



MOUNT PLEASANT WATERWORKS **STRATEGIC PLAN 2018**



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MESSAGE FROM THE GENERAL MANAGER

IT HAS BEEN A GREAT PLEASURE TO WORK WITH THE BOARD OF COMMISSIONERS, STAFF, AND VARIOUS STAKEHOLDERS TO EXAMINE OUR STRENGTHS, OPPORTUNITIES, ASPIRATIONS, AND RESULTS, AND TO UPDATE OUR OVERALL STRATEGIC DIRECTION. THIS WILL ENSURE THAT WE REMAIN ACCOUNTABLE TO OUR RATEPAYERS AND MEET THE CHALLENGES AHEAD.

The Strategic Plan is a blueprint for excellence in service, technology, innovation, and environmental sustainability. The services we provide are vital to every person and business in our service area. It is our priority to prepare for challenges by developing solutions for today and the future.

At Mount Pleasant Waterworks, we will utilize the Strategic Plan as a clear vision for efficient and effective performance, financial responsibility, outreach, and leadership. It will make us leaders in our industry in the areas of customer service, technology, environmental protection, and business. I look forward to the steps we will take together and the impact in making sure that every dollar from our ratepayers goes farther, while improving our services to our customers, our town, and the environment.

A handwritten signature in black ink that reads "Clay Duffie". The signature is written in a cursive, flowing style.

Clay Duffie
General Manager



MESSAGE FROM THE COMMISSION CHAIR

The Board of Commissioners and staff have collaborated to assess key industry trends and community needs, and to identify the critical factors important to Mount Pleasant Waterworks' long-term success. We have a strong course of action, with clear goals, strategies, and objectives that will guide Mount Pleasant Waterworks' progress for years to come.

I look forward to working with the General Manager and staff to ensure Mount Pleasant Waterworks reaches its full potential.

A handwritten signature in black ink, appearing to read "Rick M. Crosby". The signature is stylized with a large, prominent "R" and a series of connected, slightly wavy lines for the rest of the name.

Rick M. Crosby
Commission Chair

MOUNT PLEASANT WATERWORKS IS MOVING INTO A PERIOD OF CHALLENGES AND OPPORTUNITIES THAT WILL BE DIFFICULT TO NAVIGATE WITHOUT CAREFUL PLANNING AND A CLEAR VISION FOR THE FUTURE. THAT VISION IS SUMMARIZED IN THIS DOCUMENT.



Mount Pleasant Waterworks Commissioners
Front row L to R - John Burn, Rick Crosby, Will Haynie
Back row L to R - Mac Jenkinson, Susan Mellichamp, Diane Lauritsen, Joe Bustos

INTRODUCT

OVERVIEW

Building on a legacy of successful strategic planning, including a comprehensive strategic plan in 2012 and a plan update in 2014, Mount Pleasant Waterworks (MPW) initiated a process to establish an updated vision and mission and a framework for guiding the organization toward achievement of its ultimate goals. This process was driven by the Commission and the MPW leadership team, and included opportunities for employees and external stakeholders to contribute their thoughts to the planning efforts. The strategic framework presented in this document will help guide organizational decision making and resource allocations for the next five years.

PROCESS

The MPW strategic planning process was designed to establish:

- A shared vision of the organization's goals and desired future state
- Acceptance of the direction and importance of the Strategic Plan for achieving MPW's goals
- A collective understanding of the resource needs, commitments, working environment, and principles upon which progress will be based

To achieve these conditions for success, MPW's strategic planning process involved input from a broad group of internal and external stakeholders through the following key tasks:

Strategic Plan Progress Review:

Evaluated the accomplishments since the last update and determined those strategies that require additional attention during the next several years.

Stakeholder Engagement:

Obtained input and insight from key stakeholders and involved them in the process to encourage their support for the resulting strategic plan. Utilized "WaterOpolis," a distinctive stakeholder engagement tool that helped the Commission, selected employees, and community stakeholders openly discuss issues and choices regarding MPW operations.

Commission Workshop:

Developed the fundamental elements of the MPW Strategic Plan (vision, values, mission).

Management Strategic Planning Workshop:

Drafted the updated strategic framework, including a review of the Commission input and the development of the draft vision, values, mission, goals, strategic measures, strategies, and objectives.

Commission and Senior Staff Workshop:

Finalized the 2018 MPW Strategic Plan and discussed implementation issues.

VISION

PROGRESS SINCE 2014 STRATEGIC PLAN UPDATE

A review of MPW's accomplishments since the 2014 strategic plan update indicated that:

- Progress was made on every strategy included in the previous plan. Some strategies are complete and need not be replicated in the updated plan, some need to be revised to reflect the current and anticipated operating environment, while others need continued attention, but not revision.
- Most of the Strategic Measures were met. Upon review, it was determined that some need to be more challenging, some need to be revised to be more meaningful, and some should not be included in the updated strategic plan.

