



**CHARLOTTE WATER'S**

# **Foundation FOR THE Future**



CHARLOTTE  
**WATER**

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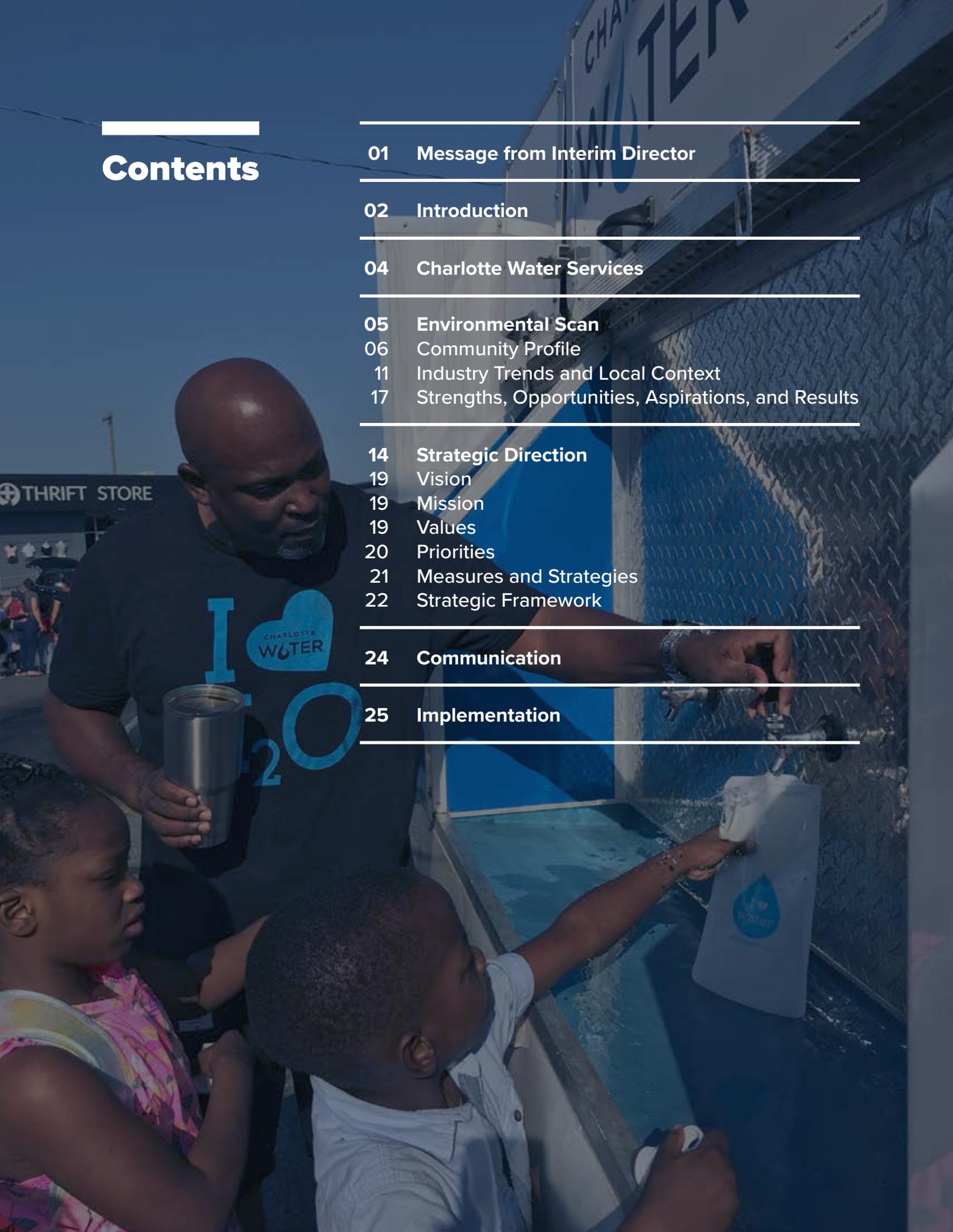
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# Message from Interim Director



**Equity. Sustainability. Resilience.** It should be no surprise that these are the main focus areas for the City of Charlotte as it continues to grow and flourish as a richly diverse community. I would say that very few services provided by the city have as much influence over these focus areas as access to water. That's why our strategic plan is so critical to our community and our success.

Equity, from a water service standpoint, means equal access to clean water for all. Over the next five years, Charlotte Water will allocate significant resources to ensure our water is accessible to all by prioritizing affordability and regional efforts. This will require a higher level of engagement and interaction with our partners than ever before to ensure our policies, plans, and solutions don't just meet our needs, but the varying needs of our diverse and growing community.

Speaking of growth, providing sustainable services has always been a part of our core purpose. Charlotte Water will continue to prioritize protecting and extending the life of all our resources, whether they be natural, human, financial, or operational. This will require more innovative thinking and vision to ensure we see and anticipate new challenges on the horizon.

Finally, we must assure our resiliency—not just operations resilience, but workforce resilience. This will require truly investing in our infrastructure to ensure the system we have in place is one that can meet the growth pressures of today and the unexpected challenges of tomorrow. We must also invest in people—including the staff we have now and the leaders we need for the future. That means creating a workplace that engages and attracts top talent and prepares and empowers them to be current and future stewards of all our resources.

Communication is at the heart of all of this. We must prioritize internal and external communications to build our team and our relationships with the communities we serve. As our Foundation for the Future, this plan equips us with the right information and the best approach to seize these opportunities and move Charlotte Water forward. I am excited for us to begin this work and I have full confidence we will succeed together.

A handwritten signature in black ink, appearing to read 'David Czerr'. The signature is fluid and cursive, written over a light blue horizontal line.

