## SPU Strategic Business Plan 2018-2023 Update

### Customer Review Panel Work Plan

<table>
<thead>
<tr>
<th>Meeting</th>
<th>SPB Update Topics</th>
<th>Deliverable/Outcome</th>
<th>Materials</th>
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</thead>
</table>
| 9/28    | 1) Welcome and Introductions  
          2) Goals of the SBP Update and Role of Panel  
          3) Workplan Review  
          4) Panel Ground Rules and Charter  
          5) SPU Overview  
          6) SBP Overview (where we are, challenges, where we are headed)  
          7) Corporate Functions Overview | • Provide foundational knowledge for ongoing Panel work.  
                                        • Clarity around Update vs New SBP.  
                                        • Draft charter and develop ground rules.  
                                        • Provide foundational background on SPU and corporate functions. | • CRP Notebook  
                                        • Various administrative documents  
                                        • SPU 2015-2020 SBP  
                                        • Learning Materials |
| 10/12   | 1) Approve Panel Charter  
          2) Nominate chair and co-chair  
          3) Water Overview  
          4) Drainage and Wastewater Overview  
          5) Solid Waste Overview  
          6) 2015 Employee Survey  
          7) 2016 Customer Focus Groups | • Final Charter and named chair and co-chair.  
                                        • Provide summary of what we've heard from our employees and customers.  
                                        • Provide foundational background on LOBs. | • CRP Notebook  
                                        • Learning documents  
                                        • Panel Charter  
                                        • Financial Documents |
| 10/26   | 1) Futuring and SWOC  
          2) Current status of 2015-2020 SBP (Action Plans, Efficiencies, Quarterly Report and Rate Path)  
          3) Baseline Part 1 (Financial Overview, Financial Assumptions)  
          4) Logistics: CRP Photos for Website | • Baseline concepts introduced.  
                                        • Provide foundational knowledge for future financial conversations.  
                                        • Understanding of 2015-2020 Action Plans/Efficiencies, set context for 2018-2023 New Investments/Savings. | • CRP notebook  
                                        • Learning Documents |
| 11/9    | 1. Baseline Part 1 Recap  
          2. Baseline Part 2 (Adjustments)  
          3. Service Equity  
          4. (Possibly Teeing Up New Investments and Savings) | • Further develop understanding and implications of baseline and adjustments.  
                                        • Begin conversation to integrate service equity in the SPB update | • CRP Notebook  
                                        • Learning Documents |
<p>| 11/30   | | | |
| 12/14   | | | |
| 1/11    | | | |
| 1/25    | | | |
| 2/8?    | *Meeting date may be adjusted | | |</p>
<table>
<thead>
<tr>
<th>Date</th>
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<td>TBD</td>
<td>Final Panel Event</td>
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**Items to be Covered November through May**

- SPB New Investments
- SPB Savings
- Customer Outreach Plans and Approach
- Employee Engagement
- Proposed Rate Path
- Metrics (including Service Levels)
- Equity Toolkit
- Draft Plan Update
- Panel Comment Letter