

City of Santa Fe Water

Strategic Plan

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City of Santa Fe Water

Strategic Plan for 2021-2023 - Executive Summary

Introduction – the Planning Process

This three year plan for calendar years 2021-2023 was developed by a planning team that included the City of Santa Fe Water (CoSFW) Director and Section Supervisors. This team met for six half- days between July and December of 2020 and used the services of a strategic planning consultant, Mark D. Bennett, Decision Resources to design the process and facilitate the discussions to encourage open, candid exchanges among differing perspectives.

We began our work by looking back at the last strategic plan completed in 2010. We did a comprehensive assessment of the outcomes from the plan, distilled lessons learned, and identified issues that continue to be relevant to CoSFW’s current operations.

Then, we broadened the planning team’s perspectives by reviewing the results of a strategic situation survey sent to 101 CoSFW Staff (19 responses) and a short public survey about preferences for communication (14 responses). The planning team also met twice with and engaged in one-on-one interviews with an extended planning team that included key community stakeholders and a range of City employees mostly from within CoSFW. Comments from these surveys and extended planning team meetings directly guided formulation of the 2021-2023 Strategic Plan.

Mission

The revised mission statement is shorter than previous versions, and focuses on the essence of WHY CoSFW exists.

Provide a safe, reliable, and resilient water supply to meet Santa Fe’s needs.

CoSFW believes that a safe, reliable, resilient water supply underlies the basic needs, quality of life, and prosperity of the City and its residents. The mission statement affirms three critical standards to guide our work: SAFETY; RELIABILITY; AND RESILIENCE.

Vision

CoSFW is unique in the State and Region as a municipal water utility with local surface water and groundwater resources as well as surface and groundwater resources imported from outside of our local watershed. In addition to this diverse supply portfolio CoSFW has a nationally acclaimed conservation program. Within this context, the long term vision of CoSFW is to

...continue to be a leader in the water industry, dedicated to operations, planning, communications, resiliency, and well supported staff for the benefit of our community.

Core Values

We have articulated four core values to guide us as we make key decisions that earn the trust of employees, customers, and community stakeholders. These values are to **act with integrity, support our workforce, maintain and plan for a resilient water system, and support water values across the community.** We further define each core value with several guiding principles as shown in the list on the next page.

- **Act with Integrity**

- We strive for transparency in our organization with open communication and public engagement.
- We maintain water user confidence by providing safe drinking water and a positive customer service experience.
- We value mutual respect between all people.
- We commit to being a high quality organization supported by ethical and professional standards that is financially accountable to our water users.

- **Support Our Workforce**

- We promote development of in-house expertise and sharing of institutional knowledge by breaking down barriers to teamwork and communication within the organization.
- We commit to providing adequate staffing, onboarding, succession planning, apprenticeships, mentorships, and opportunities for professional development and continuing education to build organizational efficiency.
- We believe in providing training and the necessary tools to ensure a safe work environment and set our team up for success.
- We measure and evaluate the performance of employees, supervisors, sections, and the division.

- **Maintain and Plan for a Resilient Water System**

- We value systematic monitoring and maintenance of current infrastructure function, and evaluation and optimization existing water resources.
- We continuously explore new opportunities and develop short, medium, and long range plans to guide our efforts in water conservation, water resources development, and infrastructure development.
- We value reliability, safety, and resiliency when considering water resources development opportunities, water conservation strategies, and infrastructure development possibilities.

- **Support Water Values Across the Community**

- We as members of the water community, strive to collaborate and/or develop partnerships with regional and local stakeholders to consider the environmental, social, educational and recreational benefits of our shared water interests.
- We as members of the water community, respect the historical and cultural values of water in Santa Fe.
- We as members of the water community, commit to maintaining the collective value of water conservation that has guided the community's past water use reduction, underlies current water use behavior, and will continue to guide us into the future.
- We as members of the water community recognize that agua es vida, and we must protect it as such for our grandchildren's grandchildren.

These core values and guiding principles represent promises. We recognize that we have room to improve in order to fulfill these commitments, and set them out as a challenge to the leaders, managers, and employees of CoSFW to raise the standards for City of Santa Fe Water.

3 Year Goals

The Mission, Vision, and Values are high level, aspirational, and relatively steady through time. These more constant elements were used to guide the creation of four major goals to guide us in our nearer future, specifically through 2023. It is through these goals, which are the heart of the strategic plan, that we connect our mission and values to the day-to-day operations of City of Santa Fe Water.