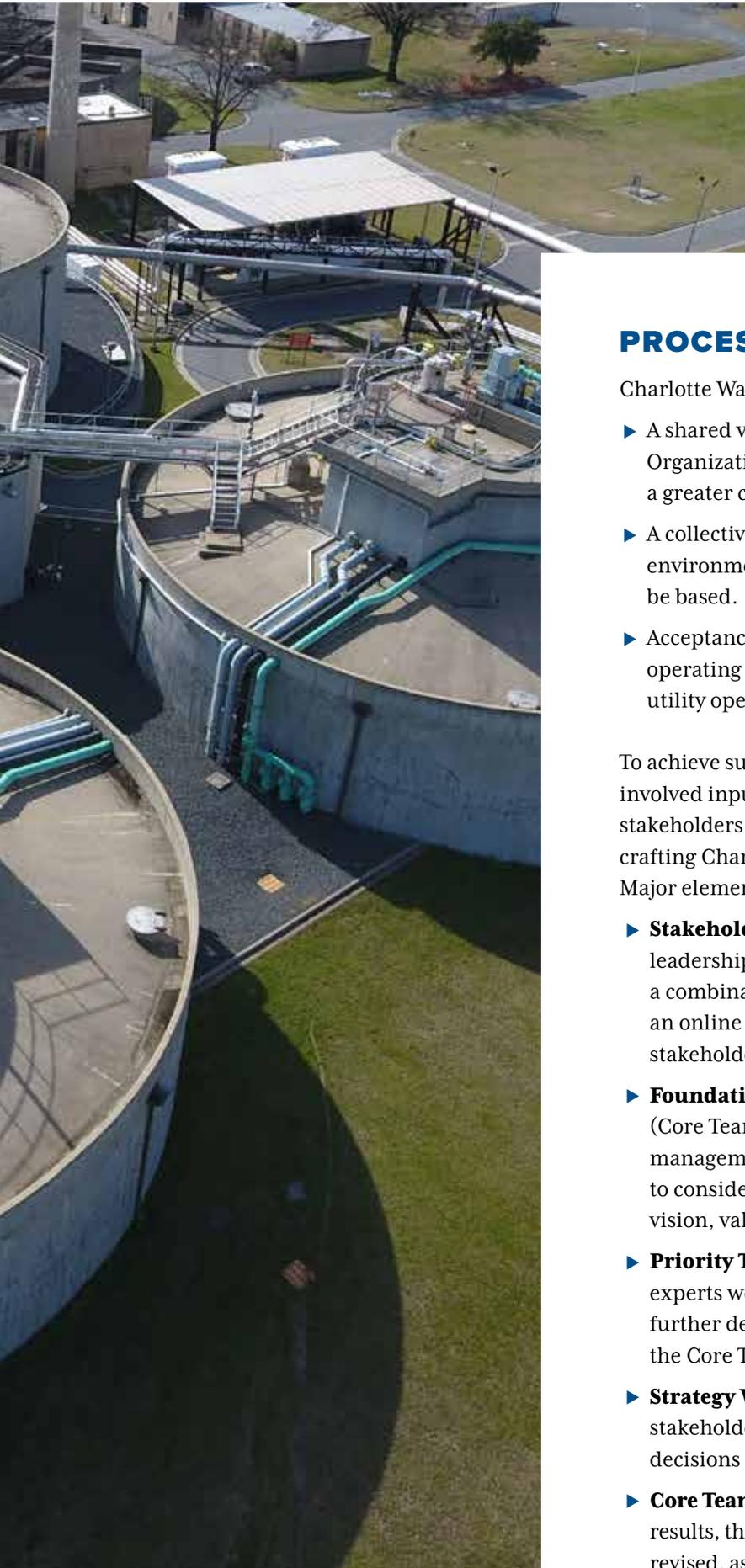
**David Czerr**  
Interim Director



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# Introduction

Charlotte Water initiated a strategic planning process in July 2019 to update its organizational vision and develop a framework for guiding its future. The strategic framework presented in this document will help guide investments, allocate resources, and provide a structure for annual progress reviews and updates to assure long-term priorities and objectives are achieved.



## PROCESS

Charlotte Water's strategic planning process was designed to ensure:

- ▶ A shared vision of Charlotte Water's goals and priorities. Organizations driven by a clear purpose and shared values have a greater capacity to succeed than those that are not.
- ▶ A collective understanding of the available resources, the environment, and the principles upon which strategies will be based.
- ▶ Acceptance of the direction and urgency of the strategic and operating plans, which will be integrated into day-to-day utility operations.

To achieve success, Charlotte Water's strategic planning process involved input from a broad array of internal and external stakeholders and consistent communication of progress made in crafting Charlotte Water's vision, mission, and overall strategic plan. Major elements of the process included:

- ▶ **Stakeholder Input:** Input was obtained from Charlotte Water's leadership team, employees, and external stakeholders through a combination of interviews, four community listening sessions, an online employee survey with more than 340 responses, three stakeholder focus groups, and 10 employee focus groups.
- ▶ **Foundation Workshop:** A core strategic planning team (Core Team), consisting of members of Charlotte Water's senior management and representatives from the City of Charlotte, met to consider the stakeholder input and to draft the organization's vision, values, mission, and priorities.
- ▶ **Priority Teams Input:** Teams of employee subject matter experts were created, drawing from across the organization, to further define Charlotte Water's priorities and provide input to the Core Team on measures and strategies.
- ▶ **Strategy Workshop:** The Core Team reviewed the input from the stakeholder engagement exercises and then made preliminary decisions on what content to include in the final plan.
- ▶ **Core Team Review:** After documenting the strategy workshop results, the priority teams and the Core Team reviewed and revised, as needed, the elements of Charlotte Water's strategic plan.

# Charlotte Water Services

Charlotte Water maintains three water treatment plants and seven wastewater treatment plants. In fiscal year 2020, services provided by Charlotte Water included:



Repairing **3,805** leaks



Cleaning **971** miles of wastewater pipes



Regulating **58** industries to protect water from harmful pollutants



Investigating **368** high bills per month

Maintaining over **8,769** miles of pipe

Installing **86.1** miles of new pipes



Providing clean water with **0** water quality violations



Completing **220,000** drinking water lab tests



Creating **6,616,301** kWh from combined heat and power systems



Maintaining **17,517** hydrants

# Environmental Scan

Charlotte Water's operating environment was documented through:

- ▶ An analysis of community demographics and other external influences (community profile)
- ▶ Considerations of stakeholder input, key industry trends, and their potential impact on the organization
- ▶ The organization's strengths, opportunities, aspirations, and results (SOAR)



## COMMUNITIES SERVED

Charlotte Water is the largest public water and wastewater utility in the Carolinas, serving more than a million customers in the City of Charlotte and greater Mecklenburg County, including the Towns of Matthews, Mint Hill, Pineville, Huntersville, Davidson, and Cornelius.





