



# STRATEGIC PLAN

## 2023-2027



# WORKING WITH THE COMMUNITY TO PROTECT PUBLIC HEALTH AND ENVIRONMENT

The Orange Water and Sewer Authority has proudly served the Chapel Hill and Carrboro community for over 45 years. We take pride in the services that we provide to protect the health of the community and our beautiful and bountiful environment. In pursuing our strategic plan, we will work to be our community's trusted partner for clean water and environmental protection for decades to come, taking on the most pressing challenges and opportunities.

Our strategic plan helps to ensure that we are anticipating and preparing for the future that we want and setting a course for aligning valuable resources with our strategic goals and objectives. We utilized the development process as a time to think comprehensively and identify broad-reaching strategic goals and initiatives for the next five to six years, engaging employees, community members, stakeholders, and past and present board members.

Over the next five years, **OWASA will plan for and respond to a broad range of issues, from ensuring that we recruit and retain a dedicated workforce to preparing for emergencies and climate change.** You can count on us to track and evaluate the effectiveness of our plan and adjust as necessary. This plan will allow us to adapt to changing conditions, while maintaining the highest level of service for our community.

We can't do it alone. We invite you to join us in our stewardship of the community's water and sewer infrastructure and the natural resources that are so critical to our health, environment, and economy. Conserve water. Tour the water treatment plant. Join the Board. Join the Team. **We look forward working WITH you to protect public health and environment today and for years to come.**

In partnership,

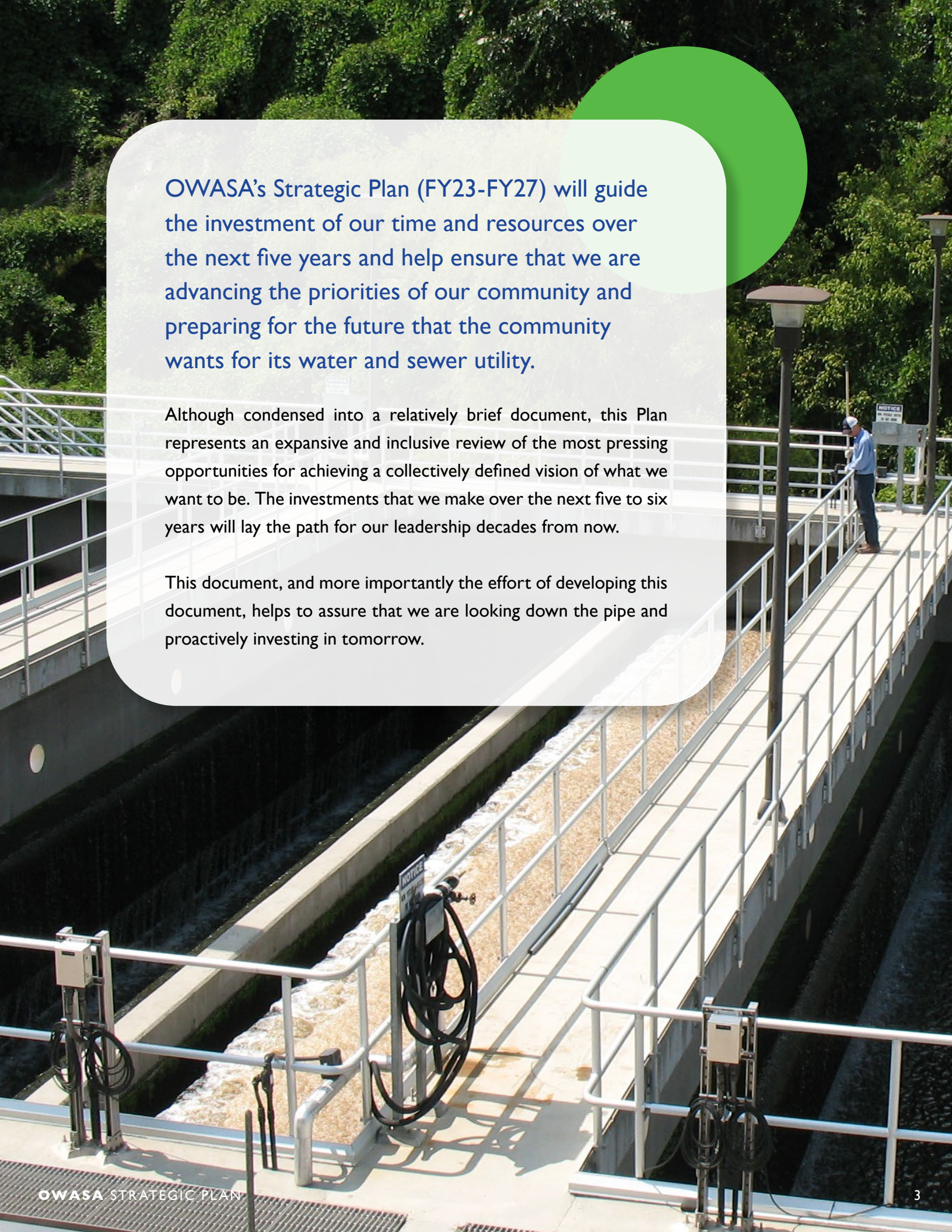
**BRUCE BOEHM**  
*Chair of the OWASA Board*



