



**DISTRICT OF COLUMBIA  
WATER AND SEWER AUTHORITY**

BOARD OF DIRECTORS

*Strategic Planning Committee Meeting  
AGENDA*

**Thursday, January 23, 2014  
9:30 a.m.**

**5000 Overlook Avenue, SW  
Washington, DC 20032**

- I. Call to Order.....Robert Mallett  
Chairperson
  
2. [Presentation on the Strategic Plan Implementation](#).....George Hawkins/Ernest Jolly
  
3. Other Business.....Robert Mallett  
Chairperson
  
4. Adjournment

# DC WATER

## BLUE HORIZON 2020

Strategic Planning Committee Presentation  
January 23, 2014



# Presentation Agenda

- Background
- Current Status
- Next Steps
- Questions/Discussion

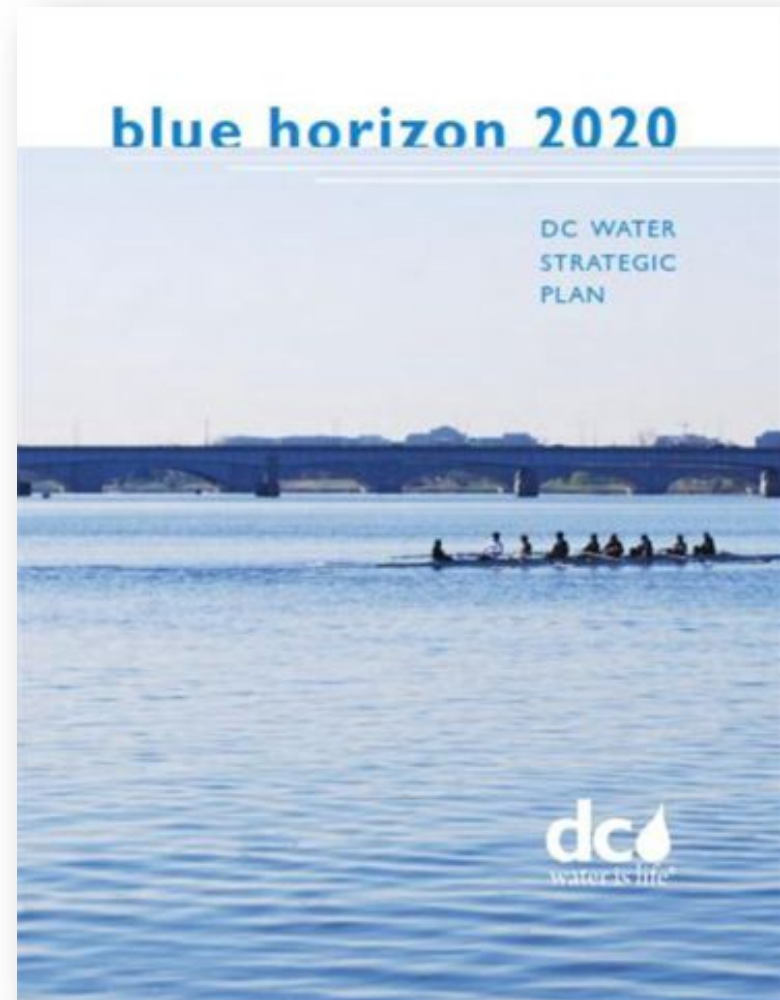
# Background – History

February 2012 – March 2013

## Strategic Plan Development

1. Preparation
2. Board Retreat
3. Board Committees
4. Executive Management
5. Senior Managers
6. Key Staff

Result →



# Blue Horizon 2020 Framework

- 9 Goals
- 27 Objectives
- 45 Initiatives



# Our Focus Areas



## LEADERSHIP

DC Water will advocate and lead local, regional, and national collaborations, while internally developing the workforce of the future.



## VALUE

DC Water will be recognized for the value it delivers by protecting public health and the environment, supporting community sustainability, and providing for economic vitality.



## INNOVATION

DC Water will achieve international prominence in development and adoption of science, technology and processes in support of a culture of innovation.

# Committee Assignments

	Goal	Goal Champion
1	<b>Develop, Maintain, and Recruit a High Performing Workforce:</b> Human Resources/Labor Relations Committee	Rosalind Inge
2	<b>Collaborate Locally, Regionally, and Nationally:</b> Governance Committee	John Lisle
3	<b>Increase Board Focus on Strategic Direction:</b> Strategic Planning Committee	Randy Hayman
4	<b>Enhance Customer/Stakeholder Confidence, Communications, and Perception:</b> DC Retail and Sewer Rates Committee	Charlie Kiely
5	<b>Assure Financial Sustainability and Integrity:</b> Finance & Budget Committee	Mark Kim
6	<b>Assure Safety and Security:</b> Water Quality and Water Services Committee	Walter Bailey
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8	<b>Optimally Manage Infrastructure:</b> Environmental Quality and Sewerage Services Committee	Len Benson
9	<b>Enhance Operating Excellence Through Innovation, Sustainability, and Adoption of Best Practices:</b> Audit Committee	Katrina Wiggins

# Current Status of Implementation Management Program

- Overview of the Implementation Guide
  - Messages & Purpose
  - Phases
  - Accountabilities
  - Roles and Responsibilities
  - SOPs
  - Performance Management
- Training and Ongoing Support



# Messages

**Committed to Strategic Management / Linked / We are “All In”**

- Chairman’s Message
- General Manager’s Message
- Strategic Planning Chief’s Message

# Purpose

1. Provides strategic management guidance
2. Reviews Blue Horizon 2020 Strategic Plan development
3. Defines accountabilities, roles, and responsibilities
4. Presents detailed workflows (SOPs) with responsible parties
5. Integrates Blue Horizon 2020 requirements into the existing DC Water calendar
6. Discusses performance management
7. Provides hands-on training for the online tool My Strategic Plan

# 3 Phases

## 1. Planning

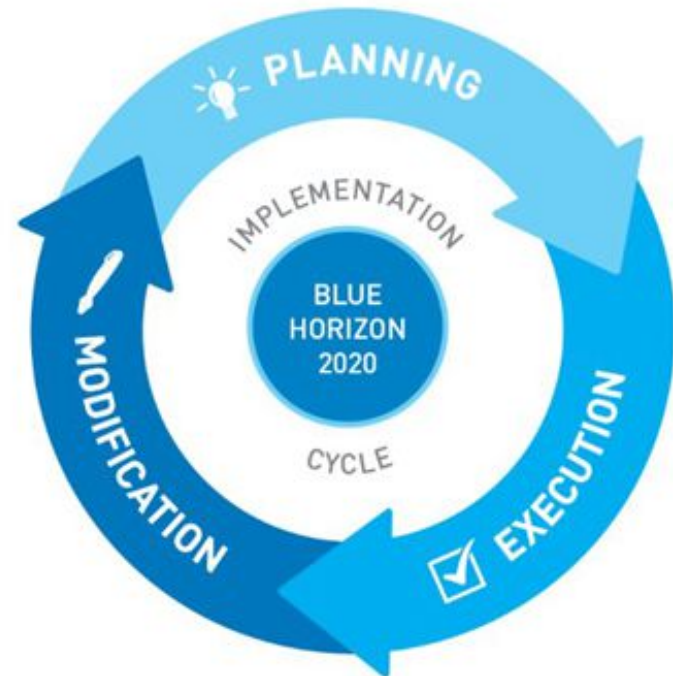
- Obtain Strategic Direction
- Develop Strategic Framework

