In July and August 2020, the Northeast Ohio Regional Sewer District’s Senior Public Information Specialist J. Elting held meetings with Senior Staff members to provide updates concerning the 2019-2021 Strategic Plan. The Sewer District continues to adapt to the changing realities of the coronavirus pandemic, and staff has been diligent in continuing to succeed with target goals. Many of the Tactics previously identified as “yellow” have been adjusted to “green,” but issues related to COVID-19 have delayed some Tactics and those are reclassified as “yellow.”

Many Tactics in the 2019-2021 Strategic Plan have been successfully completed in this quarter. These are listed in the appropriate sections below. In addition, a new feature has been added to this report to visually show the percentage of Tactics that have been completed. Keep in mind that each department has different Objectives, Goals and Tactics – some are qualitative whereas others are quantitative – and completion rate is not an indication of department “success.”

Overall, the majority of the teams’ Tactics are on target, including schedules (with modifications), budget, and/or milestones; any identified risks or issues are minimal or non-existent.

**Strategic Area of Focus**

**Customer and Community Connections: internal and external engagement and service**

**SUMMARY: 27 Tactics**

![Chart showing Tactics completion status]

**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). One Tactic, “Complete HHI LSES by end of Q1 2019,” has been completed. The remaining three Tactics within this Goal, “Complete MCI/Combined LSES by end of 2020,” “Complete SWI LSES by mid-2021” and “Complete CVI LSES by end of 2021” are delayed due to factors including cash flow constraints and COVID-19 schedule impacts.

*(D. Marshall)*
All other Tactics are on track.

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

One of Chief Administrative Officer Haqq’s Goals is to develop an ongoing customer feedback mechanism to gauge satisfaction. One Tactic, “Select a software system and install that will allow customers to provide immediate feedback after a customer service call in 2018,” has been fully implemented and Salesforce continues to work smoothly. This Tactic can be marked as completed. *(C.Haqq)*

All Tactics are on track.

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**Strategic Area of Focus**

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

**SUMMARY: 28 Tactics**

- **On Track**: 26
- **Issues/Delays**: 2
- **Off Track**: 0
- **Complete**: 0

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

All Tactics are on track.

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

One of Manager Fechik-Kirk’s Goals is to improve resource management to reduce the costs and environmental footprint of NEORSD operations, including waste, purchased supplies and utilities. Three of these Tactics related to energy use and energy use intensity – total electricity and natural gas overall as well as that required for wastewater treatment – have been modified to show comparison to a 2014 baseline, not 2016. They are all on track. *(M. Fechik-Kirk)*

All Tactics are on track.
SUMMARY: 33 Tactics

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

Chief Financial Officer Duplay is continuing to monitor financials for potential COVID-19 impacts, but all key metrics are on target. (K. Duplay)

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. The Tactics associated with this Goal are now classified as “green” as the Risk Management Plan has resumed. Manager Wasko is currently working with the C-Suite to develop a sustainable risk assessment, and working groups will be formed. A brief update will be provided at the Strategic Plan 2019-2021 Q2 Update Meeting to Senior Staff. (J. Wasko)

One of Director Marshall’s Goals is to evaluate opportunities for handline and processing solids from external sources. One Tactic, “Complete District-wide solids handling study by end of Q2 2020” is complete. Another of Director Marshall’s Goals is to evaluate cost-effective opportunities to provide an increased level of service to the local collection system as capital improvement projects are advanced. One Tactic, “Consider opportunities when developing the final scope and budget for the design of the Shoreline Consolidation project,” targeted for the end of 2019 or beginning of 2020, is now complete. (D. Marshall)

All Tactics are on track.
Objective: Implement Operational Readiness Plan to support evolving operations and maintenance

One of Chief Bunsey’s Goals is to improve maintenance efficiency and effectiveness across facilities. One Tactic associated with this Goal, “Perform audit, baseline and PMs for instruments at District facilities (excluding REF),” remains classified as “yellow” due to recent staff retirements, difficulty filling open positions and reduced staffing due to COVID-19. Previous reports indicated an expectant completion by the end of 2020, but this project may continue into 2021. (J. Bunsey)

One of Deputy Director Reichlin’s Goals is to reduce utility and chemical consumption. One Tactic associated with this Goal, “Evaluate electrical curtailment and provide BCE; evaluate/implement opportunity with NRG for electrical curtailment utilizing generators,” is complete. Another Tactic, “Evaluate system and component performance at Southerly: optimize heat recovery from steam recovery,” has been reclassified as “yellow” due to procurement issues. The installation of the new steam traps were delayed due to COVID-related issues at the manufacturing facility. They are now being installed and a kickoff meeting has been scheduled for Q3. (D. Reichlin)

One of Deputy Director Phelps’s Goals is to instill a culture of continuous improvement across facilities. One Tactic associated with this Goal, “Perform RCFA on economizer tube leaks,” has been completed. (T. Phelps)

All other Tactics are on track.

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

Another of Chief Bunsey’s Goals is to evaluate improved Operations & Maintenance information technology and control system applications and migrate to such systems as appropriate. One Tactic associated with this Goal, “Successfully implement PDMS” has been completed. However, another Tactic associated with this goal, “Identify equipment to facilitate remote site inspections and monitoring (i.e. cameras, etc.),” is on hold due to staffing and resource issues and has been reclassified as “yellow.” (J. Bunsey)
Objective: Fully implement management process to support successful delivery of the Regional Stormwater Management Program

All Tactics are on track.

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

All Tactics are on track.

Strategic Area of Focus
Workforce Planning and Investment: employee and leadership development

SUMMARY: 27 Tactics

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

One of Director Brooks’s Goals is to enhance staff development and career path development for all departments. One Tactic associated with this Goal, “Integrate job shadowing and mentoring information into succession planning process,” is on hold as the mentoring program has not been as successful as anticipated. This has been reclassified as “yellow” until a determination can be made whether a shift to more of a “coaching program” would be a more suitable approach. This will be a critical component to each department’s DE&I goals. (E. Brooks)

All other Tactics are on track.

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

All Tactics are on track.

HOT TOPIC DISCUSSION

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

The “Hot Topic Discussion” for this quarter will include an update from Manager Wasko pertaining to his Goal of improving the understanding of risk as decisions are made across the organization.
The Tactics associated with this project are:

**Strategic Area of Focus**: Financial Viability

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

**Goal**: Improve the understanding of risk in shaping decision-making and results across NEORSD programs.

**Tactics**:

- Confirm objectives against common enterprise risks.
- For established objectives, identify risks and risk owners.
- Measure likelihood and impact for identified risks.
- Establish risk appetite and risk management strategies for most relevant risks.

**FOLLOW UP**

Specialist Elting plans to attend CEO Departmental Meetings in early October 2020.