- Goal 1 – **WORKFORCE DEVELOPMENT** Provide support and motivation to a well-trained workforce
- Goal 2 - **INCREASE SYSTEM RELIABILITY, SAFETY, AND RESILIENCY** Meet future system demands and improve the ability to adapt and overcome challenges that threaten the function or stability of our system and resources
- Goal 3 – **COMMUNICATION** Improve our ability to communicate with the public, staff from other City departments, and within CoSFW
- Goal 4 - **STRENGTHEN ORGANIZATIONAL SYSTEMS** Foster CoSFW excellence through intelligent use of technology to plan, execute, and document programs and projects

Strategic Plan Implementation through Scorecards

CoSFW believes that for this strategic planning effort to impact our operations for the next three years, we must focus our efforts on a limited number of meaningful and measurable metrics for success which are reviewed periodically for progress and potential course correction.

CoSFW developed this set of measurable objectives based on our near term goals. These objectives include clear performance measures to assess our progress. We are using a “Scorecard” structure at the Division and Section levels to track these metrics and assign a score. This review and scoring will occur half way through and at the end of each Calendar year with an updated Scorecard developed each year. Each of the five sections that make up City of Santa Fe Water will have annual “Scorecards” for 2021, 2022, and 2023. These section Scorecards may be used in budget decisions and in laying out the Performance Appraisal and Development Plan (PADP) for individual staff members.

The performance measures set out in each scorecard have been developed with guidance from staff to link section level performance measures directly to the goals that define success on the overall City of Santa Fe Water Scorecard.

Scored Performance Measures

Here are the priority performance measures for each CoSFW division goal:

Workforce Development

- Develop and implement a formal onboarding process.
- Hours per year of safety training per staff member.
- Number of female new staff.
- Number of staff with up to date Performance Appraisal and Development Plan.

Increased System Reliability, Safety, and Resiliency;

- Annual groundwater storage change in zone of influence of City and Buckman Wellfields.
- Percent of budgeted CIP funds spent.
- Percent-unaccounted water.
- Main breaks per 1000 miles of pipe.
- Annual average per capita water use (GPCD).

Communication;

- Response time to emails from outside City of Santa Fe Water.
- Web based information availability.

Strengthened Organizational Systems

- Use of data dashboard by City of Santa Fe Water staff.
- Integration of AMP and work orders.
- Percent of infrastructure with as-built records.
- Difference between budget and actual expenses.

The management team will review the CoSFW scorecard semi-annually, celebrate our progress, learn from any difficulties, and adjust as necessary. Each section will also review its own scorecard semi-annually, update results, and report these to the CoSFW management team. All employees will receive updates on CoSFW and section results with the opportunity to ask questions, raise concerns, and share ideas. We believe this section level structure and transparent communication process will increase accountability and assure full, coordinated efforts to execute the strategic plan successfully.



To provide a safe, reliable, and resilient water supply to meet Santa Fe's needs.

MISSION

VISION

To continue to be a leader in the water industry, dedicated to operations, planning, communications, resiliency, and well supported staff for the benefit of our community.

VALUES



INTEGRITY We strive for transparency in our organization with open communication and public engagement. We maintain consumer confidence by providing safe drinking water and a positive customer service experience. We value mutual respect of one another. We commit to being a high quality organization supported by ethical and professional standards that is financially accountable to our rate payers.



WORKFORCE SUPPORT Teamwork, in-house expertise, and sharing of institutional knowledge throughout our organization. Adequate staffing, on-boarding, succession planning, apprenticeships and mentorships. Training, professional development, continuing education. Organizational performance indicators for evaluation of employee, supervisor, section, and division performance.



PLAN & MAINTAIN Explore new opportunities. Develop short, medium, and long range plans to address drought, regulatory changes, and environmental conditions to effectively manage our limited water resources. Consider storm water, gray water, wastewater and potable water as potential water resources. Develop and implement asset management and capital improvement plans to address aging infrastructure and system optimization needs.



COMMUNITY VALUES Collaborate and/or develop partnerships with local and regional stakeholder groups to consider the environmental, social, educational and recreational benefits of our shared water interests. Respect the historical and cultural values of water in Santa Fe. Maintain a collective value of water conservation while acknowledging the community's past water use reduction, addressing current needs and planning for the future.