## 2. Execution

- Initiative Advancement
- Manage, Monitor & Report

## 3. Modification

- Change to Address Needs



# Accountabilities



ACCOUNTABILITY STRUCTURE	STRATEGIC PLAN STRUCTURE	FREQUENCY OF PROGRESS REPORTING	FREQUENCY OF MODIFICATIONS
BOARD	VISION, VALUES, MISSION, GOALS		5 YEARS
BOARD/ GENERAL MANAGER	OBJECTIVES	ANNUALLY	3-5 YEARS
EXECUTIVE TEAM/ GOAL CHAMPIONS	INITIATIVES/ MILESTONES	QUARTERLY	1-2 YEARS
INITIATIVE CHAMPIONS	MILESTONES	MONTHLY	1-2 YEARS

# Roles & Responsibilities

## Strategic Planning Committee

- 1. Receive updates semi-annually**
- 2. Consider GM/Executive Team Strategic Plan modification recommendations**
- 3. Review Strategic Plan annually and make recommendations to the Board regarding both long and short term strategic planning direction**

# Roles & Responsibilities

## Strategic Planning Chief

1. Support Plan Participants
2. Monitor and Document Overall Progress
3. Support Resource Requirements
4. Communicate Status Across Organization and serve as General Manager's key POC
5. Administer Online Management System

# Roles & Responsibilities

## Goal Champions

- 1. Assemble Resources**
- 2. Direct Resources – Initiative Completion**
- 3. Meet regularly with Initiative Champions**
- 4. Communicate Progress**
- 5. Recommend Changes**
- 6. Maintain Budget Accountability – 2 Aspects**
  - Identify and include requested department budgets under Goal Champions organizational structure
  - When costs are in another department, communicate budget requests to Executive counterpart for inclusion in the appropriate department's annual budget request

# Roles & Responsibilities

## Initiative Champions

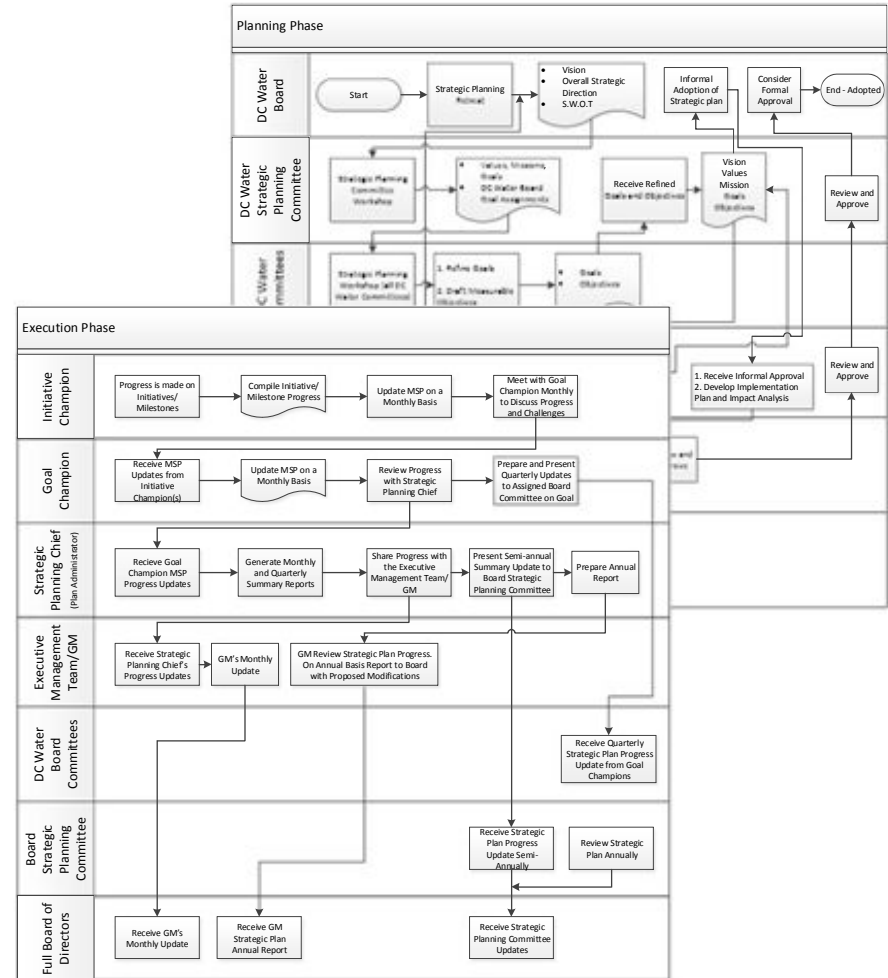
1. Assemble Resources
2. Drive Milestone Completion
3. Meet regularly with Goal Champions
4. Record Progress
5. Recommend Changes



# Workflows (SOPs)

Document SOPs (Who & What) of:

1. Planning Phase
2. Execution Phase
3. Modification Phase



# Integration of Blue Horizon 2020

**Ensure alignment with organization's key activities**

**Support in a way to minimize the time required to provide updates and feedback**

- 1. Budgeting Process**
- 2. Board Committee Meetings and Progress Reporting**
- 3. GM's Strategic Planning Dashboard**
- 4. Departmental and Individual Performance Planning**

# MyStrategicPlan by M3 Planning

Cloud-Based (Internet)

Supports Implementation

## 1. Planning

- Entire plan is on-line
- Linear View (G,O,I,M)
- Set/Assign Responsibilities

## 2. Updating/Tracking

- Single Environment (no paper)
- E-mail Notification
- Goal & Initiative Champion Collaboration
- Track Milestone Progress across all 49 Initiatives

## 3. Reporting

- Easy, Fast, Straight Forward



*G: Goals*  
*O: Objectives*  
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# MSP Performance Mode - Homepage

Recently achieved goals appear here.

Priority items appear alongside a bar showing the goal's progress.

The activity feed shows everything you and your team are doing.