In summary, the MPW Leadership Team believes that the 2012 Strategic Plan and the 2014 update were successful and have enhanced MPW's performance and position as a leader in the community and industry.

ENVIRONMENTAL SCAN

OVER THE LAST 20 YEARS,
MOUNT PLEASANT HAS
EVOLVED FROM A SMALL
TOWN OF JUST OVER 6,000
RESIDENTS TO A LARGELY
AFFLUENT, PROFESSIONAL,
URBAN COMMUNITY WITH AN
ESTIMATED POPULATION OF
84,000 PEOPLE IN 2016.

As part of the strategic planning process, MPW conducted an Environmental Scan to document its current operating environment and industry trends influencing how the organization conducts business. The scan considered local and regional demographics while identifying key issues, challenges and industry trends that will have a significant impact on MPW's ability to successfully meet the evolving needs of the service area.

The results of the Environmental Scan are summarized on the following pages. The information gained through the scan was used to form the basis of this strategic plan.

COMMUNITY PROFILE

Mount Pleasant is currently the fourth largest city in South Carolina, located in Charleston County on the east side of Charleston Harbor. In 2018, the Town of Mount Pleasant won a national competition to be named an All-America City by the National Civic League. There are a number of recreational and historic facilities located in Mount Pleasant, including the Patriot's Point Naval and Maritime Museum, as well as the Old Village Historic District. The Arthur Ravenel Bridge, which opened in 2005 and spans the Cooper River to connect Mount Pleasant with Charleston, is one of the longest cable-stayed bridges in the western hemisphere. Residents and visitors to the area now have easy access to beaches on two barrier islands, Isle of Palms and Sullivan's Island.

As of December 2016, the unemployment rate in Mount Pleasant was only 3.7%. This compares favorably to the unemployment rates in South Carolina (4.6%) and the United States as a whole (5.2%). The estimated median household income in Mount Pleasant is \$77,262. This indicates the affluence of the area, particularly when compared to the median household income in the US, which is \$53,482. However, the cost of living in Mount Pleasant is 37.5% higher than the United States median.

The leading industries in Mount Pleasant and the surrounding areas are healthcare and social assistance professional; scientific and technical services; accommodation and food services; and retail trade. Some of the largest employers in Charleston County include US Military Joint Base Charleston, Medical University of South Carolina, Boeing, and Roper St. Francis Healthcare. Long-term prospects for growth in the Mount Pleasant community and surrounding areas are excellent.

Mount Pleasant Waterworks provides drinking water and wastewater services to residents of the Town of Mount Pleasant and some surrounding areas. MPW has been on a strong financial trajectory: in 2013, Standard and Poor's upgraded the utility's rating to AA+, and in 2015, Moody's upgraded it to Aa1. These ratings were reaffirmed by the two credit rating agencies in 2017. MPW and its employees are recipients of a number of accolades from the water and government industry groups including the Certificate of Achievement for Excellence in Financial Reporting and the Distinguished Budget Presentation, awarded by the Government Finance Officers Association of the United States and Canada. The South Carolina Department of Health and Environmental Control (DHEC) Facility Excellence Award was awarded to both wastewater treatment plants. Additionally, MPW was listed for three years as one of the *Top 25 Best Places to Work in South Carolina* by SC Biz News and the SC Chamber of Commerce.

	MOUNT PLEASANT, SC	SOUTH CAROLINA	UNITED STATES
Median Household Income	\$77,262	\$45,033	\$53,482
Cost of Living Index*	137.5	92.6	100
Unemployment Rate	3.7%	4.6%	5.2%

*Cost of living index is based on a US average of 100. An amount below 100 indicates below-average cost of living, while an amount above 100 indicates an above-average cost of living. (Source: Sperling's Best Places, www.bestplaces.net)

TRENDS

MPW'S WATER AND WASTEWATER SERVICES ARE CRITICAL TO THE SUSTAINED VITALITY OF THE SERVICE AREA.

