2021-2026 SPU Strategic Business Plan Reporting

April 17, 2020

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## SPU Current vs. Future State Reporting

### Current State

<table>
<thead>
<tr>
<th>SBP Service Delivery metrics</th>
<th>SBP Action Plans</th>
<th>SBP Council Deliverables</th>
<th>SPU MO Priorities</th>
<th>SBP Rate Path</th>
<th>SPU Financial Performance</th>
<th>SPU CIP Reporting</th>
</tr>
</thead>
</table>

### Future State

<table>
<thead>
<tr>
<th>SBP Service Delivery metrics</th>
<th>SBP Initiatives + Investments</th>
<th>SBP Rate Path and Affordability</th>
<th>SPU Financial Performance</th>
<th>SBP CIP Investment Portfolio</th>
</tr>
</thead>
</table>

Legend:
- **CRP**
- **MO/Council**
- **E-team**
Alignment - SBP Document with External Performance Reporting

A. Four SBP Focus Areas:

Delivering Essential Services – *reported by quarterly* Service Delivery Metrics

Stewarding Environment and Health

Empowering Our Community and Employees

Strengthening Business Excellence

B. SBP Rates and Financial Management

Rate Path: *reported annually* by Rate Path and Affordability metrics

Capital Investment: *reported quarterly* by CIP Investment portfolio
SBP Service Delivery Metric Reporting (Quarterly)

- 12 to 20 metrics overall to demonstrate delivery of reliable and responsive services to our customers:
  - 3 to 5 metrics per LOB/Service area
  - Aligned with LOB system plans

<table>
<thead>
<tr>
<th>#</th>
<th>Performance Metrics</th>
<th>Reporting Frequency</th>
<th>Target</th>
<th>2019 Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Customers rank their satisfaction with SPU services at least 5 on a scale of 1-7. (Last measured in 2015.)</td>
<td>Every 4 Years</td>
<td>≥5</td>
<td>5.9</td>
</tr>
<tr>
<td>2</td>
<td>% of priority drinking water, drainage, and wastewater problems responded to within one hour. (YTD)</td>
<td>Quarterly</td>
<td>≥90%</td>
<td>84%</td>
</tr>
<tr>
<td>3</td>
<td># of households enrolled in the Utility Discount Program.</td>
<td>Quarterly</td>
<td>NA</td>
<td>2,104 34,028</td>
</tr>
</tbody>
</table>
  - Change since January 1
  - 2019 year-end goal: 32,924
SBP Initiatives + Investments Reporting (Quarterly to Annually)

• 15 to 20 initiatives and investments selected overall to demonstrate *impacts and progress* related to SPU Focus Area goals and objectives.

• List may be adjusted annually as initiatives and investments are completed, targets are reached and/or new ones emerge.

• More granular level reporting will occur at CRP, highlighting investments and initiatives details.
# SBP Initiative + Investment Reporting Examples

<table>
<thead>
<tr>
<th>SBP Focus Area</th>
<th>Initiatives and Investments</th>
<th>Commitments</th>
<th>LOB/Branch</th>
</tr>
</thead>
</table>
| **Stewarding the Environment and Health** | Water System Climate Adaptation  
Waste Prevention  
Waste Diversion  
Green Stormwater Infrastructure | Under development           | Water  
SW  
SW  
DWW |
| **Empowering Our Communities and Employees** | Clean Cities Program  
Customer Assistance Programs (includes Side Sewer Pilot)  
Race and Social Justice Strategic Plan  
Workspace Facility Improvements: North Ops complex, Complete South Ops complex, Cedar Falls Phase 2, SMT | Under development           | SW  
Shared  
GM  
Water/  
DWW |
| **Strengthening Business Excellence** | DWW Asset Management - sewer rehab, drainage work, pump station rehab, combined sewer outfall commitments  
Water Asset Management/Opportunity Projects – seismic, distribution system maintenance, asset mgmt./aging infrastructure, opportunity projects  
Accountability & Affordability Plan | Under development           | DWW  
Water  
Shared |
SBP Rate Path and Affordability Metric (Annually)

- Rate path reflected as what was adopted, initially and currently proposed.

- Affordability will be reflected by community indicators developed by Raftelis, for example household burden.

![Graph showing 2021-2026 rate growth projections.]

**HOUSEHOLD BURDEN**

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>2020</td>
<td>6.4%</td>
</tr>
<tr>
<td>2031</td>
<td>10.7%</td>
</tr>
</tbody>
</table>

2020 Household Burden: 6.4%

2031 Household Burden: 10.7%
SBP CIP Investment Portfolio Reporting (Quarterly)

- Report phase progress on agreed upon number of SPU Capital Improvement Projects
- Investment $/# projects in various stages of planning and design, bid/award, and completion
SBP Performance Reporting Summary

In addition to service delivery metrics and Initiatives & Investments reporting, we will provide a summary of progress in each focus area:

• Progress will be demonstrated through a rolled up composite indicator:

  - Delivering Essential Services: 90% of performance indicators meeting targets
  - Stewarding Environment and Health: 95% of initiatives and investments on track
  - Empowering Our Community and Employees: 92% of initiatives and investments on track
  - Strengthening Business Excellence: 91% of initiatives and investment on track

• Additional visibility can be provided through quarterly presentations highlighting each focus area along with other work aligned with objectives and goals of SBP.
Next Steps

• Finalize the list of Initiatives and Investments internally
• Develop service level metrics
• Review the proposal with CRP

Questions?