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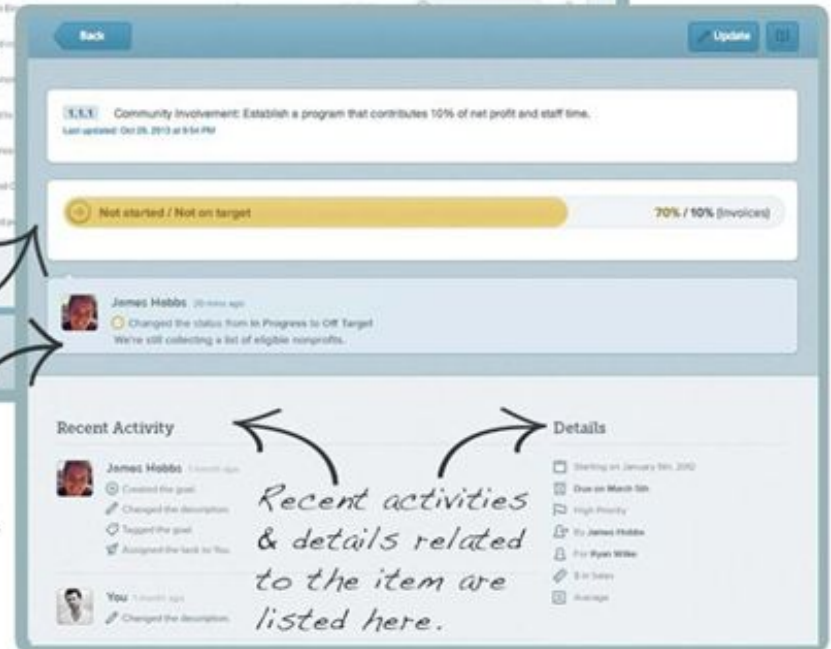
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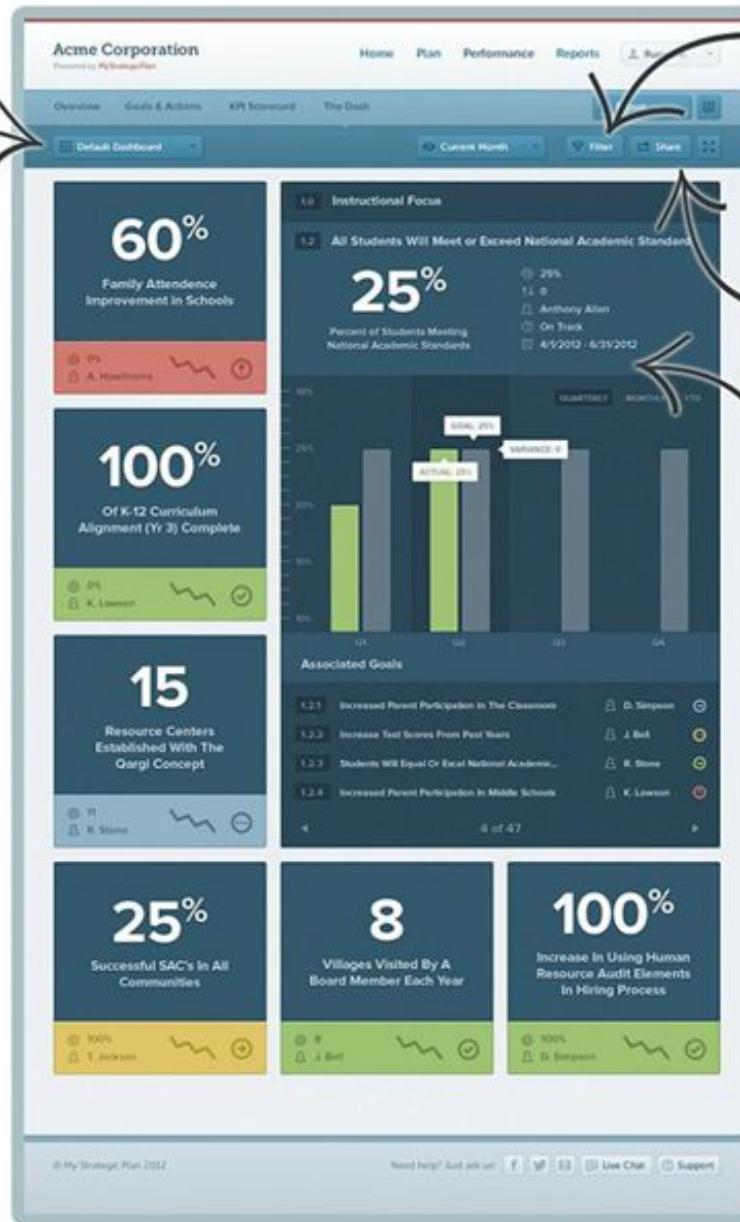
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# MSP Dashboard

*Save customized dashboards so the information you need is always front and center.*



*Filter and sort by organizational function, status and priority.*

*Save view and share with others.*

*Detailed view of performance by month, quarter and YTD.*

# Performance Management

## Areas of Performance Management:

- Strategic Plan Initiatives – Milestones**  
(April 2013)
- Operational Performance – Key Performance Metrics (Under Development)**
- Strategic Plan Objectives – Outcomes**  
(Under Development)



# Training and Ongoing Support

- December 11 – 18, 2013  
Conducted 7 End User Training Sessions for Goal and Initiative Champions (36)
- Schedule additional sessions for those who missed the initial sessions
- Conduct one-on-one sessions with Goal and Initiative Champions



# Next Steps

## The GM Strategic Planning Dashboard

- Finalize the list of Key Operational Performance Metrics
- Finalize the Measures and Targets for the Strategic Plan Objectives which reflect progress over the longer term
- Provide routine reporting on Initiative Milestones progress

# Reporting Process



## SAMPLE GM's STRATEGIC PLAN DASHBOARD



# When Fully Implemented

# DC WATER

## BLUE HORIZON 2020

Strategic Planning Committee Report  
January 23, 2014



# Report Outline

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# Messages

**Committed to Strategic Management / Linked / We are “All In”**



## **CHAIRMAN'S MESSAGE**

DC Water is flowing into a period of vast opportunity, but also enormous challenges that will be difficult to navigate without careful

planning and a clear vision for the future of the enterprise. That vision is encapsulated in the Blue Horizon 2020 Strategic Plan.

The Board of Directors and the Executive Management Team have collaborated to assess key industry trends and the greatest threats, and to identify the critical factors important to DC Water's long term success. We now have a strong course of action, with clear goals and objectives, and detailed steps for implementation and monitoring that will guide DC Water's progress for years to come. I look forward to working with the General Manager and his team to ensure DC Water reaches its full potential.



Allen Y. Lew, Chairman  
DC Water Board of Directors



## **GENERAL MANAGER'S MESSAGE**

It has been a great pleasure to work with the Board of Directors to examine our strengths, weaknesses, opportunities and threats, and to set an overall strategic direction that will ensure we remain accountable to our ratepayers and meet the challenges ahead, from increasingly stringent federal mandates to an aging infrastructure and workforce.

The Blue Horizon 2020 Strategic Plan is a blueprint for excellence in service, technology and environmental sustainability. The services we provide are vital to every person, business and community in the region and it is our priority to prepare for challenges and develop solutions today and for the future.

At DC Water, we will utilize the Blue Horizon 2020 Strategic Plan as a clear vision for efficient and effective performance, financial responsibility, outreach and leadership. It will make us a world-class utility and a leader in the areas of customer service, technology, science and business. I look forward to the actions we will take and the impacts we will have in making sure that every dollar from our ratepayers goes farther, while improving our services to the District, the region and the environment.



George S. Hawkins, General Manager  
DC Water

# Messages

## STRATEGIC PLANNING CHIEF'S MESSAGE

The Blue Horizon 2020 Strategic Plan and its companion document, Blue Horizon 2020 Implementation Guide, combine to serve as DC Water's blueprint for strategic management. It establishes a framework for operational decision-making in the context of DC Water's long-term vision. Successful implementation of Blue Horizon 2020 is essential to the achievement of DC Water's organizational goals and objectives.

DC Water as a whole is greater than the sum of its parts. Blue Horizon 2020 addresses that "greater sum," and requires a holistic strategic view for the organization. Blue Horizon 2020 maintains focus on issues that transcend the boundaries of departments and other units of the organization while at the same time, it affirms the responsibility of organizational units to achieve excellence; and, moreover, the importance of dynamic interchange and synergy between individuals, departments and leadership at the center of the organization.

The Blue Horizon 2020 Strategic Plan provides guidance in priority setting for funding and allocation of additional resources and is an integral part of the budgetary process. As such, Blue Horizon 2020 Strategic Plan implementation activities follow DC Water's fiscal year which begins October 1 and ends September 30. Blue Horizon 2020 also serves as a guide for leadership in establishing departmental and individual performance goals for employees.

The Blue Horizon 2020 Strategic Plan is a 'living document' that will change over time. The Implementation Guide provides a number of related business requirements that provide the structure and procedures that enable the organization to ensure that Blue Horizon 2020's goals and objectives retain their relevance over time. It provides for quarterly and annual reviews of organizational performance and considers changes to the Strategic Plan necessitated by previously unforeseen fluctuations in business conditions as well as emerging opportunities created through innovation.

With sustained commitment to the implementation of Blue Horizon 2020, DC Water is poised to achieve its status as a world-class water and wastewater utility.



Ernest L. Jolly, Strategic Planning Chief  
DC Water

## ACKNOWLEDGEMENTS

Special thanks to the Board of Directors and the General Manager and Executive Team for the direction and depth of engagement that has led to the creation of Blue Horizon 2020 and the Implementation Guide. Thanks to the employees of DC Water, our valued customers, community leaders and business partners for your insight and support as we strive to become your world-class utility.