To ensure continued success, MPW's leadership reviewed a series of industry trends that must be considered as the organization plans for its future. Trends were considered in terms of:

- Changes since the 2014 update
- Expectations for the future
- Potential MPW actions relating to the respective trends





01

POPULATION

CHANGES SINCE 2014

- Population is growing more rapidly than expected (the 4.2% increase since 2014 has resulted in an additional 10,000 people)
- Water customers have grown by 3%, resulting in increased demand despite declines in per capita water use

EXPECTATIONS FOR THE FUTURE

- Continued substantial growth in population and customers is expected
- MPW will face pressure to serve customers beyond the existing infrastructure

MPW ACTIONS

- Continue to add capacity, buildings, and staff to meet expected demand
- Assure that expected growth is considered in all Capital Improvement Program (CIP) projects
- Continue and enhance a focus on technology and innovation
- Explore and, if appropriate, implement innovations in water treatment

02

POLITICAL ENVIRONMENT

CHANGES SINCE 2014

- Increased citizen engagement
- New Town Council (new Water Supply Chair and new Mayor)
- Withdrawal permit request and aquifer demands have created capacity issues

EXPECTATIONS FOR THE FUTURE

- There will be additional economic development and growth management issues that, along with road improvements, will affect the water and wastewater systems, water quality initiatives, supply, and capacity utilization

MPW ACTIONS

- Increase communications, build advocates, and increase stakeholder involvement
- Focus on meeting demand with new people, facilities and improvements
- Adjust funding plan to align with the Town's Growth Management Plan

03

REGULATIONS

CHANGES SINCE 2014

- A new federal administration is impacting Environmental Protection Agency (EPA) regulations, shifting to more “common sense” regulations with a greater focus on the state, rather than federal, responsibility
- Expanded stormwater regulations will impact construction projects

EXPECTATIONS FOR THE FUTURE

- Larger easements will be required
- Longer lead times for approvals and higher costs for projects

MPW ACTIONS

- Continue to monitor and respond to the regulatory environment
- Assure constant communication at the local and state level
- Provide internal training and ensure awareness of changes
- Update standards and specifications to be current with regulatory changes
- Obtain land necessary for larger easements and new facilities
- Increase funding to meet higher construction costs



04

WORKFORCE ISSUES

CHANGES SINCE 2014

- MPW has implemented many workforce-related improvements including:
 - » Conducted workforce analysis
 - » Conducted an organizational realignment and reorganized staff
 - » Attracted a larger staff to meet increased demand
 - » Began succession planning to address aging workforce
 - » Increased training and cross training
 - » Conducted a comprehensive Wage/Compensation Study
- Increased competition from manufacturing companies for some positions

EXPECTATIONS FOR THE FUTURE

- Increased difficulty in attracting workers due to limited availability of skilled applicants
- Increased competition for employees
- Lack of education relating to mechanical positions
- Higher cost of living in the region

MPW ACTIONS

- Expand the visibility of recruiting advertisements
- Reach out to local and regional community colleges to develop educational programs
- Develop relationships with veterans' organizations
- Promote MPW's position as one of the *Best Places to Work* in South Carolina for three years in a row
- Maintain competitive compensation by conducting formal wage/compensation studies





PROMOTE MPW'S
POSITION AS ONE OF
THE *BEST PLACES
TO WORK* IN SOUTH
CAROLINA FOR THREE
YEARS IN A ROW.



05

TECHNOLOGY

CHANGES SINCE 2014

- MPW is implementing Advanced Metering Infrastructure (AMI), an architecture for automated, two-way communication between a smart utility meter and MPW
- Maximo asset management system has started to mature
- Cloud-based system for billing/online payments and other billing improvements have been implemented
- Other technology, including SCADA to Cell, Office 365, and solar technology has been put in place
- Leveraged social media
- Increased telecommuting opportunities

EXPECTATIONS FOR THE FUTURE

- Greater emphasis on cloud services
- Increased and improved data analytics will be necessary
- System integration will be vital to optimizing operations
- Customer expectations for online services will increase
- Mobile applications will become more important
- The workforce will continue to become more technologically savvy

MPW ACTIONS

- Evaluate the existing Customer Information System (CIS)
- Implement network improvements for security/performance/reliability/surveillance
- Use business cases to evaluate technology alternatives
- Increase training to support new technology
- Explore technology for operational innovation such as direct and indirect water reuse, aquifer recharge, control of non-revenue water, and our I&I abatement.



06

CUSTOMER EXPECTATIONS

CHANGES SINCE 2014

- The number of customers served by MPW has increased
- Experienced a water quality incident in 2017, which increased customer interest in water quality and expectations for testing
- MPW has taken a number of actions to better meet the needs of its customers, including:
 - » Implemented the customer care program
 - » Increased social media usage
 - » Enhanced ability to communicate usage changes with customers utilizing AMI
 - » Initiated a Citizens' Water Academy
 - » Improved the Online Account Management System by changing to a new cloud based platform that offers more options and features than the previous system
 - » Started an evaluation of the Customer Information System and Billing Software to research and analyze the current system and options available for systems in the future