GOALS

INCREASE SYSTEM SAFETY, RELIABILITY & RESILIENCY: Meet future system demands and improve the ability to adapt and overcome challenges that threaten the function or stability of our system and resources.

WORKFORCE DEVELOPMENT: Provide support and motivation to a well-trained workforce.

STRENGTHEN ORGANIZATIONAL SYSTEMS: Foster CoSFW excellence through intelligent use of technology to plan, execute, and document programs and projects



COMMUNICATION: Improve our ability to communicate with the public, with other City staff, and within CoSFW.

SAFE

RELIABLE

RESILIENT

City of Santa Fe Water: 2021 – 2023 Division Goals & Scorecard

City of Santa Fe Water Goals	3 year Performance Indicators Bold bullets will be scored. <i>Italic bullets will be tracked but not scored.</i>	2021 Section Scorecards Contribution	
Goal 1: Workforce Development			
Provide a safe workspace	<ul style="list-style-type: none"> • Minimum 10 hours of safety training per year for non-office staff with signed proof of training including acknowledgement that training will be followed by employee. • <i>Track Lost Time Injury Frequency Rate (LTIFR)</i> • <i>Track hours of safety training per year for office workers.</i> 	Scored indicators: BDD Eng SoS T&D WC Tracking only: BDD Eng SoS T&D WR	 Staff & Supervisor PADPs
Provide support and motivation to a well-trained and diverse workforce.	<ul style="list-style-type: none"> • Target 50% female Water hires. • <i>Track vacancy rates.</i> • <i>Track non-retirement attrition.</i> 	Eng WC WR BDD T&D SoS WC	
Improve training & professional development opportunities for staff	<ul style="list-style-type: none"> • 100% job related license/certification maintained. • Develop and implement a formal onboarding process. 	BDD Eng SoS T&D WC WR	
Improve management & leadership capacity	<ul style="list-style-type: none"> • Develop and initiate annual PADPs with a mid-year review. 	BDD Eng SoS T&D WC WR	
Goal 2: Increase System Reliability, Safety, and Resiliency			
Create groundwater sustainability metrics.	<ul style="list-style-type: none"> • Estimate annual and 5 year change in storage in zones of influence associated with City and Buckman Wellfields. (City Wells, NW Well, Buckman 1-9, Buckman 10-13) 	SoS WR	 Staff & Supervisor PADPs
Develop and implement an annual CIP and AMP.	<ul style="list-style-type: none"> • 75% of budgeted CIP funds spent in a given year. • <i>% projects in annual CIP completed on schedule.</i> • <i>% projects in annual CIP completed without change order (within budget).</i> • <i>Total AMP spending.</i> 	Eng T&D WR BDD Eng SoS	
Complete Master Planning for existing infrastructure in a timely manner.	<ul style="list-style-type: none"> • <i>Age of master plans and optimization studies (watershed, dams/reservoirs, CRWTP, City Wells, Buckman Wells, Transmission & Storage).</i> 	Eng WR	
Maintain operational quality.	<ul style="list-style-type: none"> • 100% Regulatory and Legal Compliance. • <7% Unaccounted Water. • < 50 main breaks per 1000 miles pipe and decreasing 5 year average in this metric. • <i>Track water quality parameters compared to a variety of standards.</i> • <i>Track water bill affordability (% of household income to water bill).</i> • <i>Track Cash reserves</i> • <i>Track water produced per employee (MG produced/# water division employee).</i> • <i>Track energy consumption per MG.</i> • <i>Track time required to get service from application date.</i> • <i>Track off-peak energy consumption as fraction of total.</i> 	BDD Eng SoS T&D WR BDD Eng SoS	
Maintain and improve water conservation across customer class	<ul style="list-style-type: none"> • 5 yr average GPCD decrease • <i>Track annual water savings to support below threshold water demand</i> 	WC WC	
Prepare for potential future supply and demand scenarios	<ul style="list-style-type: none"> • <i>Track age of Water Resource Plan and Conservation Plan.</i> • <i>Track Water Bank balances.</i> 	WC WR	