In the spirit that embodies DC Water, we will continue to work together to realize the shared vision of Blue Horizon 2020; and, in turn, we will continue to accomplish great things.

# Purpose

In support of the continued success of DC Water's mission of exceeding expectations of its diverse constituency by providing high quality water services in a safe, environmentally friendly and efficient manner, the Office of the General Manager, Strategic Planning Unit has developed this implementation guide to provide direction and context to achieve our aspirational goals and serve as our compass in defining our future. This guide is designed as a companion reference for the Blue Horizon 2020 Strategic Plan. Specifically this document provides:

- ▶ Explanations for the purpose and background of the Blue Horizon 2020 Strategic Plan and the relevancy of this Implementation Guide;
- ▶ Discusses the primary business processes of Blue Horizon 2020 Strategic Plan development and Implementation;
- ▶ Discusses roles and responsibilities of key DC Water participants;
- ▶ Provides detailed workflows showing tasks of responsible parties for implementation progress reporting and change, or modification requests to plan elements;
- ▶ Explains Blue Horizon 2020 Strategic Plan Implementation Calendars;
- ▶ Discusses performance management approach for plan implementation and progress toward the plan's objectives; and
- ▶ Introduces the on-line management, monitoring and reporting tools called "My Strategic Plan".

The Office of the General Manager functions as the manager of the Strategic Plan Implementation. The Strategic Planning Chief serves as the principal executor of the Strategic Plan and is the designated Plan Administrator of the on-line tool called "MyStrategicPlan" (MSP). The Strategic Planning Chief operates jointly with appointed plan implementation participants to assure the effective implementation of the Strategic Plan.