EXPECTATIONS FOR THE FUTURE

- Customer demand for effective communications will increase
- Customer demand for improved customer service, especially as related to technology, will increase
- Desire for quicker response times related to field, emergency, and service responses
- Continued desire for low rates
- More millennial customers and people moving to the service area from other places may shift customer desires and expectations

MPW ACTIONS

- Increase and improve customer communication activities
- Implement consistent and effective stakeholder engagement activities
- Continue to increase and improve social media presence
- Further develop the Citizens' Water Academy
- Enhance and improve customer experience with technology and data
- Develop the AMI Customer Portal
- Increase Customer Service Training
- Develop a comprehensive customer feedback plan and reporting system

07

TOTAL WATER MANAGEMENT

CHANGES SINCE 2014

- Since 2014, MPW has:
 - » Signed a new contract with Charleston Water
 - » Initiated discussions with Google regarding aquifer withdrawals
 - » Initiated an evaluation of treatment assets with an asset class engineer
 - » Improved accounting for lost water
 - » Developed groundwater management plans
 - » Engaged with the United States Geological Survey (USGS) to study future groundwater use
 - » Completed the Water Supply Master Plan

EXPECTATIONS FOR THE FUTURE

- Water source will become more strained
- Increased water and wastewater infrastructure will be required to meet demand

MPW ACTIONS

- Implement the Water Supply Master Plan
- Improve deep well infrastructure
- Assess facilities for replacement or expansion
- Recharge resources with treated wastewater
- Implement efforts to continue to reduce inflow and infiltration
- Develop approaches to improve quality and to blend water

08

FINANCIAL CONSTRAINTS

CHANGES SINCE 2014

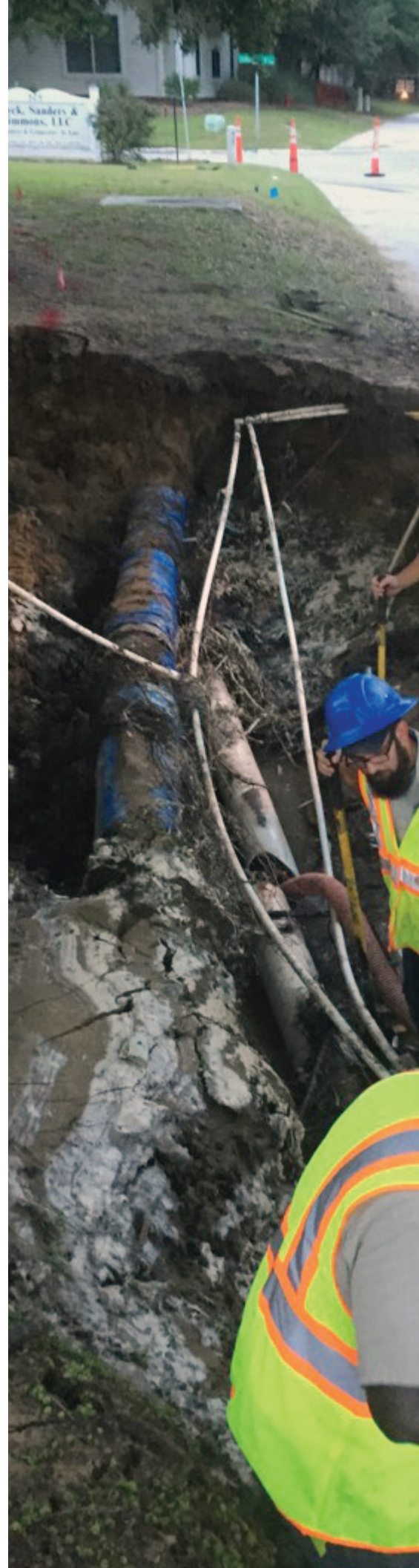
- MPW has experienced:
 - » Continuous increase in cost of doing business
 - » Unexpected road widening projects
 - » Increased demand for infrastructure
 - » Aging assets
 - » Increased personnel costs

EXPECTATIONS FOR THE FUTURE

- More capital projects will be required
- Residential equivalent policy changes for commercial customers are expected
- Regulations will continue to increase

MPW ACTIONS

- Update MPW's Cost Recovery Policy
- Improve stakeholder communication plans
- Work to "right-size" assets
- Continue and enhance asset management and strategic planning efforts
- Pursue funding from outside sources for utility line relocations due to road improvements



09

ENERGY

CHANGES SINCE 2014

- Energy costs are continuing to increase
- MPW has installed solar panels and researched other energy-saving options

EXPECTATIONS FOR THE FUTURE

- Continued cost increases
- Dramatic changes are not expected

MPW ACTIONS

- Continue to explore energy reduction and cost-saving opportunities



10

INCREASED RISK PROFILE

CHANGES SINCE 2014

- Increased risk of cyber-attacks
- Natural disasters are becoming more severe and frequent
- Violence and terrorism are increasing worldwide
- Loss of water from Charleston Water System is a risk outside of MPW's control
- Increased demand for public awareness relative to unregulated compounds