Photo by Alex Krupchenko



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## Community Profile

The City of Charlotte and its surrounding area is a growing and diversifying community with a rich history.

Located in North Carolina near the South Carolina border and just a few hours east of the Blue Ridge Mountains, the City was initially settled around 1750 by a large wave of Scots-Irish settlers. The City was officially incorporated in 1768 and became the Mecklenburg County (County) seat in 1774. In the 1800s, the Charlotte area was the center for U.S. gold production, kicking off the U.S. gold rush and dubbing the area the “Gold Region” for many years. After the Civil War, Charlotte grew as a textile manufacturing and railroad hub. Many of the historic textile buildings have been restored recently and are being converted into apartment buildings, food halls, breweries, boutique malls, office buildings, and more. In addition to the museums, shopping, and dining attractions, visitors now come to Charlotte and its surrounding area to see the NASCAR Hall of Fame, the Billy Graham Library, the U.S. National Whitewater Center, and the Charlotte Motor Speedway. Charlotte is also home to major sports teams, recently winning a bid for a new Major League Soccer team to join the Carolina Panthers (NFL), Charlotte Hornets (NBA), Charlotte Knights (MiLB), and Charlotte Checkers (AHL).

In the 1970s and 1980s, the City’s modern-day banking industry took off. Charlotte is now the second-largest banking headquarters in the country, after New York City. In addition to being home to the east coast headquarters of Wells Fargo and national headquarters of Bank of America, the City will soon be welcoming the headquarters for Truist, the merged financial institution of BB&T and SunTrust. Along with these banking companies, Charlotte is the home of several Fortune 1000 companies, including Lowe’s and Coca-Cola Bottling Company. Job growth is increasing; according to Census data, the employment rate in Mecklenburg County grew at a rate of 2.6% from 2017 to 2018, compared to the 1.5% national average in the same time period. The Median Household Income (MHI) of Mecklenburg County is \$63,967, which is higher than the statewide MHI of \$50,320 and the national MHI of \$60,293.

In the last decade, Mecklenburg County's population has increased by more than 18%. The U.S. Census Bureau estimates Mecklenburg County's current population to be over 1,000,000 and the City of Charlotte's population to be 870,000. Since 2010, more than one quarter of Mecklenburg County's population growth was comprised of immigrants. The international community represents 15% of the County population, which exceeds the 13.5% national average for foreign-born population percentage. The Census Bureau estimates that 47% of the County's international population is from Latin America and 33% is from Asia. Immigrants from Europe and Africa each represent 9% of the international population. Roughly 20% of the City's population speak a language other than English at home. The most common foreign languages spoken in the area are Spanish, Nepali, French, Chinese, and Vietnamese.

Growth has been significant for the area, in part because of the healthy economy and a lower cost of living relative to other large U.S. metro areas. In 2018, the median home value was \$230,900 in Charlotte and \$253,000 in Mecklenburg County, based on the U.S. Census Bureau. Though the cost of living has been relatively low, it may not stay that way; the median home value in Charlotte and Mecklenburg County increased by 7% and 8%, respectively, from 2017 to 2018. This growth has made the City of Charlotte the 16th largest city in the U.S. and the largest city in North Carolina.



Photo by the Town of Davidson



Photo by Matthews Farmers Market



**INCORPORATED IN  
1768**



**GOLD RUSH IN  
1800s**



**16<sup>TH</sup>  
LARGEST CITY  
IN THE U.S.**



**OVER  
1 MILLION  
LIVE IN  
MECKLENBURG  
COUNTY**



**\$63,967  
MEDIAN  
HOUSEHOLD  
INCOME**



**EMPLOYMENT  
RATE GREW  
2.6%  
FROM 2017-2018**

## » 1899

The City of Charlotte bought The Charlotte Water Works Company for \$226,400. It has 76 hydrants and a pumping capacity of 1 million gallons per day.

## » 1903

The first wastewater septic/treatment plants were built.

## » 1911

The original Catawba River Pump Station was opened to provide drinking water and fire protection.

## » 1922

Vest Drinking Water Treatment Plant was built.

## » 1927

Charlotte begins construction on two new wastewater plants, Sugar Creek and Irwin.

## » 1948

A new industrial waste ordinance is created in order to keep pollution out of our creeks.

## » 1989

The system has now reached over 4,000 miles of water and sewer pipes.

## » 2015

Name is changed to Charlotte Water.

## » 2019

Charlotte Water employs a staff of 997 who serve over one million residents and has over 290,442 water service connections.



## CHARLOTTE WATER

In 1889, the City of Charlotte purchased The Charlotte Water Works Company for \$226,400. At the time, The Charlotte Water Works Company maintained 76 hydrants and had a pumping capacity of 1 million gallons per day. Today, the successor of The Charlotte Water Works Company, Charlotte Water, remains a department of the City of Charlotte and provides water and wastewater services to the residents and businesses of Mecklenburg County. This includes the City of Charlotte as well as the Towns of Matthews, Mint Hill, Pineville, Huntersville, Davidson, and Cornelius. Charlotte Water also has connection agreements with multiple surrounding counties and towns. The water in this region comes from the Catawba-Wateree River Basin. The Catawba-Wateree River flows approximately 320 miles from its headwaters in the North Carolina mountains to merge with the Congaree River just upstream of Lake Marion in South Carolina. Along the basin are 11 lakes, including Lake Norman and Mountain Island Lake, which are the raw water source for the Charlotte Water treatment plants.

Charlotte Water supports the City's goals and focus areas. The City of Charlotte's 2020 budget presents a focused effort on ensuring an equitable, sustainable, and resilient Charlotte. The City's priorities are economic development, neighborhood development, transportation and planning, and well-managed government. The 2020 budget includes increasing affordable housing, preserving our environment, enhancing equitable economic opportunity, investing in neighborhoods, and enhancing mobility, accessibility, and connectivity.