# 3 Phases

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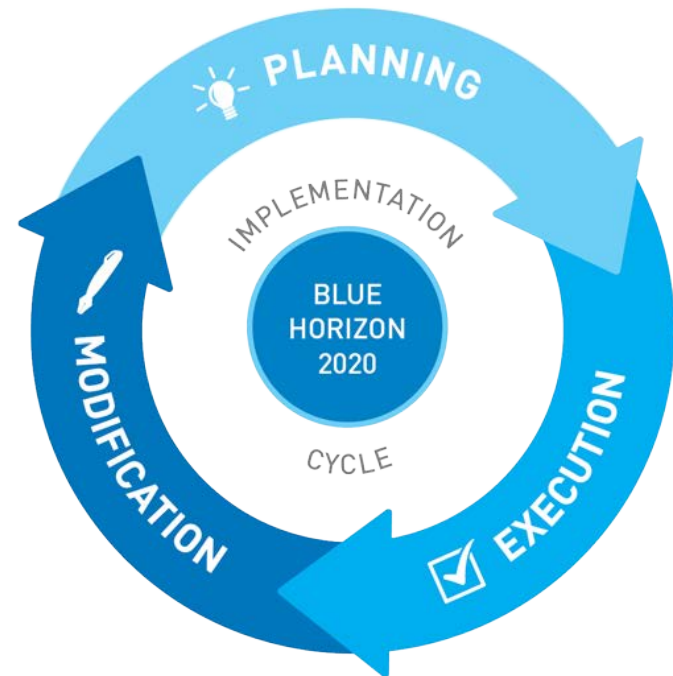
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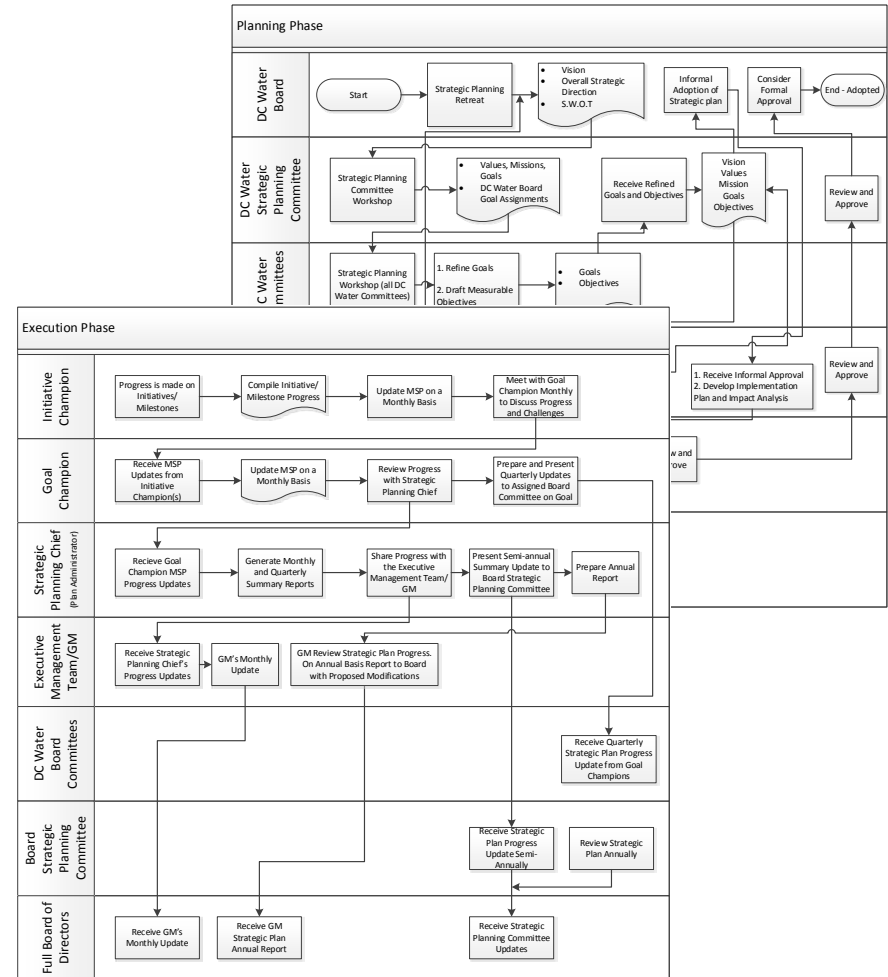
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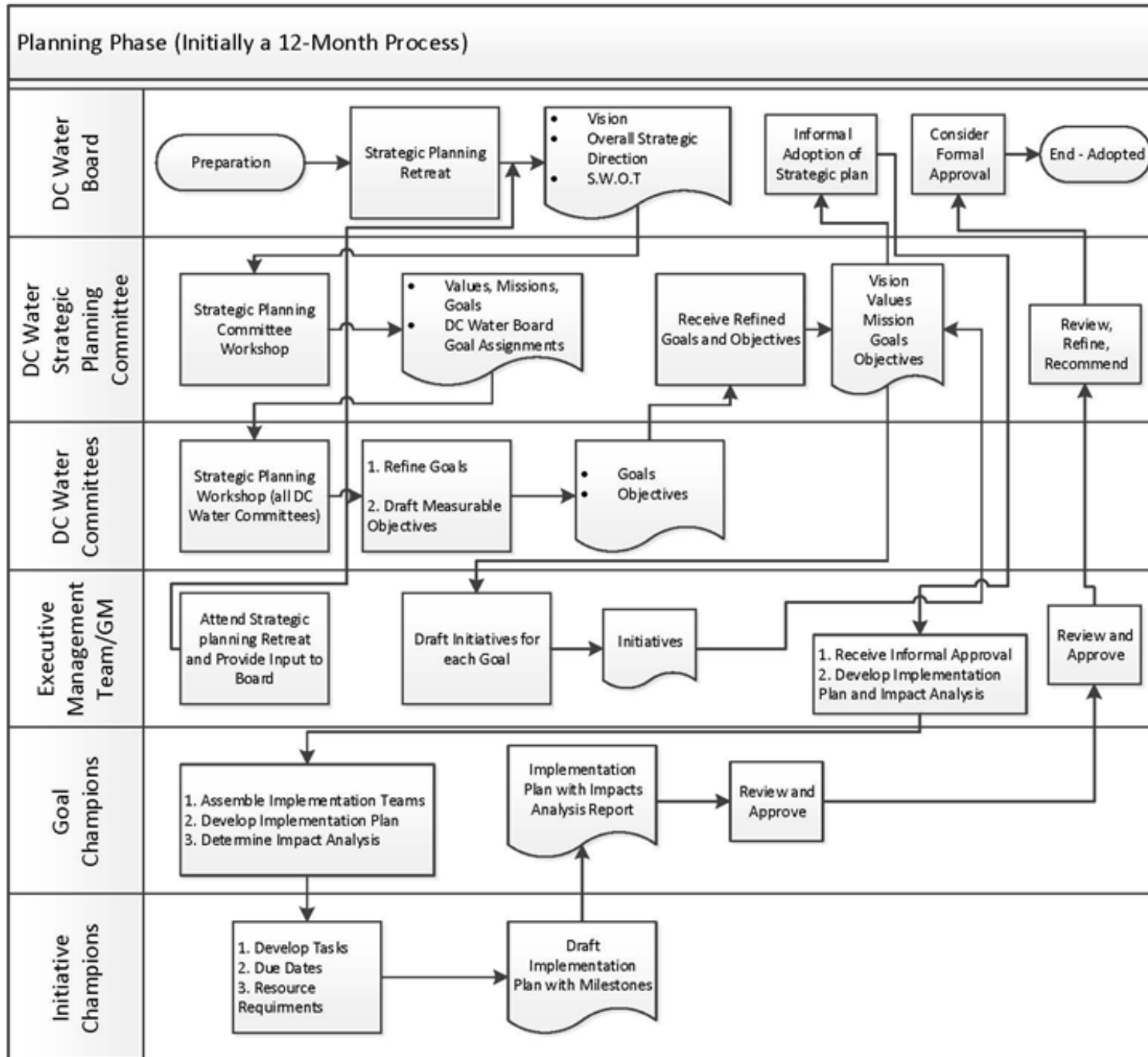
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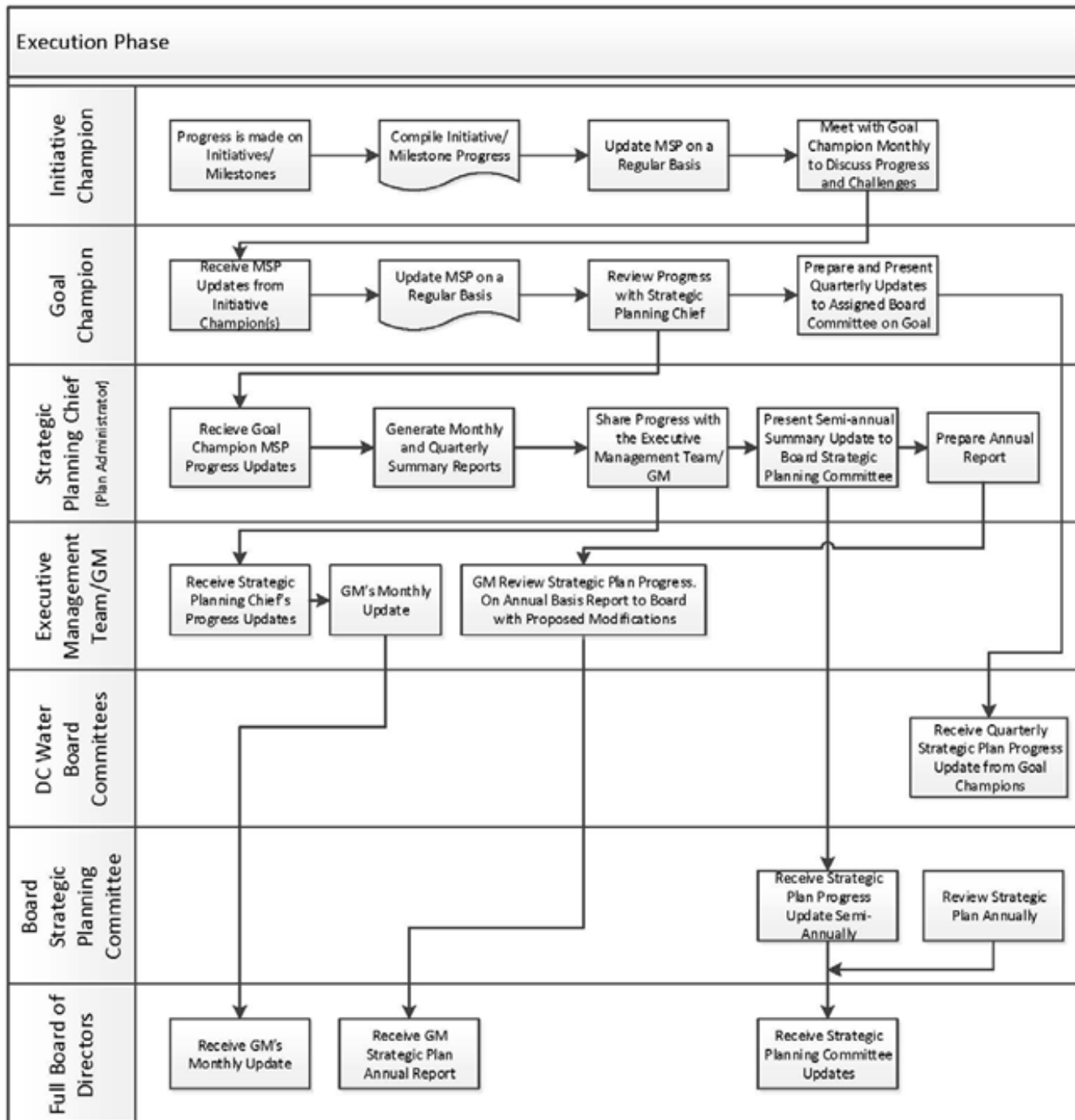
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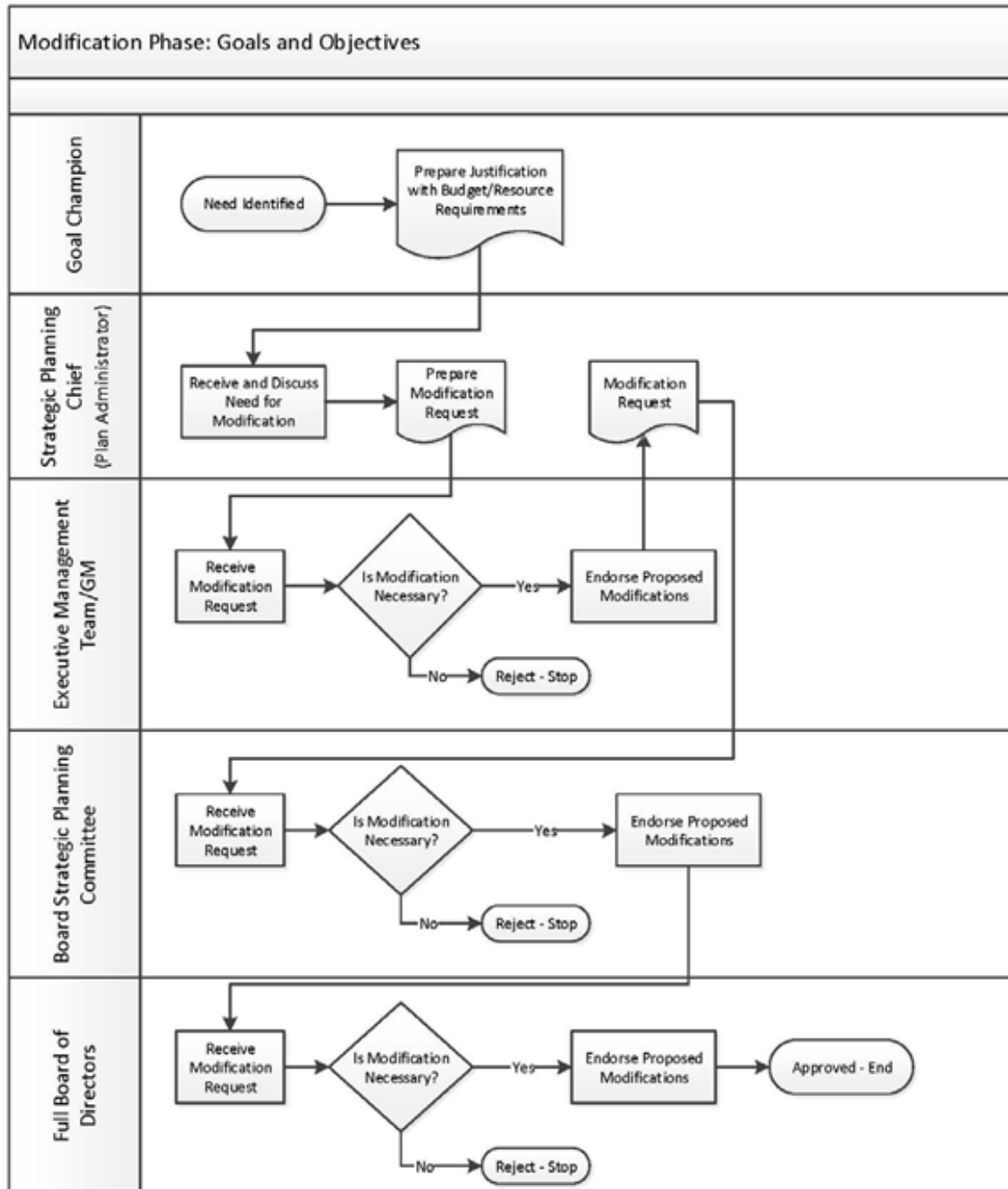


