In January and February 2020, the Northeast Ohio Regional Sewer District’s Chief Executive Officer held meetings with Senior Staff and several high-level managers to provide updates concerning the 2019-2021 Strategic Plan. In addition, Senior Public Information Specialist J. Elting held meetings with several Senior Staff members independently of the Chief Executive Officer, continuing through mid-February.

Overall, the majority of the team’s Tactics are on target, including schedules (with modifications), budget, and/or milestones; any identified risks or issues are minimal or non-existent. However, there are several Human Resources-related Tactics, particularly those related to Diversity & Inclusion initiatives, in the “Workforce Planning and Investment” Strategic Areas of Focus remain classified as “yellow.” These specific Tactics are outlined in the appropriate sections below.

Many Tactics in the 2019-2021 Strategic Plan have been successfully completed in 2019. These are listed in the appropriate sections below; beginning with the Q1-2020 Quarterly Update (deliverable due April 2020), these will be hidden rows in the accompanying spreadsheet, visible only as selected.

### Strategic Area of Focus
Customer and Community Connections: *internal and external engagement and service*

**Objective: Assist member communities to address their Clean Water Act issues**

One of Director Marshall’s Goals is to provide communities with data and project recommendations through completion of the local sewer system evaluation studies (SSES). As previously reported, the MCI/Combined LSSES will not be complete by the end of 2019 as planned; therefore, the Tactic “Complete MCI/Combined LSSES by end of 2019” has updated to “Complete MCI/Combined LSSES by end of 2020.” *(D. Marshall)*

All other Tactics are on track.

**Objective: Optimize our ability to advance community Objectives**

One of Director Haqq’s Goals is to establish a visual brand that will be consistently applied throughout NEORSD. One Tactic associated with this Goal, “Design key elements of the brand and share widely for feedback in 2019,” is complete. A roll-out plan for this project is currently being developed. The revised brand will soon be shared with Senior Staff and the new brand should be ready for roll-out mid-2020. *(C. Haqq)*

All other Tactics are on track.
**Strategic Area of Focus**

**Environmental Protection and Sustainability: water quality and resource management**

**Objective:** Expand water quality focus to increase benefits to the region's waterways

One of Director Greenland’s Goals is to identify culverted streams for potential future NEORSD ownership / responsibility by the end of 2020. These have been identified and, except for fewer than four miles of CSO culverted streams in suburban communities, discussions have taken place and decisions have been made. This Tactic has been marked as complete. *(F. Greenland)*

All other Tactics are on track.

**Objective:** Increase opportunities to improve resource management through sustainability practices.

All Tactics are on track.

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**Strategic Area of Focus**

**Financial Viability: cost and value of clean water**

**Objective:** Explore new ways to enhance long-term financial planning that optimize ability to provide sewer and stormwater services with minimal impact on rates.

All Tactics are on track.

**Objective:** Develop future business opportunities to optimize operations and better serve member communities

One of Manager Wasko’s Goals is to improve the understanding of risk in shaping decision-making and results across NEORSD programs. Last quarter, per his request, the Tactics associated with this Goal were reclassified as yellow due to delays in selecting and implementing a risk management technology solution to streamline his processes. Although he is continuing to analyze information from previous risk assessments (2005-2014) needed to set the audit plan for the next two years, these Tactics will remain classified as yellow. An update is expected mid-second quarter 2020. *(J. Wasko)*

All other Tactics are on track.

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**Strategic Area of Focus**

**Operational Excellence: sewage and stormwater management**

**Objective:** Implement Operational Readiness Plan to support evolving operations and maintenance

One of Deputy Chief Reichlin’s Goals is to reduce utility and chemical consumption. One Tactic associated with this Goal, “Evaluate system and component performance at Southerly, optimize mercury scrubber operations,” is complete. *(D. Reichlin)*
One of Chief Bunsey’s Goals is to improve maintenance efficiency and effectiveness across facilities. One Tactic associated with this Goal, “Successful transition of REF instrumentation from Contract 119-80% of PMs on time EOQ3; Baseline District / 1199 cost ratio EOQ3,” is complete. A second Tactic associated with this Goal, “Perform audit, baseline and PMs for instruments at District facilities (excluding REF),” has been reclassified as yellow due to recent staff retirements and difficulty filling open positions. However, this Tactic is expected to return to green status in the next quarterly report. *(J. Bunsey)*

One of Deputy Director Phelps’s Goals is to instill culture of continuous improvement across facilities. One Tactic associated with this Goal, “Control grease buildup on primary tanks,” is complete. *(T. Phelps)*

All other Tactics are on track.

