

**Current and Future SBP - Approach to Updating and Adding Components**

October 2019

<b>Current Strategic Business Plan (2018-2023) Components</b>	<b>New Strategic Plan (2021-2026): <i>What is happening with the Plan components?</i></b>
<p>Mission, Vision, Core Values</p> <ul style="list-style-type: none"> <li>• Not in Plan (although these were reviewed and discussed with the Panel during the last strategic planning process)</li> </ul>	<p>SPU’s Mission, Vision and Core Values are being re-worked in a December 2019 staff work session. Planning for that session includes an in-depth discussion about the future of the Utility. The results will be shared with Panel in January.</p> <p>Oct 21 Panel “situational assessment” exercise provides an opportunity to provide advance input on these items from Panel. The workshop includes elements of a SWOC as part of the discussion.</p>
<p>Focus Areas</p> <ul style="list-style-type: none"> <li>• Customer Experience</li> <li>• Workforce Development</li> <li>• Operational Excellence</li> <li>• Public Health and the Environment</li> </ul>	<p>The new plan will include similar focus areas that will be integrated and aligned with the Accountability and Affordability Plan, Risk and Resilience Framework, and the Engagement and Empowerment Plan.</p> <p>A workshop with leadership across SPU is planned for January 2020 and results will be shared with the Panel in late January or early February.</p>
<p>Goals</p> <ul style="list-style-type: none"> <li>• Achieving excellence in core service delivery</li> <li>• Increasing affordability and accountability</li> <li>• Improving investment value</li> <li>• Enhancing public health and environment</li> <li>• Ensuring equity and inclusion</li> <li>• Expanding impact through strong partnerships</li> </ul>	<p>Goals will be revised, integrated and grouped with the Focus Areas and the Accountability and Affordability Plan, Risk and Resilience Framework, and the Empowerment and Engagement Plan.</p> <p>A workshop with leadership across SPU is planned for January 2020 and results will be shared with the panel in late January or early February.</p>
<p>Action Plans</p> <ul style="list-style-type: none"> <li>• The Plan included 12 action plans, and identified the 6-year cost of each.</li> </ul>	<p>The new Plan will include an implementation plan that integrates current and planned initiatives.</p>
<p>Rate Path</p>	<p>The new plan will include a rate path for 6 years. The first three years are a firm commitment—the plan is updated at the end of the 3<sup>rd</sup> year.</p>

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	<p>SPU is committed to a rate path that does not exceed the current rate of growth (5%/year) through 2026.</p>
<p>Voice of the Customer and Community Outreach</p> <p>Included two phase outreach – polling, meetings, used to identify customer priorities and then reaction to the draft plan and rate path.</p>	<p>SPU will use both recent polling data and targeted community outreach as part of the new plan. Outreach will focus on underrepresented communities, commercial customers, and small businesses.</p>
<p>Performance Metrics</p> <ul style="list-style-type: none"> <li>• Not in plan, but metrics are in place for tracking performance on the initiatives and service levels generally.</li> </ul>	<p>Add to new plan</p>
<p>Other: HDR Benchmarking study, efficiencies study</p> <ul style="list-style-type: none"> <li>• Not in Plan, but part of development of the plan.</li> </ul> <p>Schedule</p>	<p>Other: Several HDR recommendations from the study have been acted on. The Accountability and Affordability Plan provides the framework and actions for ongoing efficiencies and improvement within the utility.</p> <p>We will provide a briefing on both the HDR Benchmarking study and the Accountability and Affordability Plan.</p> <p>The Panel Chair &amp; Co-Chairs have requested the Utility reconsider the timeframe for the Plan in December, to see if we can adequately process all the information in time for a May 2020 submittal to the Mayor with an August transmittal to Council.</p>