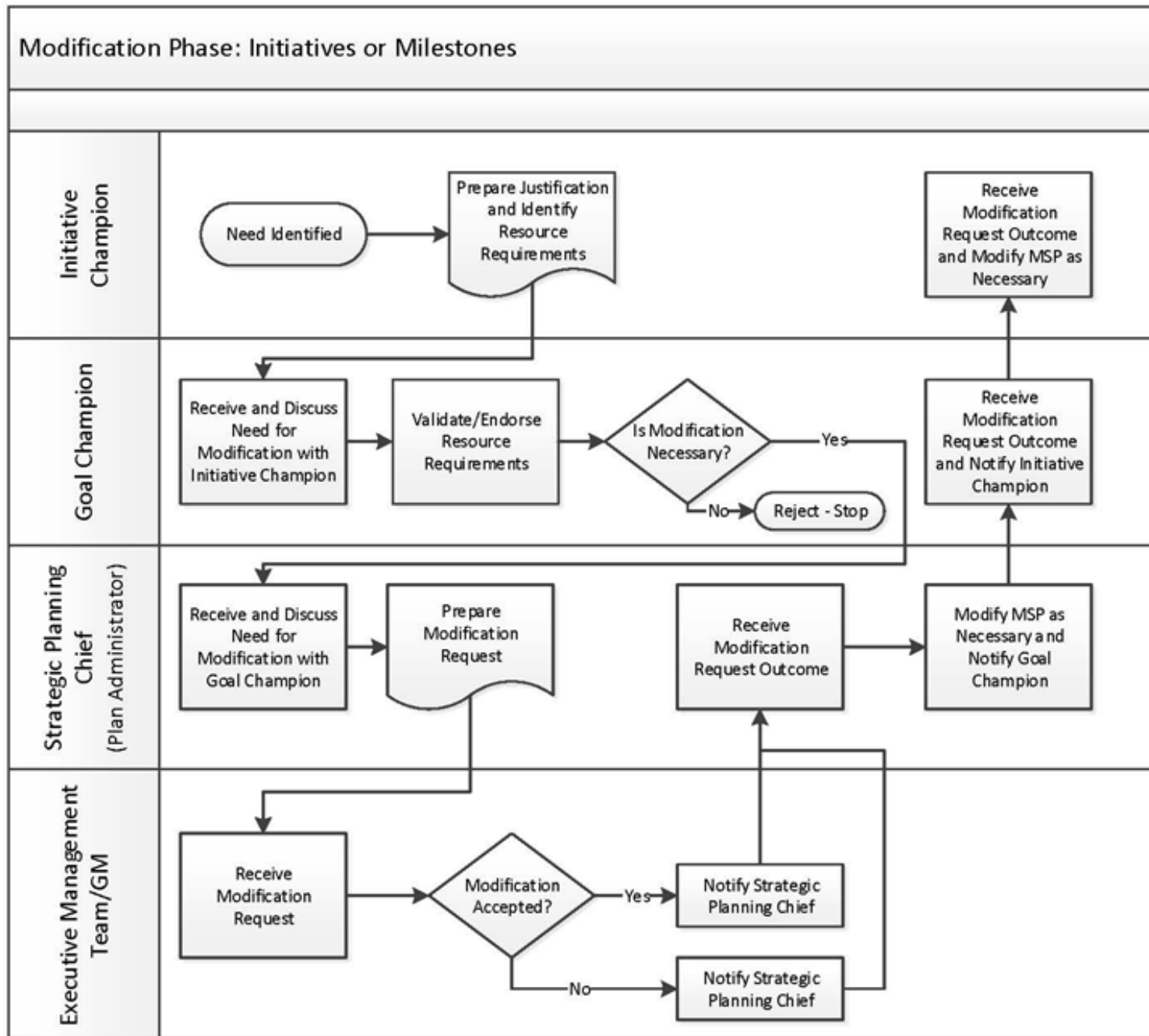




MSP: My Strategic Plan (cloud-based system)