Goal 3: Communications				
Strengthen internal City of Santa Fe Water communication by breaking down information silos and expanding cross-functional training.	<ul style="list-style-type: none"> • Create annual all-staff survey with questions on effectiveness of internal communication and monitor results. • <i>Track staff attendance at expanded Water Division monthly meeting and April “What’s Up at Water” update webinar to community.</i> 	Eng WR	←	Staff & Supervisor PADPs
Strengthen internal Public Utilities Department and City of Santa Fe communication	<ul style="list-style-type: none"> • Provide 1 business day response time for calls and emails. 	Eng SoS WC WR	←	
Strengthen external communication by providing customer service web-based information availability and public outreach.	<ul style="list-style-type: none"> • Increase web based information availability. • <i>Track tickets from customer service and constituent services to Water.</i> • <i>Complaints/1,000 accounts.</i> • <i>Time for Water to resolve/respond</i> • <i>Track website usage statistics.</i> • <i>Track age of website content.</i> • <i>Track # of staff presentations at technical conferences.</i> • <i>Track response time for external calls and emails.</i> 	BDD Eng SoS T&D WC WR Eng SoS T&D WC WR	←	
Goal 4: Strengthen Organizational Systems				
Efficient use of best available technology.	<ul style="list-style-type: none"> • Expand use of “dashboard” by Water staff. • Digital integration/linking of Asset Management Plan and work orders to improve maintenance record keeping and quality of GIS DB • <i>Track use of digital work orders by Water staff</i> 	BDD Eng WC WR	←	Staff & Supervisor PADPs
Documentation, record keeping, and file organization.	<ul style="list-style-type: none"> • Increase % of infrastructure with as-built records. • <i>Track # files and total data storage on central Water server.</i> 	Eng Eng SoS WC	←	
Effective program/project management.	<ul style="list-style-type: none"> • Reduce difference between original budget and actual expenses • <i>Track external funding secured.</i> 	Eng SoS T&D BDD WR	←	

Recommendations for Successful Implementation

Prepared by Mark D. Bennett Decision Resources, Inc. 12-20

Context CoSFW has made an investment in the 2020 strategic planning process. In order to benefit from this investment, CoSFW leadership must lead implementation with a consistent shared message on the plan and the intended results. A shared strategic framework sharpens and strengthens collective focus with two key messages: “We know where we are going” and “We know how to get there together.” Strategic plans can fail to provide a solid return on the investment if they become static documents on a shelf. The day-to-day *whirlwind of urgencies* push the major goals and objectives aside. Leaders will turn this document into a *living plan* when you reference it regularly and adapt to changing conditions. Your planning will evolve to leverage limited resources for maximum mission impact. The following action principles are designed to help keep you on course.

1. Embrace the Mission, Values, and Guiding Principles Together, these are the *heartbeat* of the organization, the driving force for the work over time. WHY you exist and WHY your work is important must be clearly communicated as a steady signal. Members of the leadership team must be unified in this understanding so they can consistently communicate CoSFW’s direction and the essentials of its work to employees, city government partners, and community stakeholders. Every key decision provides an opportunity to demonstrate leadership’s commitment to the declared values and principles. **ALIGN!**

2. Follow Through With the Scorecard Approach to Remain Results Oriented Work within your current capacity. Be disciplined and avoid taking on too much. Develop meaningful performance indicators for each goal with a current benchmark for each indicator and the means to track changes over a realistic time period. Incorporate this information into regular plan reviews. These indicators demonstrate accountability and stewardship. For large goals, you may need to develop key objectives that are **S**.pecific, **M**.easurable, **A**.chievable, **R**.elevant/**R**ealistic, and **T**.ime-bound. A clear destination will inspire shared effort and *pull* CoSFW forward. **MEASURE!**

3. Review and Course Correct Monitor the major objectives frequently in scheduled quarterly (semi-annual at least) reviews at the appropriate levels (Division and Section) to assure execution and accountability. Changing conditions may require more dialogue about plan progress and direction. Do not allow changed circumstances to derail your efforts. **ADAPT!**

4. Align Everyone With the Vision Use the one-page, blueprint to summarize the major plan elements, including the core values and guiding principles. Integrate this blueprint with CoSFW’s operations and communications. Orient new employees to this vision.

Clear *line-of-sight* of the path from the current state to the shared vision builds a healthy consensus with a cohesive sense that “we are in this together.” **IMAGINE!**

5. Provide Construction Feedback Be candid about setbacks and where possible turn them into shared lessons that help move CoSFW closer to the vision. Use small and large victories to affirm progress, increase optimism, and (re)connect everyone to the larger effort. **CELEBRATE!**