**TODD TAYLOR, P.E.**  
*Executive Director*







OWASA's Strategic Plan (FY23-FY27) will guide the investment of our time and resources over the next five years and help ensure that we are advancing the priorities of our community and preparing for the future that the community wants for its water and sewer utility.

Although condensed into a relatively brief document, this Plan represents an expansive and inclusive review of the most pressing opportunities for achieving a collectively defined vision of what we want to be. The investments that we make over the next five to six years will lay the path for our leadership decades from now.

This document, and more importantly the effort of developing this document, helps to assure that we are looking down the pipe and proactively investing in tomorrow.



# DEVELOPMENT PROCESS

Assisted by OWASA staff and strategic planning consultant Raftelis and informed by a broadly focused scan, the OWASA Board of Directors, Executive Director, and Leadership Team developed the following strategic plan.

Staff engagement was critical to the process. Early on, a Strategic Planning Advisory and Resource Council (SPARC) was formed of staff from across the organization. The SPARC collectively provided feedback on individual steps of the Plan's development and represented the Plan to the entire OWASA Team. Additionally, members of the SPARC helped to design, implement, and analyze components of the scan. They also served as members of task forces to have challenging, yet inspiring, conversations about what is truly needed to advance OWASA's strategic priorities. And as the Strategic Plan has been finalized, the SPARC served as ambassadors for the Plan and will, no doubt, be critical, alongside other Team members, in advancing its initiatives.



OWASA undertook a multi-faceted scan to help assess the current organization and environment in which we are working. This scan included:

- Departmental assessments of OWASA's strengths, opportunities, aspirations, and (desired) results
- Survey of current and past Board members
- Sessions with representatives from institutions that OWASA serves and works with, businesses, and other important stakeholders
- Literature review of the strategic plans of leading utilities and businesses across the country, community partners, and utility industry organizations
- Survey of OWASA employees
- Survey of community members

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DEPARTMENTAL  
SOARs

23

BOARD  
PARTICIPANTS

34

STAKEHOLDER  
PARTICIPANTS

51

STRATEGIC  
PLANS REVIEWED

61

EMPLOYEE  
PARTICIPANTS

1,153

COMMUNITY  
PARTICIPANTS

## WE APPROACHED THE SCAN WITH THE FOLLOWING QUESTIONS:

Who is OWASA?

What are our strengths?

What values and priorities  
do various groups hold for  
OWASA to consider in our  
strategic plan?

What is currently happening  
or emerging that presents  
opportunities for OWASA?

The OWASA Board of Directors and Leadership Team used the results of this scan as a foundation for their revisions to OWASA's vision, mission, and values and the identification of the top strategic priorities for the organization over the next five to six years.