Workflows (SOPs) Version 1/15/2014







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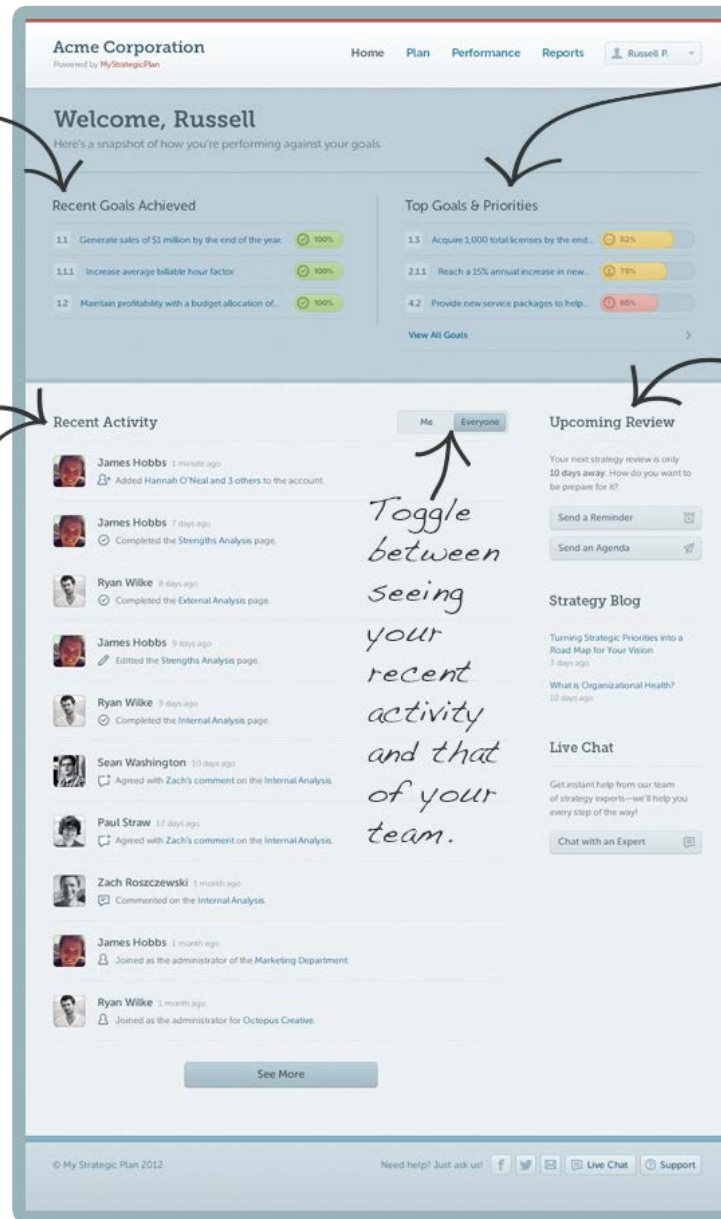
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Order	Goal	Owned By	Due Date	Status
1.1	8% growth of traditional youth as compared to 2012	Membership	Today	100%
1.1.1	2% growth in traditional youth in 2013 (4023) over 2012 (3945)	Membership	Tomorrow	92%
1.2	Attain an average retention goal of 72% for youth for the goal period	Membership	05/15/13	82%
1.3	Increase market share in Boy Scouts to an average of 14.5%	Membership	05/15/13	78%
1.3.1	Approach 15 organizations and start 2 new crews in each district.	Membership	03/15/13	65%
1.4	Attain retention rate of 67.5% as of 09/30/2013	Membership	05/15/13	45%
1.4.1	Recruit Webelos to Scout Transition chairman in each district	Membership	08/19/13	20%
1.4.2	Create survey to determine why Scout dropped out & call "lost scouts"	Membership	11/30/13	0%
1.5	Revamp marketing and sales kit to support venturing new unit drive	Membership	Today	50%
1.5.1	Have a membership program promotion display at 3 events	Membership	Tomorrow	0/5
1.5.2	Establish membership chairperson & structure in each district	Membership	05/15/13	0%
1.6	Attain Journey To Excellence			
1.6.1	30% Brotherhood completion			
1.6.1.1	Increase attendance			
1.6.1.2	Training provided to			
1.6.1.3	Maintain and increase			
1.6.1.4	Chapter Chief and C			
2.1	40% tool returned p			

Click on the pencil to update the progress all on one page - including dates, priority & ownership.

**1.1.1 Community Involvement: Establish a program that contributes 10% of net profit and staff time.**  
Last updated: Oct 29, 2013 at 9:54 PM

Not started / Not on target 70% / 10% (Invoices)

**James Hobbs** 20 mins ago  
Changed the status from In Progress to Off Target  
We're still collecting a list of eligible nonprofits.

**Recent Activity**

- James Hobbs** 1 month ago
  - Created the goal.
  - Changed the description.
  - Tagged the goal.
  - Assigned the task to 'You'.
- You** 1 month ago
  - Changed the description.

**Details**

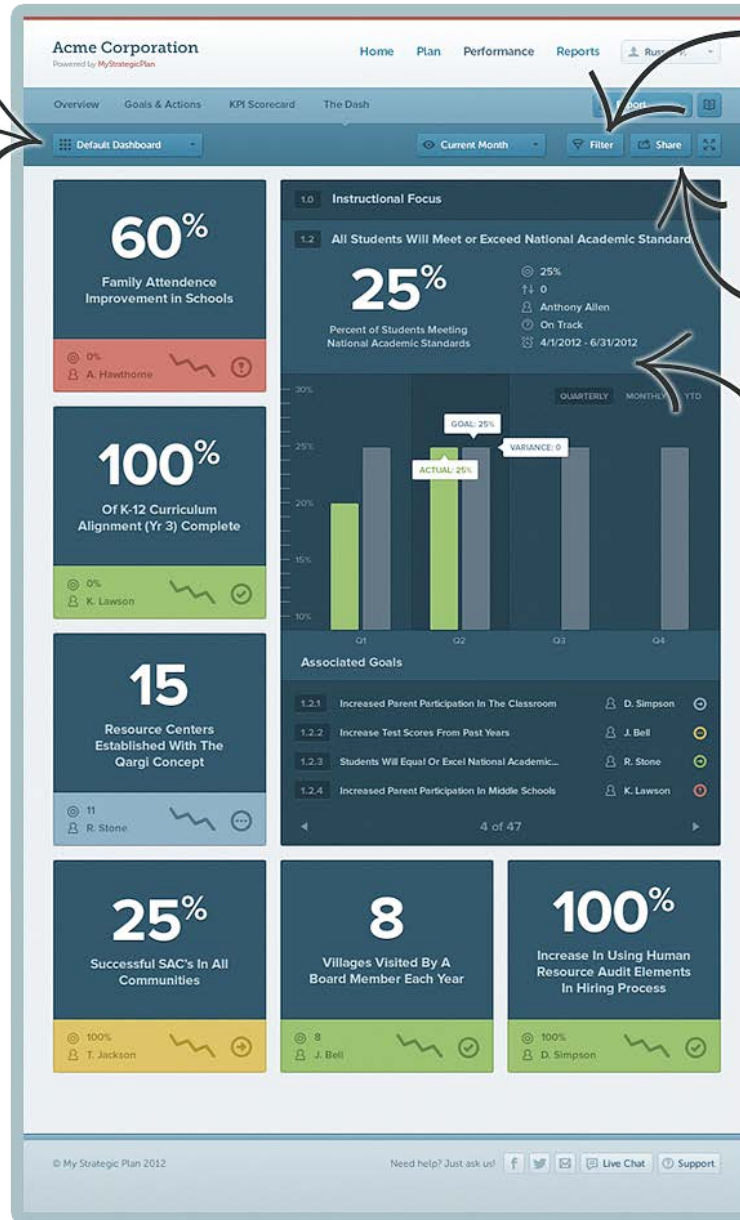
- Starting on January 5th, 2012
- Due on March 5th
- High Priority
- By James Hobbs
- For Ryan Wilke
- \$ in Sales
- Average

Everyone can leave comments.

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Filter and sort by organizational function, status and priority.

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Detailed view of performance by month, quarter and YTD.