The region is expected to continue to grow and diversify. Charlotte Water plays a vital role in the growth and development of the region and must ensure equitable access to a reliable water supply. Through this strategic plan, Charlotte Water is committing to focus on the future of the region.



## PROMOTING EQUITY

The City of Charlotte has prioritized economic and neighborhood development and transportation, which help to build an equitable Charlotte. While Charlotte Water's core purpose is delivering and collecting water, finding ways to build on the core purpose to support progress in other areas is important to the organization. The organization's concepts and ideas around the intersection of water and social equity have been incorporated into the planning process to ensure Charlotte Water's strategic plan aligns with the City's equity goals.

In order to ensure service affordability, Charlotte Water has developed strategies to increase alternative revenue streams, maintain a strong financial plan to keep costs low, and ensure optimal spending. Future initiatives to support the City's goals could include pursuing opportunities to assist customers who require new connections with the initial expenses; building a network of resources, such as plumbers, to support low-income customers; and partnering with other organizations, such as the Charlotte Area Transit System (CATS), to better utilize Charlotte Water rights-of-way for public transportation infrastructure. To better align its work with the communities it serves, Charlotte Water has prioritized creating more opportunities for customer interaction—both digitally and in person. Charlotte Water is committed to understanding and engaging its customers and communities; providing accessible, timely, and consistent service; and continuing to build stakeholder support.



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## Industry Trends & Local Context

Charlotte Water’s services are essential to the health and vitality of its regional service area. In order to achieve continued success, Charlotte Water must address national and state-wide trends that are significant to the organization as it works to update and implement its strategic plan. The Core Team reviewed industry-wide trends and determined how each trend impacts Charlotte Water and whether the trend supports or inhibits continued success. After summarizing how the trend affects the region and the Core Team’s expectations for future impacts, the Core Team considered potential responses and actions that Charlotte Water could take to address these trends.

The following key trends, expectations for the future, and potential Charlotte Water responses helped guide the development of the strategic plan.

## TREND 1: POPULATION

### The Current Situation

The City of Charlotte and Mecklenburg County's population is continuing to increase while the region's source water remains finite. Zoning changes have affected the density of development and there has been recent redistribution of population centers, especially along the light rail corridor in Charlotte. The changes to development and population centers are affecting capacity planning, service provisions, maintenance, and support for aging infrastructure. This further affects the operation costs, resources, and staff. Moreover, demographic composition has been changing in the area, increasing generational and cultural diversity. These changes affect how people view the value of water and the affordability of Charlotte Water's services.

### Potential Charlotte Water Responses

- ▶ Focus on conservation and customer education
- ▶ Look for innovative solutions for infrastructure growth and review the extension policy to address zoning changes
- ▶ Revisit billing structures and fees
- ▶ Get informed and stay informed with built-in feedback loops

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## TREND 2: THE OPERATING ENVIRONMENT

### The Current Situation

The City Council has a high degree of trust in Charlotte Water and values Charlotte Water as a partner and solutions provider for the Council, especially as a key influencer of social equity and affordable housing. Construction costs are increasing, and new projects and system repair must be balanced with service affordability. System development fees are currently in line with other surrounding utilities, and rates are affordable for larger users and commercial customers; however, for low-income users, rates are perceived to be high. As both a water/wastewater utility and a department within the City of Charlotte, Charlotte Water is subject to a large portfolio of regulatory requirements of which the organization should be mindful. These regulations will continue to evolve and increase, which, in turn, will result in increased costs for Charlotte Water and its customers. The fact that it serves multiple municipal stakeholders from other cities in the region means Charlotte Water must also balance local needs with those of the region, amidst evolving state and federal policies. Nevertheless, Charlotte Water is financially well-managed, and has been successful in ensuring operational needs are being met, even in these complicated conditions.



### Potential Charlotte Water Responses

- ▶ Continue to proactively engage public officials and regulatory groups to promote understanding
- ▶ Continue to focus on Charlotte Water's core functions while finding ways to support progress in other areas
- ▶ Be prepared to respond to increased regulatory requirements and build a reputation as an honest subject matter expert to enhance customer trust
- ▶ Continue to develop an affordability toolbox
- ▶ Ensure appropriate stakeholder input is collected as financial policies and recommendations are developed.



### TREND 3: WORKFORCE

#### The Current Situation

Charlotte Water needs diverse skills across the organization. The healthy economy has enabled increased competition for new employees within the private sector. Meanwhile, in the next three to five years, many employees will reach retirement eligibility, so there is a need for effective knowledge transfer. The population in Mecklenburg County continues to grow and diversify. Charlotte Water values a workforce that is representative of the community and may need to adapt recruiting efforts to better reach a wider net of potential employees. Charlotte Water will need to address these workforce issues to allow for the flexibility needed to react to emergencies and other changes. Addressing these important workforce issues while also filling and maintaining positions will continue to be a focus for Charlotte Water.

#### Potential Charlotte Water Responses

- ▶ Promote public service as a career path
- ▶ Recognize and highlight the desirable elements of jobs when advertising to different groups.
- ▶ Conduct succession planning for key positions
- ▶ Build in opportunities for employees to be cross-trained to encourage future growth and movement within the organization
- ▶ Expand apprenticeship and pipeline programs
- ▶ Recognize employees as individuals and look for opportunities to support individual career growth





## TREND 4: CUSTOMER EXPECTATIONS

### The Current Situation

Customers want reliable, high-quality water service without cost increases. While Charlotte Water provides affordable services, costs are increasing. The City and Charlotte Water's customers will continue to push for affordability as well as financial stability. Balancing the increased costs with affordability is a challenge that Charlotte Water will have to address. Customers also expect to receive fast and consistent service. Customers are likely to compare the service they receive from Charlotte Water to that from other utilities, such as their electric provider. Customers also recognize that Charlotte Water is part of the City and there are expectations for elected officials and leadership to be easily accessible to the public. Customers desire self-serve options, including the ability to pay bills easily and to quickly find information while on the go. Developers, urgently continuing to develop the area, have an expectation and desire for Charlotte Water services to be accessible in all situations, which can sometimes be challenging to meet. Meeting all of these customer expectations is a high priority and achieving higher service levels and greater responsiveness may require more staff and resources and, at a minimum, new thinking.