Task forces of OWASA staff, including members of the Leadership Team, organized around each of the strategic priorities to identify and prioritize goals for each priority and the initiatives required to achieve them. The OWASA Board of Directors provided input on the recommendations made by OWASA staff in order to finalize a draft strategic plan. Before finalizing the plan, the draft was put forward to OWASA staff and the community for feedback and input.

The result is a Strategic Plan that was collectively developed by the OWASA Board, staff, stakeholders, and community. This inclusive approach to the development and execution of the Plan is critical to its representation and ultimate success.



## WHAT WE LEARNED: THEMES FROM THE SCAN

The OWASA of the future stands on a solid foundation that was recognized by various groups in the scan. Five commonly referenced attributes of OWASA and our staff included:

COMMUNITY-  
MINDED

CUSTOMER  
SERVICE

COMMITMENT  
TO QUALITY

RELIABLE

CONTINUOUSLY  
IMPROVING

# CHALLENGES AND OPPORTUNITIES

**WORKFORCE ISSUES** OWASA has an excellent and dedicated team; our employees are our most valuable resource. Ensuring that OWASA is attracting a high volume of diverse and promising applicants has become increasingly important and challenging as the labor market tightens and OWASA faces unprecedented levels of retirement eligibility. Once here, employees need engagement, training, and recognition to bring their best selves forward and grow within the organization.

**TECHNOLOGY AND INNOVATION** Technology is a vital tool for maximizing the efficiency of a utility's operations and for connecting with customers, but the use of technology can also carry risks, particularly for cybersecurity. OWASA has made good and efficient use of technology over the years, but this field is rapidly evolving. Technology is increasingly complex, changes quickly, and will continue to require substantial resources. Additionally, community expectations for technology are increasing, and there is additional pressure for real-time information and data.

**ENVIRONMENTAL PROTECTION** OWASA's operations are intricately intertwined with the environment; we are both affected by and affect the environment. Climate change was a frequently cited challenge for OWASA to manage in the future. Participants in the scan recognized the link between land use, watershed protection, and water quality and called for OWASA to prioritize initiatives to advance and communicate our work in environmental protection.

**COMMUNICATIONS** Achieving and maintaining the trust of our community requires that we effectively engage with them and respond to their needs. The community survey identified some informational gaps regarding OWASA's commitment to environmental protection, sustainability, and infrastructure construction. The scan recognized that there is no one best practice to communicate, and that OWASA should be working on a number of fronts to communicate and connect.

**REGULATORY RESPONSIBILITY & RISK** OWASA operates in a heavily regulated field. We are responsible for meeting the regulations of today and staying ahead of tomorrow's regulations. Additionally, it is critical that OWASA maintains a responsible level of investment in the repair and rehabilitation of our community's water and wastewater infrastructure to ensure the quality and reliability of services so essential to public health and environmental protection.



# OWASA'S STRATEGIC PLAN

## (FISCAL YEAR 2023 – 2027)



### VISION

To be our community's trusted partner for clean water and environmental protection.



### MISSION

Our dedicated Team delivers valuable water and sewer services that are essential to our community's health, environment, and economy through the stewardship of infrastructure and natural resources.

### VALUES

#### DIVERSITY & INCLUSION

We are committed to creating an inclusive workplace that promotes and values diversity.

#### TEAMWORK & PARTNERSHIP

We work together to achieve shared goals.

#### RELIABILITY

We are committed to consistently providing high-quality products and services.

#### SAFETY

We put the safety of our employees and community above all else.

#### INTEGRITY

We can be counted on to use sound judgment and follow-through on our promises.

#### EQUITY

We work to ensure fair access to and delivery of our essential services.

#### STEWARDSHIP

We make wise and efficient use of the financial and natural resources with which we are entrusted.

#### INNOVATION

We take a creative approach and adapt to changing circumstances.



## ONE WATER

Water connects us: past, present, future. We take an integrated approach to our management of surface water, drinking water, wastewater, and reclaimed water. It is our responsibility to treat it well for downstream uses, while at the same time respecting its upstream power.



