

**South Central Connecticut Regional Water Authority**  
90 Sargent Drive, New Haven, Connecticut  
or  
Via Remote Access\*\*

**AGENDA**

**Regular Meeting of Thursday, June 22, 2023 at 12:30 p.m.**

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- A. Safety Moment
- B. Public Comment: The time limit granted to each speaker shall be three (3) minutes. Residents and customers may address the Board.
- C. Meet as Strategic Planning Committee: D. Borowy
  - 1. Approve Minutes – February 23, 2023 meeting
  - 2. Review FY 2023 Year-end Strategic Action Plan Update & Global Metrics
  - 3. Review FY 2024 Strategic Action Plan & Global Metrics
  - 4. Collection Strategy Presentation: P. Singh and D. Bochan
  - 5. Customer Service Experience Memorandum
- D. Consent Agenda
  - 1. Approve Minutes – May 25, 2023 meeting
  - 2. Capital Budget Authorization - July 2023
  - 3. Key Performance Indicators – FY 2023 Q4
  - 4. Accounts Receivable Update – May 2023
  - 5. FY 2024 RPB Weighted Vote Calculation
  - 6. RPB Dashboard Report
- E. Finance: R. Kowalski
  - 1. Fiscal Year-end Financial Report
  - 2. Allocation of Year-end Revenue Balance
  - 3. Proposed Revisions to FY 2024 Capital Budget Projects and Release of Project Reserves
- F. Consider and act on resolution regarding Treasurer Bond: R. Kowalski
- G. RPB Committee meeting assignments and reports on RPB Committee meetings
- H. Business Updates: L. Bingaman
  - 1. Monthly Business Highlights
  - 2. CIS Update: P. Singh
- I. Meet as Commercial Business Committee: K. Curseaden
  - 1. Approve Minutes – March 23, 2023 meeting
  - 2. Review and adopt Committee Charter
  - 3. \*Commercial Business Strategy, Goals & Updates - *Upon 2/3 vote, convene in executive session pursuant to C.G.S. Section 1-200(6)(E) to discuss matters covered by Section 1-210(b)(5)(B), pertaining to commercial and financial information*
- J. Act on matters arising from Committee meetings
- K. Applications for the dispositions of:
  - 1. 17.22 acres located west of Beech Street in North Branford that is part of Land Unit NB 4: S. Lakshminarayanan and J. Triana
  - 2. 19.462 acres located north of Poms Lane in North Branford that is part of Land Unit NB 4: S. Lakshminarayanan and J. Triana

\*RPB Member (N. Campbell) will be excused at item I.3

<p>** Members of the public may attend the meeting in person or via conference call. For information on attending the meeting and to view meeting documents, please visit <a href="https://tinyurl.com/ysu5fy3e">https://tinyurl.com/ysu5fy3e</a>. For questions, contact the board office at <a href="mailto:jslubowski@rwater.com">jslubowski@rwater.com</a> or by calling 203-401-2515.</p>
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**SOUTH CENTRAL CONNECTICUT REGIONAL WATER AUTHORITY**

90 SARGENT DRIVE, NEW HAVEN, CONNECTICUT

JUNE 22, 2023 AT 12:30 P.M.

Remote Meeting Instructions:

**Call in (*audio only*)**

+1 469-965-2517,,658554718# United States, Dallas

Phone Conference ID: 658 554 718#

Members of the public may join the meeting in person at address above or by conference call. To view meeting documents please visit <https://tinyurl.com/ysu5fy3e>. For questions, contact the board office at 203-401-2515 or by email at [jslubowski@rwater.com](mailto:jslubowski@rwater.com)

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**South Central Connecticut Regional Water Authority  
Strategic Planning Committee**

**Minutes of the February 23, 2023 Meeting**

The regular meeting of the Strategic Planning Committee of the South Central Connecticut Regional Water Authority took place on Thursday, February 23, 2023, at 90 Sargent Drive, New Haven, Connecticut and via remote access. Chair Borowy presided.

Present: Committee Members Present– Messrs. Borowy, Curseaden, and Mss. LaMarr and Sack  
Management – Mss. Kowalski, Augur and Calo, and Messrs. Bingaman, Donovan, Hill, Lakshminarayanan, and Singh  
RPB – Mr. Havrda  
Staff – Mrs. Slubowski

The Chair called the meeting to order at 12:54 p.m.

On motion made by Ms. Sack, seconded by Ms. LaMarr, and unanimously carried, the Strategic Planning Committee voted to approve the minutes of its November 17, 2022 meeting.

Borowy Aye  
Curseaden Aye  
LaMarr Aye  
Sack Aye

The Committee reviewed its FY 2024 Work Plan.