EXPECTATIONS FOR THE FUTURE

- Increasing number and severity of risks

MPW ACTIONS

- Increase knowledge and preparation for cybersecurity and implement more comprehensive strategies
- Continue developing policies, training, and plans for emergency management and security
- Identify and mitigate the safety and security threats through facility improvements and surveillance
- Improve interconnectability with adjacent systems
- Increase employee emergency response training
- Maintain close relationship with the Fire Department and Police Department

STRENGTHS, OPPORTUNITIES, ASPIRATIONS, & RESULTS

To help form the foundation for the updated Strategic Plan, the MPW Commissioners and Management Team identified their collective view of the utility’s strengths, opportunities for improvement, aspirations for the future, and desired results. These are summarized below and are embedded in the updated MPW Strategic Plan.

STRENGTHS

- Product quality
- Employee commitment, loyalty, pride and “investment” in MPW
- Excellent customer service and responsiveness
- Leadership

OPPORTUNITIES

- Continue to develop and enhance infrastructure
- Assure sufficient supply of high quality water to meet increased demand
- Further develop the MPW workforce

ASPIRATIONS

- Recognized as an industry standard of excellence
- Enhanced level of operational excellence
- High value products and services
- Investment in sufficient, skilled, and engaged staff

RESULTS

- Sufficient capacity and supply of high quality water
- Reasonable rates
- Excellent financial position
- Environmental protection



STAKEHOLDER ENGAGEMENT

On February 15, MPW's Commissioners and Management Team participated in a facilitated exercise called WaterOpolis, which simulated a utility budgeting process. WaterOpolis is designed to demonstrate the tensions that can arise between diverse organizational priorities and scarce resources in the water utility industry. Participants set organizational values, prioritize activities, and manage the utility's response to external events. Subsequently, MPW's Citizen's Water Academy members participated in the same exercise as the Citizen's Water Academy inaugural event.

This engagement was used to inform the development of the foundational elements of the 2018 MPW Strategic Plan.



CRITICAL ISSUES

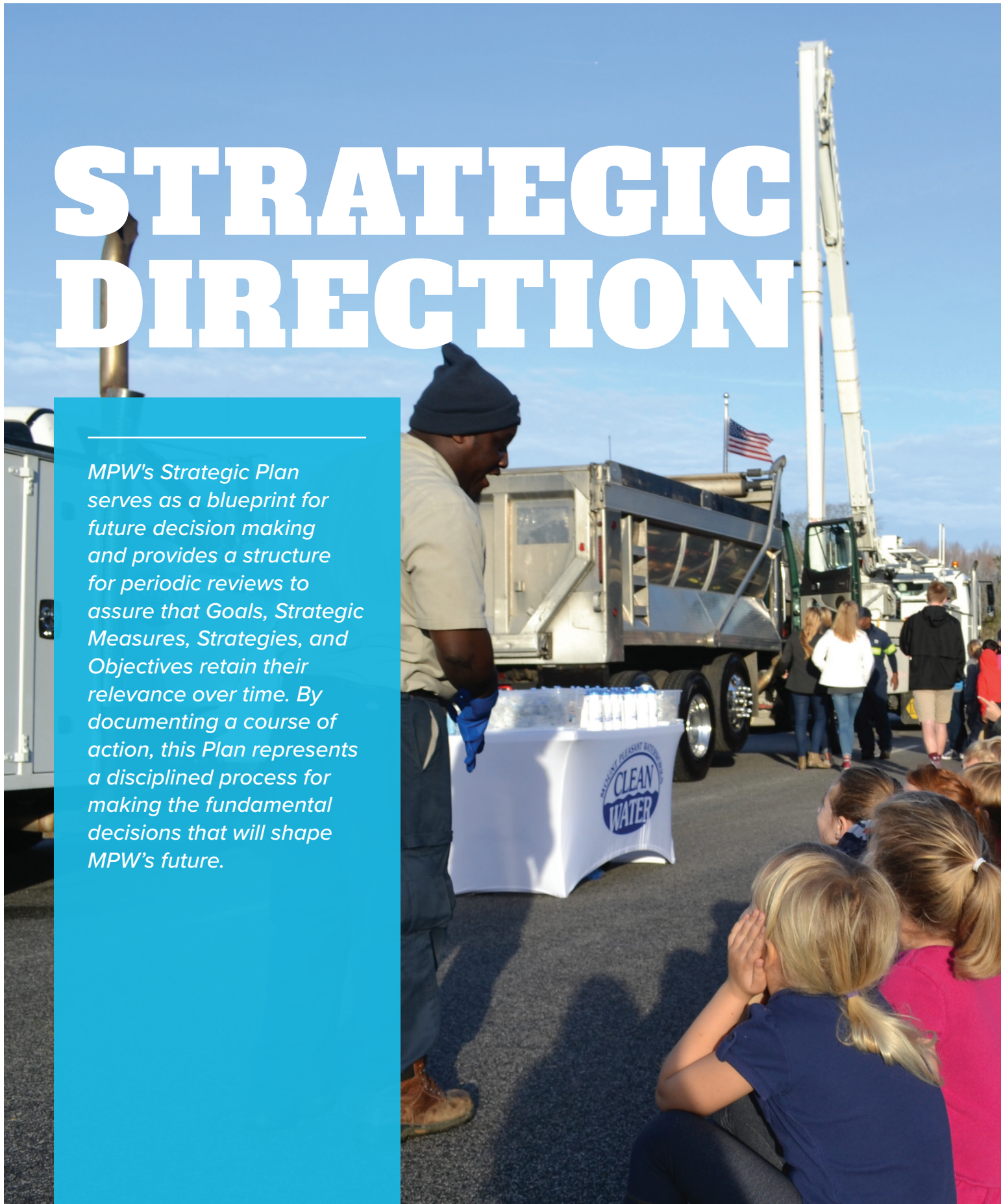
MPW's Commissioners and Management Team evaluated the most critical issues that MPW is likely to face over the next several years, which were determined to be:

