RAFTELIS

OWASA
Strategic Plan Work Session 1 Summary

November 18, 2021

On November 18, 2021, members of the OWASA Board and Leadership Team met to discuss the results of the environmental and operating scan conducted by OWASA staff. The scan included the results of OWASA staff's assessments of the organization's strengths, opportunities, aspirations, and results (SOAR) by department, the results of an employee survey, the result of a OWASA Board survey (both past and present members), the results of a community survey, the results of interviews with other OWASA stakeholders, and a literature review of relevant strategic plans.

The work session provided an opportunity for the group to learn about the results of the scan and to discuss key takeaways. Themes from their discussion are summarized below. The discussion was divided into two sections: reactions to feedback from internal stakeholders (current and former Board Members and current staff), and reactions to feedback from external stakeholders (customers and other stakeholders).

Themes from the Internal Stakeholder Feedback Discussions

Communications
The groups discussed the importance of every OWASA employee being equipped to serve as the face of the organization when interacting with customers and the community. The groups discussed employee's notation of lack of community trust, which stem back from community water emergencies in 2017 and 2018.

Security
The groups noted that many employees discussed the importance of document management and cybersecurity. The rest of the strategic planning process will provide an opportunity to explore these needs more thoroughly.

Affordability versus Service Levels
The groups observed that staff generally did not list affordability as a top priority, even though this was often a top priority among external stakeholders. They also noted that there is a tradeoff between affordability and many of the other priorities discussed both internally and externally, and that it is important to strike the right balance between the two. The strategic plan will provide an opportunity to explore options to keep service affordable, including identify opportunities to cut costs and new business models for generating revenue.

Difference in Staff Perspectives versus Others
More broadly, the groups noted that staff generally had different priorities than Board Members or external stakeholders. For example, Resource Management was the highest priority for the Board, but not one of the highest for staff. Employees also prioritized customer focus much more highly than Board members. Finally, employees generally did not prioritize diversity and inclusion efforts, even though this has been a major Board initiative; although, they did identify it as an opportunity for improvement. The groups suggested that one reason for the disparity is likely that staff comes from a perspective of looking at day-to-day operations, rather than higher-level trends.

Recruitment and Retention Concerns
The groups discussed how concerns about employee recruitment and retention were frequently mentioned by staff. They also noted that a potential reason could be the recent labor market changes have likely impacted operations because of the increase in employee turnover and the difficulty of hiring qualified individuals to fill vacancies. Some in the discussion expressed in an interest in learning more about this concern. Some members of the groups also had concerns that several employee survey respondents reported that staffing in their area is not sufficient to perform at the highest level. However, the groups noted that it is common for respondents to employee surveys to express concerns about staffing levels and employee pay, and that it is important to evaluate the organization's needs broadly as well. One potential next step is to conduct a pay and classification study to see how OWASA aligns with the market. The groups also observed that employee development was a priority for both the Board and staff.

Water Resources
The groups discussed the disparity in opinions regarding OWASA's use of Jordan Lake by Board members. Some were unaware of the political resistance. This is an issue that is being addressed in the current strategic plan.

Themes from the External Stakeholder Feedback Discussions

External Communication
The groups noted that many respondents answered "don't know" to questions on the community survey about OWASA products and services as well as efforts to protect the environment. This presents an opportunity to refine OWASA's communication strategy moving forward on issues that are important to the community like sustainability and cost offsets. The groups also observed that many external stakeholders reported satisfaction with OWASA's communications, but that stakeholders have expressed dissatisfaction in the past particularly during emergency situations.

Additionally, the groups observed that some external stakeholders mentioned concerns about their water quality. The groups discussed how this may be related to the stakeholders' own plumbing systems and that it is important to educate customers on how their plumbing may affect their water's taste and smell. This education may also help customers be more satisfied with the cost of service since the community survey showed a correlation between concerns about water quality and concerns about cost.

Future Planning
The groups discussed how most comments from external stakeholders seem to be focused on the present, rather than considering how OWASA should plan for the future. They noted that it is OWASA's responsibility to determine a vision for the organization and to communicate this vision externally, and that is why it is important for the Board to be future-focused and to hold internal discussion about actionable future steps to achieve OWASA's goals.

Willingness to Pay
The groups were surprised that nearly 70% of community survey respondents indicated a willingness to pay more for OWASA water, if they received a higher level of service. They discussed how this response conflicted with responses to other questions in the survey, where many respondents discussed concerns about the cost of OWASA's water. It is unclear how reflective either sentiment is of the customer population as a whole. The groups also noted that it is also important to keep in mind that even if many customers are willing to pay more for their water, a portion of the population would be significantly impacted if their water bill went up.

Survey Representation
The groups noted that the community survey is not representative of customer base in some ways, such as its racial makeup. The groups generally felt that the results of the survey were representative, but that careful consideration of the data is required before making decisions.

Final Words

At the end of the session, each participant provided a final word or phrase describing how they felt about the experience and the strategic planning process moving forward. Their responses are shown below.

- Intrigued- I'm interested in how we get through sessions and come out the other end
- Let's not forget we're a science-based organization
- Informed with a question mark- I want to make sure that we don't go down a path that's not represented accurately in the data
- Interested to see where we get from where we are today to a great end product
- Surprised- Great amount of data, great discussion
- Skeptical on spending whole next session on mission and values, would be better to dive into strategic plan platform
- Enthusiastic
- Looking forward to the next session
- Interested to see where we get from where we are today to the final Strategic Plan
- Grateful to the staff who gave all the information
- Confident that we'll get it right
- It is frustrating to draw conclusions from the data, but it is a worthwhile process, and I am glad people are leading this who know what they are doing
- Excited about the potential this has to have a great and meaningful impact on our community and the services we provide