At 12:55 p.m., on motion made by Ms. Sack, seconded by Ms. LaMarr, and unanimously carried, the Authority voted to convene in executive session pursuant to C.G.S. Section 1-200(6)(E) to discuss matters covered by Section 1-210 subsection b #5(B) concerning commercial or financial information. Present in executive session were the Authority members, Messrs. Bingaman, Donovan, Hill, Lakshminarayanan, Singh and Mss. Augur, Calo, Kowalski, and Slubowski

Borowy Aye  
Curseaden Aye  
LaMarr Aye  
Sack Aye

At 1:57 p.m., the Authority voted to come out of executive session and adjourn.

Borowy Aye  
Curseaden Aye  
LaMarr Aye  
Sack Aye

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David Borowy, Chairman



## **Fiscal Year 2023 Strategic Initiatives & Global Metrics Update**

June 22, 2023

Perspective & Strategy	FY23 Action Plans
<b>Customers/Constituents:</b> Improve Customer Satisfaction	<ul style="list-style-type: none"> <li>✓ Develop a six-point Customer Service Standards training program and budget with a focus on external and internal customers; deploy to all employees in FY24.</li> </ul>
<b>Customers/Constituents:</b> Utilize Technology to Enhance the Customer Experience	<ul style="list-style-type: none"> <li>✓ Introduce two innovative digital solutions to bolster the customer experience and foster more customer self-service options and capabilities for water and solutions customers.</li> <li>✓ Execute CIS project and deliver on key deliverables (pre-configuration; analysis of key business processes; data cleansing; approval of contract execution) on time and on budget.</li> </ul>
<b>Customers/Constituents:</b> Increase Constituent Support of the RWA	<ul style="list-style-type: none"> <li>✓ Address four areas for improvement identified in 2019 customer satisfaction survey by developing and deploying cross-departmental plans and programs.</li> <li>✓ Benchmark customer satisfaction survey instrument and current fielding trends with Great Blue Research in advance of resuming a customer satisfaction survey in FY24 to develop the optimum approach.</li> <li>✓ Aggregate results from customer transaction surveys launched in FY22 and create and deploy plans and programs that address at least two areas of improvement.</li> </ul>
<b>Employee Learning &amp; Growth:</b> Advance Workforce Safety	<ul style="list-style-type: none"> <li>✓ Develop a near miss reporting policy, deploy, train employees and create a baseline for continuous improvement.</li> <li>✓ Implement Safety Ambassador program with 100% training completed.</li> </ul>
<b>Employee Learning &amp; Growth:</b> Foster a Diverse, Inclusive and Engaged Workforce	<ul style="list-style-type: none"> <li>✓ Increase DE&amp;I representation in two underrepresented job categories.</li> <li>✓ Develop and deploy employee engagement plans to address at least two areas of improvement in response to recent surveys.</li> </ul>
<b>Financial:</b> Expand Commercial Revenue Sources to Mitigate Rate Increases	<ul style="list-style-type: none"> <li>✓ Fully commercialize Well Services organic growth with 1,000 new customers through deployment of a dispatch program and marketing and hiring plans.</li> <li>✓ Fully commercialize a PipeSafe expansion with 1,000 new customers in neighboring service area communities.</li> <li>✓ Continue to deploy product, partnership, organic growth and acquisition strategies to increase commercial net revenue to ~\$7 million in FY23.</li> </ul>
<b>Financial:</b> Improve the Financial Operating Performance of the RWA	<ul style="list-style-type: none"> <li>✓ Identify two innovative viable funding solutions to help fund the capital improvement program.</li> <li>✓ Track and monitor unplanned expenditures to represent not more than 5% of the capital budget.</li> <li>✓ Develop a critical-component stocking program to offset supply chain and unplanned asset expenditures; deploy in FY24.</li> </ul>
<b>Financial:</b> Strengthen Pension and Retirement Funding	<ul style="list-style-type: none"> <li>✓ Continue to adjust pension contribution to achieve 100% funding by end of FY25.</li> </ul>
<b>Internal Business Process:</b> Effectively Manage and Maintain Our Core Business	<ul style="list-style-type: none"> <li>✓ Utilize the Risk Mitigation team to target five new risk perspectives and deploy action plans.</li> <li>✓ Using a cross-functional team, finalize the Asset Management roadmap to develop a comprehensive plan for operational, financial, resources, planning and services; implement two critical initiatives.</li> <li>✓ Mobilize Lead Service Line project planning team and successfully achieve key milestones including a shared governance model, and communications and operational plans.</li> </ul>
<b>Internal Business Process:</b> Sustainably Manage our Natural Resources to Deliver Reliable, Clean, Safe Water	<ul style="list-style-type: none"> <li>✓ Utilize established Water Resources Management Group to enhance water system operations and water-quality optimization of our natural resources with a focus on diversion structures so that 90% of disinfection by-product tests are at least 10% below maximum drinking water thresholds.</li> <li>✓ Develop and deploy a program to reduce unaccounted-for-water leakage by at least 18 million gallons.</li> </ul>
<b>Internal Business Process:</b> Embrace Innovation and New Technology	<ul style="list-style-type: none"> <li>✓ Continue development of technical road maps and plan for single points of failure for two obsolete</li> <li>✓ Implement at least four process improvements to bolster efficiency and productivity across the enterprise.</li> </ul>