### Potential Charlotte Water Responses

- ▶ Be consistent in all communication with customers and focus on the value of water service as a primary message.
- ▶ Communicate clearly and proactively with customers to help set service expectations.
- ▶ Collaborate with other departments, like Charlotte-Mecklenburg Storm Water Services and the Charlotte Department of Transportation (CDOT), and regional partners on messaging and customer communication.

## TREND 5: TECHNOLOGY

### The Current Situation

Internally and externally, demand for self-service technology options, accessibility of data, and user-friendly applications is increasing. Additionally, regulatory reporting is often driven by online instrumentation. This creates another level of demand for technology. Adopting new technology to address these demands will require additional skills and competencies within the workforce. Beyond Charlotte Water's Information Technology (IT) group there are multiple groups internal and external to the department that influence, implement, and manage technology. These teams continually work together ensuring consistent and supportable technology integration into operations. Most applications used are hosted on site. The continued risk for Charlotte Water is the level of influence technology has over operations. Put simply: without technology, operations come to a halt.

### Potential Charlotte Water Responses

- ▶ Be willing to think innovatively and be nimble
- ▶ Provide more internal and external self-service options in applications and offerings
- ▶ Evaluate cloud and hosted solutions
- ▶ Continue to improve and enhance business and control system technology security
- ▶ Build internal expertise in security, networking, and systems
- ▶ Consider the impact on and needs of operations when developing processes and solutions
- ▶ Complete more analyses with the data collected and improve data quality

**TREND 6:**

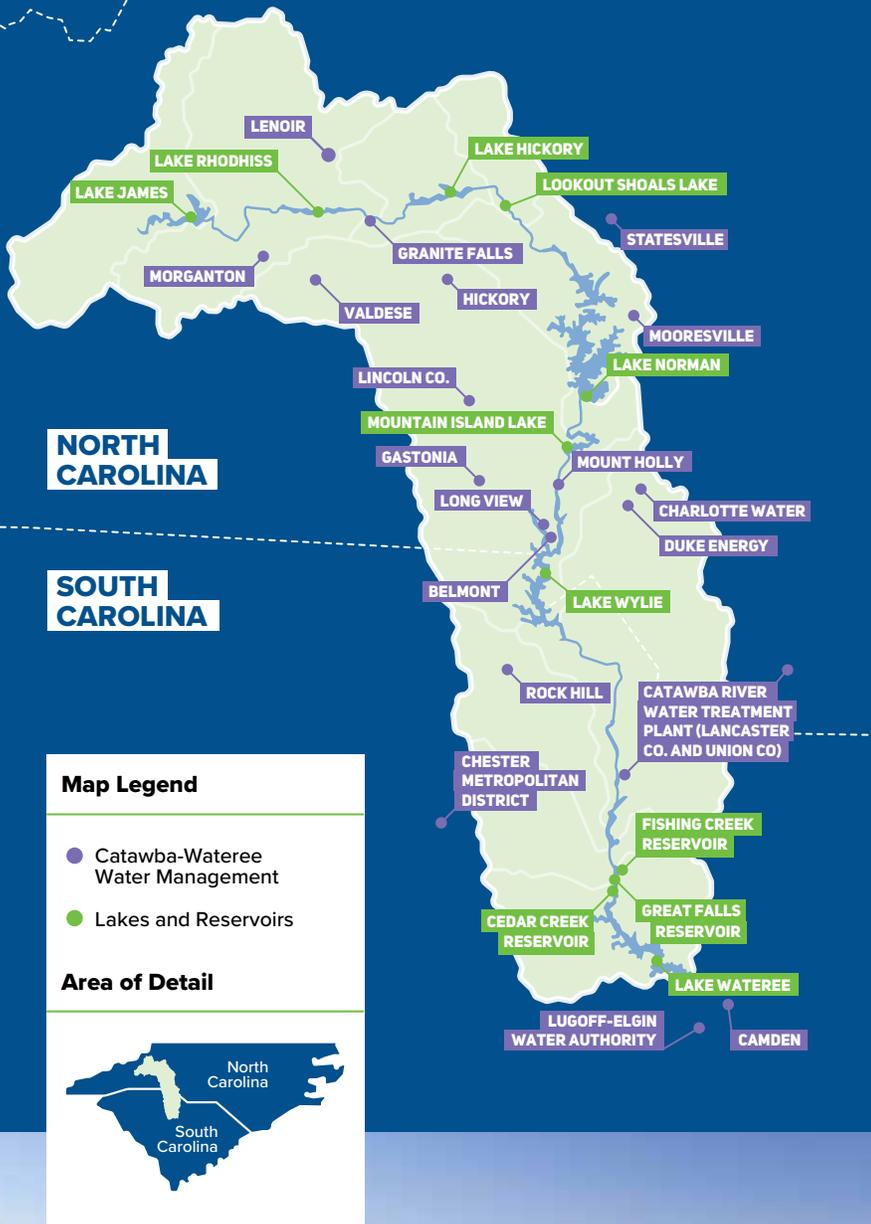
# TOTAL WATER MANAGEMENT

## The Current Situation

The Catawba-Wateree River Basin is the sole water source of the region. Charlotte Water is a member of the Catawba-Wateree Water Management Group which works to develop projects that help preserve, extend, and enhance the capabilities of the basin. Regional partnerships are limited by inter-basin transfers (IBT), and there are other factors, such as upstream discharges, that are out of Charlotte Water's control. Current communication between entities allows Charlotte Water to quickly react to these issues. In the Charlotte area, there is often a lack of dedicated utility corridors in which to place infrastructure, particularly in high density areas. Further, the infrastructure management for water, wastewater, and stormwater is often siloed, which requires a coordinated effort to ensure that the region can grow in an effective and efficient way. Customers want and support conservation programs; however, data shows participation in conservation activities is not very high. Environmental issues, which intersect all of these matters, continue to be significant.