**Objective: Implement technologies and processes that improve business efficiency and effectiveness**

One Tactic associated with this Goal, “Complete SharePoint upgrade by end of 2019,” remains classified as yellow. In addition this Tactic will be reassigned to Chief Bunsey as Manager Keen no longer reports to Director Marshall. *(J. Bunsey)*

Action Item ➔ Specialist Elting will follow-up with Manager Keen to better understand the current status of this project and will provide a revised Tactic in the next quarterly report.

All other Tactics are on track.

**Objective: Fully implement management process to support successful delivery of the Regional Stormwater Management Program**

All Tactics are on track.

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**Strategic Area of Focus**

**Workforce Planning and Investment: employee and leadership development**

**Objective: Expand workforce planning strategies top meet current and future business needs.**

One of Director Foley’s Goals is to “Enhance Operations & Maintenance staffing plan.” One Tactic associated with this Goal, “Ensure that training records for O&M employees are stored centrally,” has been re-classified as “yellow.” This is due to the delays in selecting and implementing the new Enterprise Content Management software. A request to issue RFP/RFQ for the Enterprise Content Management Assessment and Implementation Project has been approved by the Consultant Review Committee; however, Chief Luckage would like to wait until the new Legal Operations Manager has been hired so that he/she can be part of the selection process. *(F. Foley)*

All other Tactics are on track.

**Objective: Strengthen diversity and inclusion to increase understanding and confirm continues commitment across the organization.**

One of Director Haqq’s interim Goals is to “Become active champions committed to the principles and practices of diversity and inclusion.” One Tactic associated with this Goal, “Deploy diversity and inclusion
education for the workforce with cascading principles of linked to the Executive Thought Leadership Series for the Senior Staff Team,” has been upgraded to “green.” Executive Thought Leadership has been completed but the rollout of cascading principles is still an ongoing project. (C. Haqq)

One additional Tactic associated with Director Haqq’s aforementioned Goal remains yellow. It is:

- Integrate accountability for executing D&I practices into performance goals.

Another of Director Haqq’s interim Goals is to “Attract, develop, and retain high-performing, talented employees with diverse backgrounds and perspectives.” Two Tactics associated with this Goal, “Use workforce analytics on individual, group and organizational patterns and trends of recruitment and hiring and promotion of employees to execute inclusive recruitment strategies” and “Showcase employees who have grown into leadership positions at the District from internship assignments” remain yellow.

Another of Director Haqq’s interim Goals is to “Implement an integrated communication plan that informs all employees and customers and promotes diversity and inclusion efforts.” Three Tactics associated with this Goal, “Develop and produce an annual D&I report that broadly communicates the District’s strategic focus on D&I successes, challenges and opportunities, and articulates how the D&I strategic focus is tied to employer value and bottom-line business results,” “Create press releases to share diversity news, business impact stories, and community recognition with local, regional and national media outlets” and “Integrate diversity and inclusion language into all advertisements, speeches, addresses, and public relations opportunities for all organizational leaders” remain yellow.

All other Tactics are on track.

**HOT TOPIC DISCUSSION**

Senior Public Information Specialist J. Elting is scheduled to present a Strategic Plan 2019-2021 Update to Senior Staff Team on Wednesday, February 12, 2020.

This quarter’s “Hot Topic Discussion” falls under the Operational Excellence Strategic Area of Focus.

**Goal:** Apply sustainable practices to increase efficiencies and control costs associated with the largest expenditures, including utilities and solids handling.

**Tactic:** Identify key areas to study and identify ways to proactively address changing costs.

Manager McGing has been working with Information Technology and Customer Service to automate the certification process to not only streamline the process but allow the Sewer District to certify accounts more frequently, resulting in increased revenues from previously unpaid balances. Manager McGing and Analyst Gecaj will provide a brief demonstration of the Oracle Analytics cloud-based tool used to determine which accounts should be certified.

**FOLLOW UP**

Specialist Elting plans to attend CEO Departmental Meetings (and others as needed) in April 2020.