## STRATEGIC PRIORITIES

- Employee recruitment, retention, and development
- Equitable services
- Climate and land use change adaptation
- Community engagement
- Emergency management and cybersecurity
- Service reliability and resiliency



# STRATEGIC PRIORITIES

## EMPLOYEE RECRUITMENT, RETENTION, AND DEVELOPMENT

OWASA's mission requires a dedicated team. The following initiatives make advancements beyond the myriad of important HR efforts underway. This priority has a high-level of overlap with OWASA's organizational value of Diversity and Inclusion.

### GOAL

- ① Increase the number of applicants for entry-level and/or high-turnover positions
- ② Achieve and maintain competitive compensation
- ③ Ensure staff are prepared, informed, and engaged to lead OWASA into the future

### INITIATIVE



Develop a recruitment strategy for entry-level and high-turnover positions



Conduct and implement a Pay and Class Study



Develop and institute an Employee Development Plan





## EQUITABLE SERVICES

This priority focuses on assisting those in our community who face challenges with obtaining and paying for our services. The following goals and initiatives were identified as near-term opportunities to increase the equity of OWASA's life-critical services.

### GOAL

- ① Decrease number of disadvantaged/underserved households not connected to OWASA's services
- ② Increase adequacy and accessibility of customer assistance funding



### INITIATIVE

- Identify affected households and pursue outside funding to connect
- Evaluate and update Care to Share program



# CLIMATE AND LAND USE CHANGE ADAPTATION

Climate change readiness/adaptation was universally identified as a high priority by OWASA staff, Board, community, and stakeholders. In the strategic priority-setting workshop, climate change mitigation was differentiated from adaptation: adaptation was rated a very high priority to address, mitigation was not. Additionally, recognizing the interplay between climate change and land use change (particularly on hydrology), adaptation to land use change is included in this strategic priority.

## GOAL

- ① Increase drought resilience
- ② Prepare for organizational impacts of climate and land use change

## INITIATIVE



Implement most viable Jordan Lake alternative



Develop Climate Action Plan







## SERVICE RELIABILITY AND RESILIENCY

Service reliability and resiliency are at the core of ensuring that our water and sewer services are valued and the community's trust is developed and maintained. This requires us to ensure our infrastructure remains in good working order, our investments and operations are data-driven, and we have redundancy in the system.

### GOAL

### INITIATIVE

- |  |   |   |
|--|---|---|
| ① Increase capital project execution   | ➡ | Develop and pursue Project Delivery Optimization Plan |
| ② Reduce downtime of critical infrastructure and equipment                             | ➡ | Update and execute Asset Management Plan              |
| ③ Improve the collection and use of real-time data to inform and drive decision-making | ➡ | Execute SCADA Master Plan                             |
| ④ Establish and pursue capital investment goals  | ➡ | Establish and implement Capital Investment Strategy   |





## EMERGENCY MANAGEMENT AND CYBERSECURITY

The OWASA Board (past and present), stakeholders, and community members all ranked “preparing for emergencies and cybersecurity threats” as one of their top three priorities for OWASA to address over the next five years. However, preparation is only one aspect of emergency management. It is equally important to focus on the prevention of, protection against, response to, and recovery from emergencies and cybersecurity threats. Therefore, this priority was adapted to broadly address emergency management. OWASA has a robust emergency management and cybersecurity program. The following initiatives will enhance existing efforts and help to increase our capacity to manage emergencies.

### GOAL

① Ensure staff are prepared and ready for emergencies of all types



### INITIATIVE

Develop and institute a Continuous Emergency Preparedness Model

② Reduce risk exposure



Assess risk on collection and wastewater system and implement high priority risk mitigation actions for entire system



## COMMUNITY ENGAGEMENT

Achieving and maintaining the trust of our community requires that we effectively engage with them and respond to their needs. The community survey identified some informational gaps regarding OWASA's commitment to environmental protection, sustainability, and infrastructure construction. In addition to continuing to pursue and refine OWASA's Communications and Community Engagement Program, the following goals and initiatives were prioritized to further enhance our community engagement.

### GOAL

- ① Increase the quality and use of community feedback
- ② Streamline customer account experience



### INITIATIVE

- Develop and implement regular community survey
- Integrate online billing and water use portals