## Potential Charlotte Water Responses

- ▶ Engage with customers on the topic of conservation to build a program and message platform that is both relevant and contextual to them
- ▶ Support residential green infrastructure and implement integrated watershed planning
- ▶ Increase community education around the water cycle and water, wastewater, and stormwater
- ▶ Review and improve how stormwater and treated wastewater are used



## Catawba-Wateree River Basin

The Catawba-Wateree River Basin provides recreation, a diverse ecosystem, and an elevated quality of life for nearly two million people. But the river's water supply is limited, and it is vital to develop strategies to educate about, address, and manage challenges related to the basin.

## TREND 7:

# GROWTH AND ECONOMIC DEVELOPMENT

### The Current Situation

Recent growth has resulted in more varied development projects, and these, in turn, have resulted in changes in water use. Charlotte Water adds 792 new water and sewer service connections for residential and commercial customers per month, and this growth has remained steady. Recently, Charlotte welcomed many new types of businesses and industries to the area as well as many higher density developments, especially along the light rail corridor in Charlotte, that requires large master meters. Development has shifted from greenfield to infill and redevelopment projects. Also, the Street Main Extension Program is holding steady, providing service extensions for existing single-family residential dwellings or vacant lots zoned for single-family residential construction. New development involves costs and obstacles to navigate, and much of the new land being developed does not meet the requirements of current policies. Charlotte Water should design differently to address these issues, such as facilities that have increased pressure, the capacity needs and suitability of fire protection, the higher risks of isolated customers, and the limitations on economic development in some areas.

### Potential Charlotte Water Responses

- ▶ Create a policy on allowable meters and define the resources necessary for maintenance and repair
- ▶ Review and update, as necessary, the service connection and extension policies
- ▶ Recognize that Charlotte Water is a driver of economic development in Charlotte and increase partnerships with businesses to share costs
- ▶ Research alternative options for implementing capital projects and services to lower operating costs, increase consistency, etc.

## TREND 8:

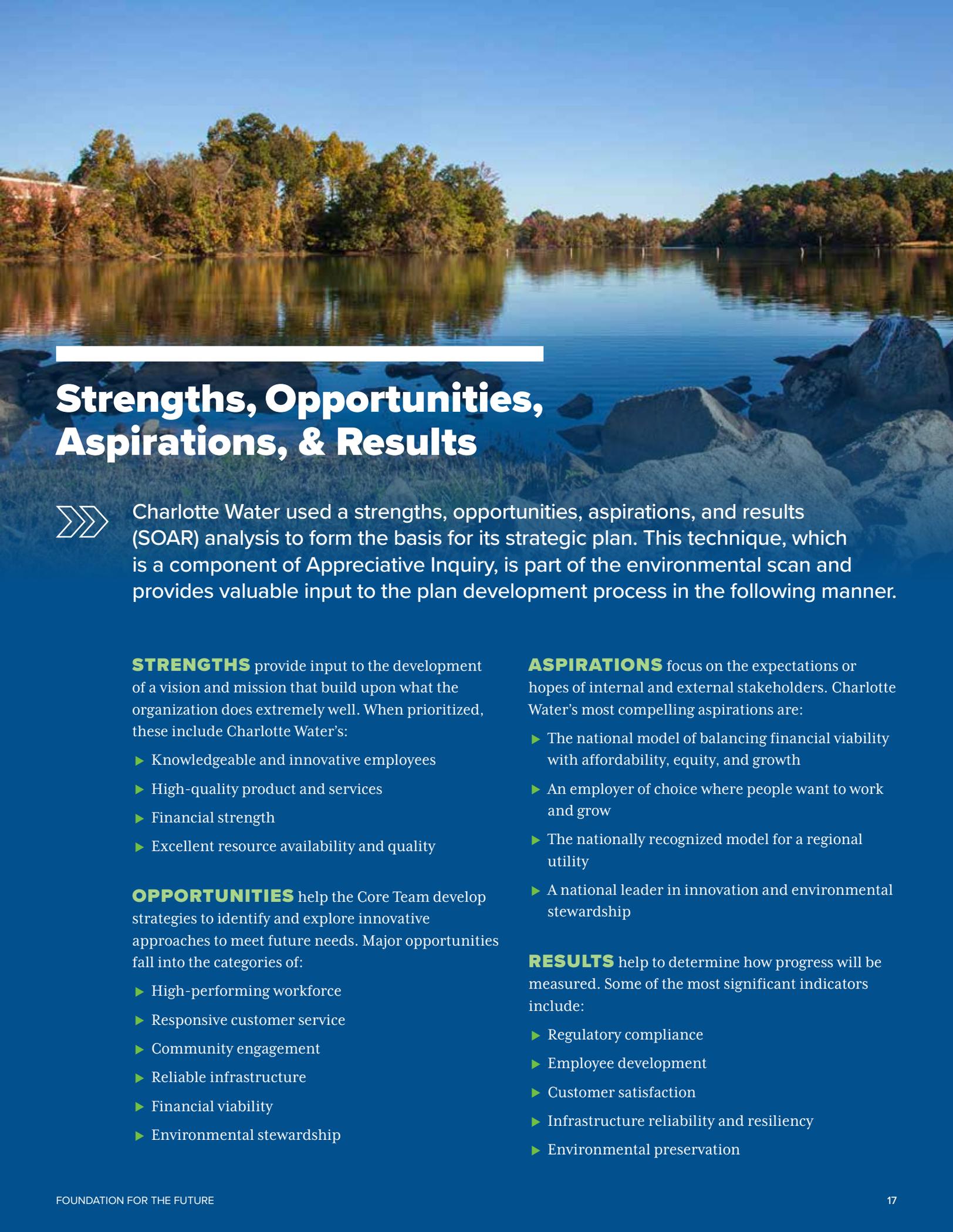
# INCREASED RISK PROFILE

### The Current Situation

The high rate of growth in Charlotte is putting increased pressure and demand on the City's critical water infrastructure. This poses risks to Charlotte Water's financial health as well its ability to meet the Capital Improvement Plan and service delivery expectations for existing customers. In addition to the increased demands of growth, aging infrastructure, climate change, and regulatory requirements are adding further pressures on Charlotte Water to update and adapt its infrastructure. Meanwhile, the limited number of qualified contractors to bid on Charlotte Water work decreases Charlotte Water's ability to accommodate all these demands. Moreover, with Duke Energy in control of Charlotte Water's water source, power, and natural gas, Charlotte Water has limited opportunities to adopt alternative energy and reduce its own risk. Charlotte Water is in the process of updating its risk assessments and emergency response plans in compliance with America's Water Infrastructure Act requirements. This poses an opportunity for the utility to address these issues.