- Infrastructure and operational excellence
- Quality of water, environmental protection, and customer service
- Water supply
- Workforce
- Financial viability
- Cybersecurity



STRATEGIC DIRECTION

MPW's Strategic Plan serves as a blueprint for future decision making and provides a structure for periodic reviews to assure that Goals, Strategic Measures, Strategies, and Objectives retain their relevance over time. By documenting a course of action, this Plan represents a disciplined process for making the fundamental decisions that will shape MPW's future.



VISION

Implementation of this plan will enable MPW to achieve its desired future state, as articulated in its Vision:

Mount Pleasant Waterworks strives to be a trusted leader in our community and the water industry.

MISSION

The Mission describes the organization's purpose and role within the service area. After carefully considering these factors, and evaluating its strengths, the commissioners and management articulated MPW's Mission as:

The MPW Team provides water services of exceptional quality, value, and reliability, while protecting public health, safety, and the environment.

VALUES

Values articulate MPW's deeply held beliefs, norms, and qualities, which drive day-to-day activities. The MPW Value Statement is:

The MPW team is passionately committed to:

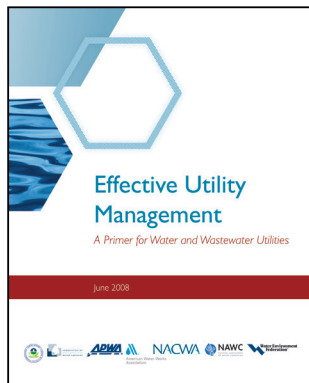
- **HONESTY:** In all actions by employees and commissioners
- **FAIRNESS:** To our customers, employees, and other stakeholders
- **QUALITY:** Of our products, services, and processes
- **INNOVATION:** By seeking positive change





GOALS

GOALS REPRESENT THE MOST IMPORTANT ISSUES THAT MPW MUST ADDRESS TO ACHIEVE ITS DESIRED FUTURE.



Since 2012, MPW’s Goals were driven by the industry standard known as Effective Utility Management (EUM). This focus on EUM in the strategic planning process has served MPW well and helped assure that the organization focused on key attributes of success. The 2012 Strategic Plan and the 2014 update considered each of the Ten Attributes of an Effectively Managed Utility as separate goals. To develop a more tightly focused strategic plan for 2018 and the next several years, MPW has consolidated the Ten Attributes into four key goals that both reflect EUM principles and consider the issues that MPW Commissioners and Management believe are most critical to success. The goals and the respective EUM attributes addressed are:

FINANCIAL VIABILITY



Recover all costs in a fiscally responsible, fair, and equitable manner.

As a complex enterprise, MPW must manage its revenues, debt, and expenses in an effective and strategic manner to assure that exceptional service is provided now and for future generations.

EUM Attribute Addressed: Financial Viability

WORKFORCE DEVELOPMENT



Recruit, train, and support qualified, committed, mission-driven employees.

MPW is proud of its high performing workforce, but recognizes that it must continue to recruit, develop, and retain excellent and committed people.

EUM Attribute Addressed: Employee and Leadership Development

CUSTOMER SERVICE



Achieve customer satisfaction through excellent communication, service, and stakeholder engagement.