# Performance Management

## Areas of Performance Management:

- Strategic Plan Initiatives – Milestones**  
(April 2013)
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# Training and Ongoing Support

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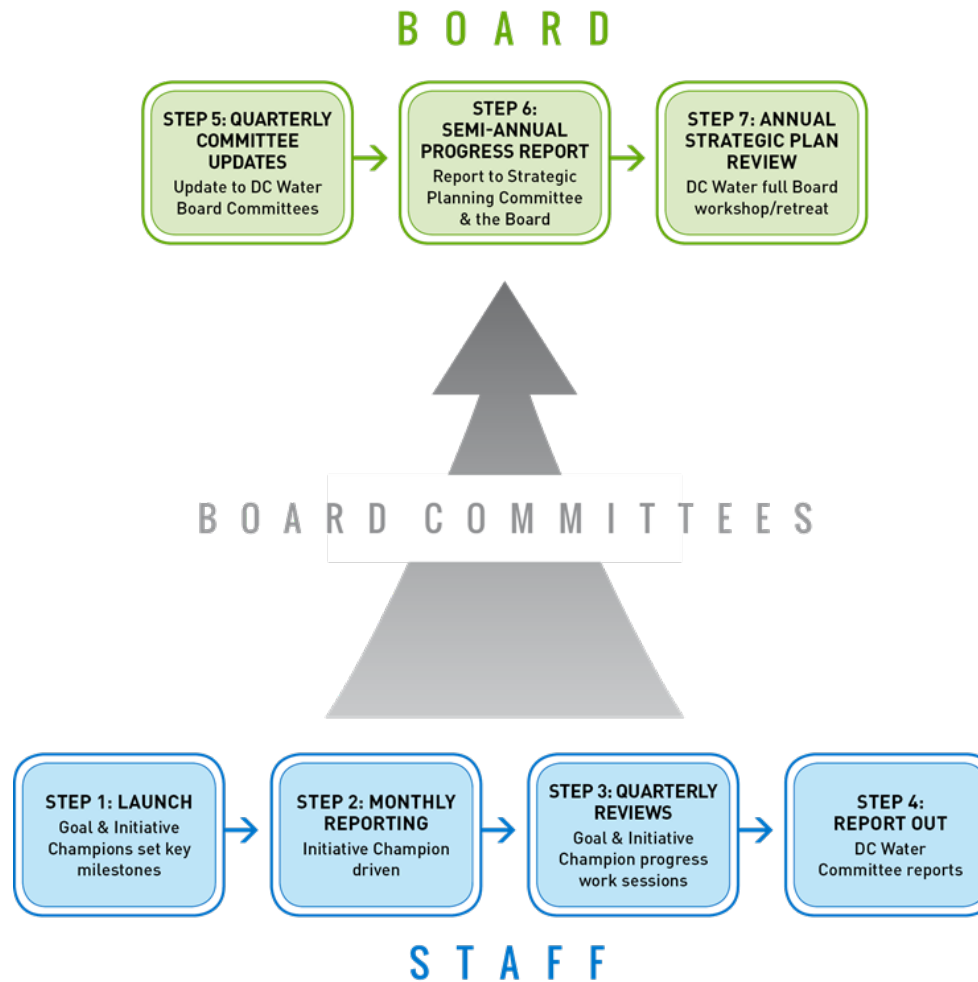
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# Reporting Process



## SAMPLE GM's STRATEGIC PLAN DASHBOARD

# When Fully Implemented



# APPENDICES

# WHAT IS DC WATER'S STRATEGIC DIRECTION?

## BLUE HORIZON 2020

Blue Horizon 2020 serves as a blueprint for future decision-making and provides a structure through which annual reviews can be accomplished to assure that the goals and objectives retain their relevance over time. By laying out a course of action, this plan represents a disciplined process for making fundamental decisions and shaping DC Water's future.

The plan represents the collaboration of the Board of Directors, Executive Management, and the management team, as well as input from key external stakeholders. The plan is designed to be a lasting framework, although updates should be made to goals, objectives, and initiatives as the organization moves forward and circumstances change.

This plan contains the DC Water vision, mission statement, values, goals, objectives, and initiatives. It addresses DC Water's current challenges and helps assure continued success in operations and management of resources and assets.

DC Water's vision describes the desired future state and guides the organization toward the future, while the mission of the utility describes the purpose of the organization and its role within the service area. Values articulate the deeply-held beliefs, norms, and qualities of the utility, and are the basis from which each DC Water staff member should operate.

## FOCUS AREAS

The strategic plan, and the accompanying strategic framework, is the direct result of evaluation and analysis of the elements of the environmental scan and the needs of key stakeholders represented by the DC Water Board. Early in the process, three key themes emerged, which are embodied in Blue Horizon 2020. These have been called focus areas and are:



### LEADERSHIP

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### VALUE

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### INNOVATION

DC Water will achieve international prominence in development and adoption of science, technology and processes in support of a culture of innovation.

## VISION — DESCRIBES AN ORGANIZATION'S DESIRED FUTURE STATE

To be a world-class water utility.

## VALUES — ARTICULATE ORGANIZATIONAL DEEPLY HELD BELIEFS

**Respect:** Serve with a positive attitude, courtesy, and respect that engender collaboration and trust.

**Ethics:** Maintain high ethical standards, accountability, and honesty as we advance the greater good.

**Vigilance:** Attend to public health, the environment, quality, efficiency, and sustainability of our enterprise.

**Accountability:** Address challenges promptly, implement effective solutions, and provide excellent service as a committed team.

## MISSION — DESCRIBES AN ORGANIZATION'S PURPOSE

Exceed expectations by providing high quality water services in a safe, environmentally friendly, and efficient manner.

## GOALS — DESCRIBES AN ORGANIZATION'S CORE STRATEGIES

The goals, presented on the following pages and the accompanying strategic plan framework, represent the core strategies that DCWater will pursue. The Board and Executive Management believe that they are essential for DC Water to become world class and achieve its mission.

## OBJECTIVES — DESCRIBES WHAT THE ORGANIZATION SEEKS TO MEASURE TO EVALUATE ACHIEVEMENT OF THE GOALS

Objectives are the strategic measures that will enable the Board and Executive Management to evaluate achievement of the goals. Some of the specific measures will need to be further researched and refined as the organization implements the plan and obtains additional insight and information.

## INITIATIVES — DESCRIBES HOW RESOURCES WILL BE ALLOCATED TO ACHIEVE OBJECTIVES AND GOALS

Initiatives are the allocation of resources (time and money) to achieve the objectives and the goals.

## MILESTONES — REPRESENTS SPECIFIC TASKS AND TARGET DATES BY WHICH THEY WILL BE ACCOMPLISHED IN SUPPORT OF INITIATIVES

Milestones are specific achievements of intermediate steps required for initiative implementation.



### WORLD-CLASS STATUS

A fundamental response to the challenges faced by utilities today is to cultivate innovation throughout the organization. The DC Water Board is committed to meeting the challenges of the future and leading the organization to world-class status. This encompasses everything from embracing groundbreaking new technologies and maintaining ongoing excellence in treatment and distribution, to evaluating performance and driving improvement in every area of the utility. The implementation of Blue Horizon 2020 will be critical in enabling DC Water to achieve its vision: To be a world-class water utility.

# CRITICAL SUCCESS FACTORS

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The Board and Executive Management discussed the following factors that are important to the long-term success of DC Water.

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## **IMPORTANCE OF COMMUNICATIONS AND OUTREACH**

Effective communication with the broad array of DC Water stakeholders should continue and be enhanced. DC Water is vital to the community and its importance should be clearly communicated.

## **INCREASING THE VALUE OF WATER**

Marketing water with the theme of “Water is Life” has been successful and should continue to be developed and enhanced. Rates for water utility services will necessarily increase as a result of increasing regulation, infrastructure, and customer service level requirements. However, it should be clear to all that the value of this resource far exceeds the costs to ratepayers.

## **ALTERNATIVE REVENUE STREAMS**

As a premier provider of water-related services, DC Water may be in a unique position to provide additional valuable services to customers, which may offset some otherwise necessary rate increases. These ideas will be identified, evaluated, prioritized and, if appropriate, implemented.

## **SUSTAINABILITY**

Sustainability is receiving increased attention from the water sector industry and DC Water should consider sustainability from a “triple bottom line” perspective (economic, environmental, and social sustainability).

## **EFFICIENCY**

DC Water commits to being an efficient operation that identifies and implements best practices, uses technology strategically, and develops and maintains an efficient and motivated workforce.

## **REGIONAL COOPERATION AND PARTNERSHIPS**

As a regional utility with a broad group of customers and stakeholders, DC Water will improve its operation by collaborating locally, regionally, and nationally to provide the best possible solutions for the benefit of its customers and communities.