### Potential Charlotte Water Responses

- ▶ Complete business continuity planning and a vulnerability assessment
- ▶ Conduct contingency planning and crisis communication planning
- ▶ Provide data to help set policy and manage risk
- ▶ Maintain customer confidence through continued transparent, two-way communications
- ▶ Continue and enhance collaborative efforts with city and regional partners



# Strengths, Opportunities, Aspirations, & Results



Charlotte Water used a strengths, opportunities, aspirations, and results (SOAR) analysis to form the basis for its strategic plan. This technique, which is a component of Appreciative Inquiry, is part of the environmental scan and provides valuable input to the plan development process in the following manner.

**STRENGTHS** provide input to the development of a vision and mission that build upon what the organization does extremely well. When prioritized, these include Charlotte Water's:

- ▶ Knowledgeable and innovative employees
- ▶ High-quality product and services
- ▶ Financial strength
- ▶ Excellent resource availability and quality

**OPPORTUNITIES** help the Core Team develop strategies to identify and explore innovative approaches to meet future needs. Major opportunities fall into the categories of:

- ▶ High-performing workforce
- ▶ Responsive customer service
- ▶ Community engagement
- ▶ Reliable infrastructure
- ▶ Financial viability
- ▶ Environmental stewardship

**ASPIRATIONS** focus on the expectations or hopes of internal and external stakeholders. Charlotte Water's most compelling aspirations are:

- ▶ The national model of balancing financial viability with affordability, equity, and growth
- ▶ An employer of choice where people want to work and grow
- ▶ The nationally recognized model for a regional utility
- ▶ A national leader in innovation and environmental stewardship

**RESULTS** help to determine how progress will be measured. Some of the most significant indicators include:

- ▶ Regulatory compliance
- ▶ Employee development
- ▶ Customer satisfaction
- ▶ Infrastructure reliability and resiliency
- ▶ Environmental preservation

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## Strategic Direction

This strategic plan serves as a blueprint for future decision making. Furthermore, this plan provides a structure by which annual strategic reviews can be accomplished to ensure priorities and their associated measures retain their relevance over time. By laying out a course of action, this plan represents a disciplined process for making the fundamental decisions shaping Charlotte Water's future.

The Strategic Plan contains the organization's vision, mission, values, priorities, measures, and strategies. It addresses Charlotte Water's current challenges and helps to ensure continued success in operations and the management of resources and assets.





## » Vision

Ultimately, implementation of this plan will enable Charlotte Water to achieve its desired future state as articulated in its vision, which is:

**TO BE A LEADING WATER UTILITY, RECOGNIZED FOR EXCELLENCE AND DEDICATED TO OUR PEOPLE, COMMUNITY, REGION, AND ENVIRONMENT**

## » Mission

The mission describes the organization's purpose and role within the service area. After carefully considering these factors, the Core Team stated:

**CHARLOTTE WATER PROVIDES RELIABLE, HIGH-QUALITY SERVICES TO OUR COMMUNITY THROUGH VALUED EMPLOYEES, FINANCIAL STABILITY, AND ENVIRONMENTAL STEWARDSHIP**

## » Values

The Core Team considered Charlotte Water's most deeply held beliefs, which it would like every member of the organization to embrace. Those values were then organized into the following value statement.

**CHARLOTTE WATER IS COMMITTED TO MEETING THE NEEDS OF ITS COMMUNITY THROUGH:**

- ▶ **Integrity** - Doing the right thing
- ▶ **Expertise** - Being the authority at what we do
- ▶ **Collaboration** - Working together towards common goals
- ▶ **Innovation** - Embracing creativity and continuous improvement

## » Priorities

Priorities represent the most important issues that must be addressed to achieve the desired future. Comments relating to each are presented below.



### **HIGH-PERFORMING WORKFORCE**

**ATTRACT, DEVELOP, AND RETAIN A HIGHLY-SKILLED AND COLLABORATIVE WORKFORCE THAT IS ENGAGED, MOTIVATED, AND DEDICATED**

A high-performing workforce requires individuals who are skilled and dedicated, operating in an inclusive and supportive environment. Accordingly, Charlotte Water is focused on developing, motivating, and retaining its exceptional team while also building on its success and culture by attracting talented employees.



### **RESPONSIVE CUSTOMER SERVICE**

**PROVIDE ACCESSIBLE, TIMELY, AND CONSISTENT CUSTOMER SERVICE**

Charlotte Water is dedicated to communicating clearly and proactively with customers and providing excellent service to everyone. Customer expectations are evolving, and Charlotte Water recognizes the importance of listening to customer feedback to adapt customer service practices and provide a convenient and seamless experience.



## **COMMUNITY ENGAGEMENT**

**UNDERSTAND AND ENGAGE THE CUSTOMERS AND COMMUNITIES WE SERVE**

Charlotte Water recognizes the importance of both internal and external engagement and the value of listening to the communities' needs to help solve problems. Charlotte Water is proud to play a vital role in the health and sustainability of the City and region.



## **RELIABLE INFRASTRUCTURE**

**ENSURE RELIABLE INFRASTRUCTURE TO SERVE THE COMMUNITY TODAY AND INTO THE FUTURE**

As regulatory requirements evolve, the population of Mecklenburg County continues to grow, and critical infrastructure ages, Charlotte Water will be prepared with proactive, efficient infrastructure and technology management.



## **FINANCIAL VIABILITY**

**EQUITABLY MANAGE FINANCIAL RESOURCES, BALANCING AFFORDABILITY AND GROWTH**

Charlotte Water is committed to effectively managing its expenses and seeking additional revenue streams to meet the utility's long-term financial needs, thereby ensuring that financial resources are used efficiently and responsibly.