Customers and other external stakeholders are critically important to MPW's long-term success, and it is important that they understand the issues MPW faces, the need for sufficient revenues, and the value that MPW provides to the community.

EUM Attributes Addressed: Customer Satisfaction, Stakeholder Understanding and Support, Community Sustainability

OPERATIONAL EXCELLENCE



Develop, maintain, and improve MPW infrastructure to provide reliable services and exceptional water quality while protecting resources and the environment.

MPW is an asset-intensive organization and the effective management of existing and future infrastructure is critical to meeting the current and future community needs for high quality water service and for protection of the environment.

EUM Attributes Addressed: Operational Optimization, Product Quality, Infrastructure Stability, Operational Resiliency, Water Resource Adequacy

STRATEGIES AND STRATEGIC MEASURES

Strategic measures demonstrate the accomplishment of the goals. Strategies are the approaches and key allocations of resources to be used in achieving each goal. These critical elements of the MPW Strategic Plan, along with the vision, values, mission, and goals, are presented in the strategic framework on the following pages.

GOALS

STRATEGIC *framework*

VISION

Mount Pleasant Waterworks strives to be a trusted leader in our community and the water industry.



MISSION


The MPW Team provides water services of exceptional quality, value, and reliability, while protecting public health, safety, and the environment.



VALUES

The MPW team is passionately committed to:


- **Honesty** – In all actions by employees and commissioners
- **Fairness** – To our customers, employees, and other stakeholders
- **Quality** – Of our products, services, and processes
- **Innovation** – By seeking positive change




FINANCIAL VIABILITY
Recover all costs in a fiscally responsible, fair, and equitable manner



WORKFORCE DEVELOPMENT
Recruit, train, and support qualified, committed, mission-driven employees



CUSTOMER SERVICE
Achieve customer satisfaction through excellent communication, service, and stakeholder engagement



OPERATIONAL EXCELLENCE
Develop, maintain, and improve MPW infrastructure to provide reliable services and exceptional water quality while protecting resources and the environment

STRATEGIC MEASURES

- Meet all objectives of the Cost Recovery Policy

1. Meet all objectives of the Cost Recovery Policy
2. Ensure the comprehensive financial health of the organization
3. Maintain sufficient rates

- Maintain at least 95% of full complement of active positions
- Increase the percentage of employees who meet training requirements in professional development plans
- Reduce workers' compensation experience modifier to less than or equal to 1

1. Continue recruiting efforts to add new talent and support succession planning
2. Complete Phase II of the Workforce Analysis Project
3. Fully implement Waterworks University
4. Improve employee input on decision making
5. Implement Knowledge Management Program
6. Improve workplace safety

- Strive for a customer satisfaction rating of 90% or better
- Increase customer and stakeholder engagement
- Promote value of Services
- Enhance outreach efforts

1. Improve customer satisfaction rating
2. Train, educate, and inform all employees on providing excellent service through communication and engagement
3. Enhance MPW's community presence & stakeholder engagement
4. Enhance customer services

- Meet or exceed all state and federal regulatory requirements
- Complete CIP projects on time and on budget
- Provide concurrent water and wastewater capacity for growth
- Maintain an optimal preventative maintenance to corrective maintenance ratio of 80:20 on non-linear assets

1. Research and evaluate the feasibility of alternative water sources
2. Plan, fund, and build for growth
3. Formally evaluate and utilize new and emerging technologies
4. Accept new infrastructure that meets MPW standards
5. Fully implement asset management
6. Implement plan for improving product quality and operational efficiency
7. Enhance environmental protection
8. Implement appropriate Security and Emergency Management measures
9. Continue to enhance focus on Innovation

OBJECTIVES

OBJECTIVES ARE THE MEASURABLE STEPS THAT MPW WILL TAKE TO IMPLEMENT AND ACHIEVE THE STRATEGIES.

GOAL: FINANCIAL VIABILITY

Strategies

1. Meet all objectives of the Cost Recovery Policy

2. Ensure the comprehensive financial health of the organization

3. Maintain sufficient rates

Objectives

- Meet 100% of the Cost Recovery Policy Objectives
- Perform an annual review of the Cost Recovery Policy

- Present a monthly financial report
- Conduct an annual audit and prepare the Comprehensive Annual Financial Report (CAFR)
- Prepare an annual budget
- Provide a quarterly report by GM on financial viability, including CIP project status

- Determine annual revenue requirements, and evaluate and adjust rates and charges accordingly
- Implement Cost-of-Service recommendations
- Evaluate a funding plan for utility line relocations related to road improvements and develop a cost containment plan
- Conduct an impact fee study



