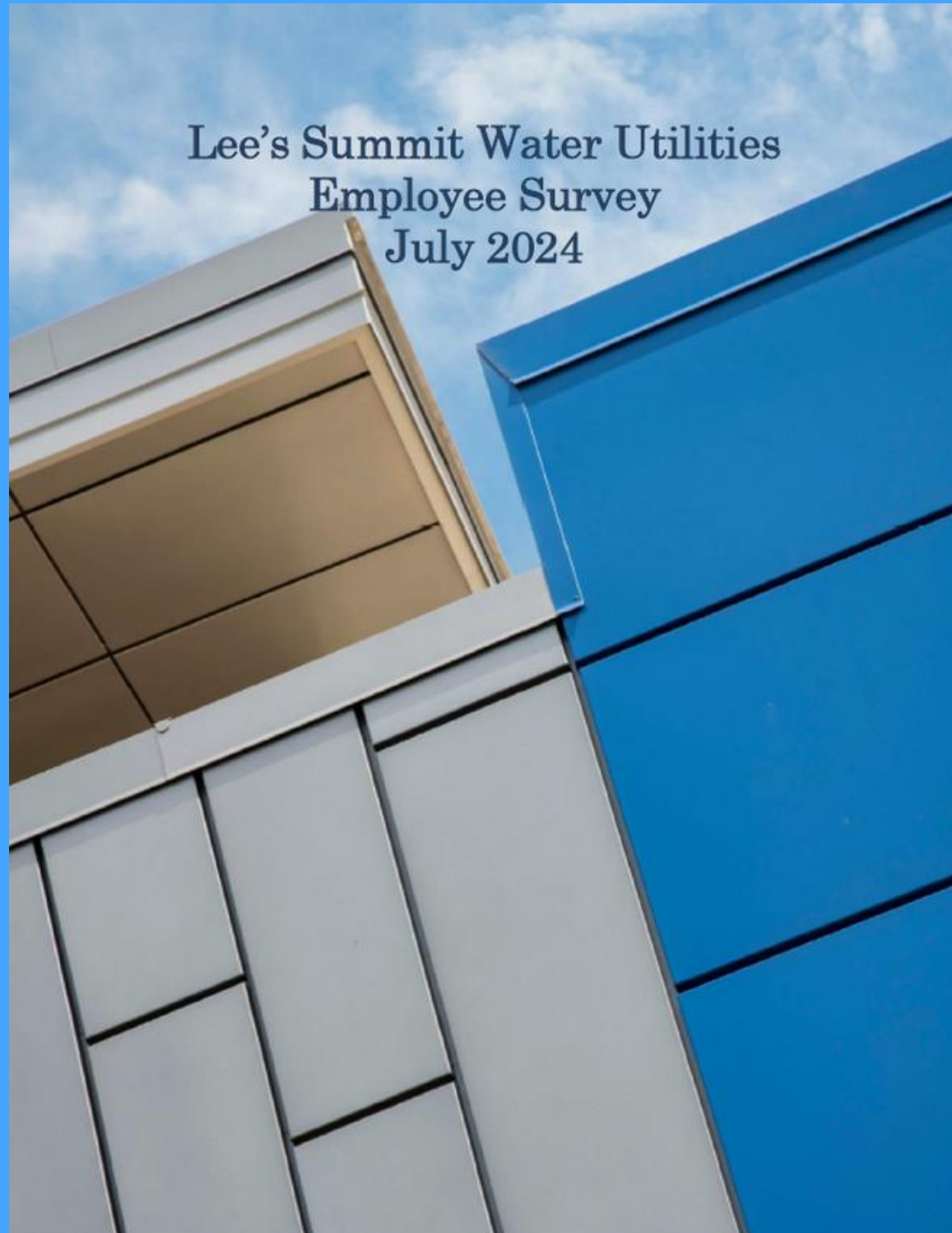
Water Main Rehabilitation

Spring 2024 – Summer 2025

Water Utilities is proactively upgrading water mains throughout the City that have a history of breaks to ensure reliable water delivery and minimize disruptions for residents and businesses.



2024 Employee Survey



2024 LSWU Employee Satisfaction Survey Summary Report

LSWU administered an employee survey for the employees of Lee's Summit Water Utilities during June of 2024. The survey was designed to assess overall satisfaction with employment at LSWU and to gather input from employees about issues in the following major areas:

- Equipment and Resources
- Communication
- Professional Development
- Leadership at LSWU
- Work Environment
- Employee Recognition
- Managerial Effectiveness

The survey was administered online via Survey Monkey for those employees with access to a computer. Paper surveys were provided for those employees without access to a computer. Participation in the survey was voluntary and employees were allowed to complete the survey during work hours. Of the 67 LSWU employees, 54 employees actually completed the survey, which was a response rate of 81%. Compared to the last survey completed in 2022, the response rate increased by 26%.