## **ENVIRONMENTAL STEWARDSHIP**

**PROTECT AND IMPROVE THE ENVIRONMENT**

Charlotte Water will continue to make substantial investments to preserve the regional water environment and encourage wise consumption of scarce resources while also implementing beneficial reuse projects, such as biosolids generation and land application.

## **» Measures & Strategies**

Measures define accomplishments for each priority, and strategies are key resource allocations that should be made over the next several years. These critical elements of the strategic plan, as well as the vision, values, mission, and priorities, are presented on the strategic framework on the following pages.

# STRATEGIC FRAMEWORK

## VISION

To be a leading water utility, recognized for excellence and dedicated to our people, community, region, and environment

## MISSION

Charlotte Water provides reliable, high-quality services to our community through valued employees, financial stability, and environmental stewardship

## VALUES

Charlotte Water is committed to meeting the needs of its community through:

### Integrity

Doing the right thing

### Expertise

Being the authority at what we do

### Collaboration

Working together towards common goals

### Innovation

Embracing creativity and continuous improvement



# PRIORITIES



## HIGH-PERFORMING WORKFORCE

Attract, develop, and retain a highly-skilled and collaborative workforce that is engaged, motivated, and dedicated



## RESPONSIVE CUSTOMER SERVICE

Provide accessible, timely, and consistent customer service



## COMMUNITY ENGAGEMENT

Understand and engage the customers and communities we serve



## RELIABLE INFRASTRUCTURE

Ensure reliable infrastructure to serve the community today and into the future



## FINANCIAL VIABILITY

Equitably manage financial resources, balancing affordability and growth



## ENVIRONMENTAL STEWARDSHIP

Protect and improve the environment

## STRATEGIES

## MEASURES

1. Recruit a diverse workforce, reflective of the community we serve
2. Create an inclusive work environment that engages, inspires, and retains our high-performing team
3. Foster a culture of safety and continuous employee development

- Job offer acceptance rate
- Responses to targeted inclusion questions on employee satisfaction survey
- Percent of non-entry-level positions filled internally
- Overall department satisfaction rating

4. Refine, communicate, and achieve internal and external service level targets
5. Make the customer experience convenient and seamless
6. Provide tools for timely information sharing and customer feedback

- Percent of customer service level targets met
- Percent of first call resolution
- Customer satisfaction rating
- Number of customer-initiated contacts across all platforms

7. Deploy a multi-faceted communication plan, focused on building stakeholder support
8. Promote the essential role Charlotte Water plays in our neighborhoods and community
9. Equip employees with resources and knowledge to be effective Charlotte Water ambassadors

- Sentiment tracking results
- Number of people reached by outreach efforts
- Percent of people who recall engagement with Charlotte Water in last year

10. Develop, prioritize, and implement infrastructure plans that balance growth and reinvestment
11. Leverage asset and related data to shift work processes from reactive to preventative and predictive
12. Embrace innovative solutions to enhance reliable service delivery

- Percent of infrastructure service level targets met
- Ratio of preventative to reactive maintenance
- Infrastructure renewal and replacement rate

13. Maintain a strong financial plan and policies to execute the capital program, meet operational needs, and ensure affordable services
14. Explore additional and innovative funding solutions and revenue streams
15. Ensure optimal capital and operational spending

- Total revenues from new revenue streams and/or innovative funding
- Annual financial targets
- Annual affordability targets
- Impact to/on the regional economy

16. Lead and support the preservation and protection of the regional water environment
17. Develop and deliver impactful environmental sustainability projects
18. Integrate workforce and operational behaviors to enhance positive environmental impacts

- Alignment with Charlotte Strategic Energy Action Plan
- Impact of partnerships on regional conservation and sustainability efforts

# Communications

Through this strategic plan, Charlotte Water has committed to improving internal and external communications. Effective communication is critical not only for the successful implementation of the plan, but also for Charlotte Water's overall success. The issue of communication, which surfaced in the stakeholder input process, is called out specifically, but also cuts across the various strategic priorities. Communications could be enhanced through several efforts, including:

- ▶ Increasing the use of multi-disciplinary teams to manage issues and projects
- ▶ Developing and implementing a proactive outreach and engagement plan
- ▶ Ensuring a consistent, streamlined flow of communication internally and externally
- ▶ Expanding team building and networking, tying individual contributions to overall organizational success



**Enhanced communications will be a major initiative throughout the organization to ensure that all teams and individuals are working towards the ultimate vision and mission.**

# Implementation

The priorities, measures, and strategies contain a series of initiatives and projects that, when implemented, will move Charlotte Water toward achieving its desired outcomes. However, it is important to note that for the desired results to be achieved, the strategies must be effectively implemented. Therefore, careful attention and focus on strategy implementation is essential for achieving strategic success. Elements of the implementation process for Charlotte Water include:

## LEVERAGING TEAMS

Charlotte Water will continue to use teams that are knowledgeable, energized, and committed to the implementation of the strategies for different priorities. These teams will:

- ▶ Draft implementation plans for each strategy that will include:
  - Tasks necessary for implementation
  - Assigned individuals or groups
  - Due dates for key tasks
  - Resources required
- ▶ Monitor implementation progress
- ▶ Report on implementation progress to senior management

## INVOLVING SENIOR MANAGEMENT

During the implementation process, the teams will communicate with senior management concerning:

- ▶ Implementation progress
- ▶ Resources required (people, money, equipment, etc.)
- ▶ Strategies, which after initial implementation efforts may require updates
- ▶ Achievement of objectives

## REPORTING TO CHARLOTTE WATER LEADERSHIP AND THE CITY OF CHARLOTTE

Senior management is accountable to the Charlotte City Manager and City Council for implementation of the approved strategic plan and achievement of the stated priorities and objectives. Accordingly, senior leadership will periodically update City staff on progress, achievements, and issues related to the plan.



Strategic planning is a way of thinking that guides an analysis of the present and helps create a vision of the future. Charlotte Water has developed a strategic plan that will take some time to implement completely; however, it will provide a guide to the organization's long-term strategic success.