GOAL: WORKFORCE DEVELOPMENT



Strategies

1. Continue recruiting efforts to add new talent and support succession planning
2. Complete Phase II of the Workforce Analysis Project
3. Fully implement Waterworks University
4. Improve employee input on decision making
5. Implement Knowledge Management Program
6. Improve workplace safety

Objectives

- Develop standards and timeline for job postings and advertisements
- Streamline and improve onboarding
- Maintain 95% full complement of active positions
- Maintain turnover under 3%
- Formalize an internship/mentorship/apprenticeship program
- Engage a workforce analysis consultant by September, 2018
- Develop personal development plans for each employee
- Develop training to fill competency gaps
- Create a baseline percentage of employees who meet training requirements in professional development plans
- Analyze *Best Places to Work Employee Survey* results and mitigate areas of concern
- Develop cross-functional teams for strategic plan implementation
- Update Standard Operating Procedures, as necessary
- Develop and implement formal knowledge transfer program
- Reduce workers' compensation experience modifier to less than or equal to 1
- Implement healthy workforce activities





GOAL: CUSTOMER SERVICE

Strategies

1. Improve customer satisfaction rating

2. Train, educate, and inform all employees on providing excellent service through communication and engagement

3. Enhance MPW's community presence & stakeholder engagement

4. Enhance customer services

Objectives

- Achieve a Customer Satisfaction Rating of 90% or better
- Continue bi-annual customer surveys
- Conduct a comprehensive review of all customer surveys and response reports, and make recommendations for improvements
- Continue to conduct quarterly employee communications and customer service training
- Increase customer engagement through outreach events and media publications
- Increase employee involvement with community events
- Increase understanding of the value of services
- Complete the comprehensive AMI plan
- Continue to promote and measure benefits of the Service Line Care Program
- Promote benefits and analyze use of the Customer Care Program



GOAL: OPERATIONAL EXCELLENCE



Strategies

Objectives

1. Research and evaluate the feasibility of alternative water sources

- Complete 3rd Connection with CWS
- Evaluate and, if appropriate, implement source water blending
- Continue to update and implement the groundwater model
- Evaluate expanded use of reclaimed water

2. Plan, fund, and build for growth

- Complete the Utility Master Plan after Town's Comprehensive Plan update
- Work closely with the Town to coordinate a growth management plan
- Provide concurrent water & wastewater capacity for growth
- Reevaluate extension and expansion (E&E) projects to align with the Town's Growth Management Policy

3. Formally evaluate and utilize new and emerging technologies

- Evaluate and, if appropriate, implement groundwater recharge
- Evaluate and, if appropriate, implement potable reuse
- Evaluate and, if appropriate, implement a sustainable biosolids program
- Complete and implement the SCADA master plan
- Evaluate and, if appropriate, replace the current billing system
- Complete and implement an IT master plan
- Perform IT integration to optimize business & operational processes

4. Accept new infrastructure that meets MPW standards

- Review and inspect 100% of new infrastructure
- Perform testing to verify MPW standards are met
- Implement a formal commissioning and acceptance process

5. Fully implement asset management

- Complete CIP projects on time and on budget
- Decrease the frequency and severity of failures by asset class
- Optimize the ratio of preventative to corrective maintenance
- Expand planning and scheduling programs
- Finalize and implement an asset management guidance document
- Evaluate and improve mobile work order processes
- Expand reliability-centered maintenance programs beyond pump stations

6. Implement plan for improving product quality and operational efficiency

- Maintain regulatory compliance
- Reduce non-revenue water
- Implement a collection system optimization strategy
- Develop and implement a water quality improvement program
- Minimize SCADA and IT downtime
- Evaluate effectiveness of MPW's inflow and infiltration (I&I) abatement program

7. Enhance environmental protection

- Assist in improving water quality in Shem Creek
- Maintain reportable overflows to a level below EPA standards
- Engage in partnership for Safe Water Distribution

8. Implement appropriate Security and Emergency Management measures

- Increase knowledge and preparation for cyber security threats and implement comprehensive strategies
- Continue developing policies, training, plans and measures for emergency management and security

9. Continue to enhance focus on Innovation

- Explore technology for operational innovation such as direct and indirect water reuse, aquifer recharge, control of non-revenue water, and our I&I abatement.



IMPLEMENTATION

MPW HAS DEVELOPED A PLAN THAT WILL TAKE TIME AND EFFORT TO IMPLEMENT, BUT WILL SERVE AS A LONG-TERM GUIDE TO ENHANCE THE ORGANIZATION'S STRATEGIC SUCCESS.



WWW.MOUNTPLEASANTWATERWORKS.COM

1619 RIFLE RANGE ROAD
MOUNT PLEASANT, SC 29464