# Perspective: Customers/Constituents

## Key Strategies

- Improve customer satisfaction
- Utilize technology to enhance the customer experience
- Increase constituent support of the RWA

## FY23 Actions Update

- ✓ Selected training partner for **internal/external customer service training in FY24**; phased planning/scheduling on track for FY24 deployment.
- ✓ **2 new digital solutions** completed to improve customer experience: 1) Lab website refresh; 2) RWA Connect mobile app enhancements.
- ✓ **4 key CIS project phase gates** achieved: 1) contract execution; 2) pre-configuration; 3) analysis of key business processes; 4) data cleansing.
- ✓ **4 enhancement and communications plans executed** for priority areas identified in last Customer Satisfaction Survey: 1) value of water; 2) first-call resolution; 3) knowledge of field personnel; 4) environmental stewardship.
- ✓ Partnered with GreatBlue Research on a **reconstituted Customer Satisfaction Survey** to be deployed in FY24; includes a mix of telephone and digital fielding techniques and includes questions related to: 1) company characteristics/brand image; 2) customer/field service; 3) water quality; 4) communications preferences.
- ✓ **2 improvement plans** identified from results of **Customer Transaction Surveys** deployed with Customer Care representatives: 1) first-call resolution; 2) appears knowledgeable.
- ✓ At FY23 year end, 41, 114 customers enrolled in **e-Billing**, that's a **35.4% adoption rate**, exceeding FY23 goal of 35%.
- ✓ Achieved significant results from **accounts receivables** post-pandemic strategy: payments associated with delinquent notices (\$8.05M) and shuts (\$772K).
- ✓ Developed a training video for **New Haven Fire** Department to help them with hydrant-testing techniques.
- ✓ Met with **New Haven Public Works** Director to coordinate 2023 city-wide paving projects for greater engagement and coordination.
- ✓ Initiated talks with **New Haven Police** to partner with RWA on getting inner city children to our recreation sites for a 2023 fishing event.
- ✓ Rejoined the **Hamden Chamber of Commerce** to build relationships as work progresses on La

# Perspective: Employee Learning & Growth

## ***Key Strategies***

- Advance workforce safety
- Develop employees by improving knowledge, skills and abilities
- Foster a diverse, inclusive and engaged workforce

## **FY23 Actions Update**

- ✓ Introduced a new phone app for **Near-Miss Reporting** and provided employees with training.
- ✓ Launched a new **Safety Ambassador** program, representing every Division of the RWA, that focuses a portion of each meeting on training related to hazard recognition and safety leadership.
- ✓ Executed an **organizational redesign** for Operations Division as part of new succession planning framework.
- ✓ Initiated **6 meetings with CEO and USW leadership** to foster better relations.
- ✓ Hired new **Training Manager** who is leading training and career development programs across company, positions and departments.
- ✓ **22 employee promotions** and **40 new hires** helped to increase DE&I among EEO workgroups.
- ✓ Introduced new **employee sentiment, recognition and rewards** platform called Cooleaf.
- ✓ Addressed **2 areas of improvement** identified in DE&I employee surveys – employee engagement and well-being – and held **5 major event/in-office collaboration engagement opportunities**: 1) Safety Cookout; 2) wellbeing campaign called the Step Challenge; 3) New Year business breakfast at New Haven Lawn Club; 4) Super Duper Weenie Truck for Employee Appreciation Day; 5) Biometric Health Fair.

## **Key Strategies**

- Expand commercial revenue sources to mitigate rate increases
- Improve the financial operating performance of the RWA
- Strengthen pension and retirement funding

## **FY23 Actions Update**

- ✓ Conveyed **4 indicative bid offers**; submitted **2 RPB applications** for plumbing acquisitions.
- ✓ Initiated **PipeSafe economic adjustment** valued at approximately \$300,000 in FY23; \$1 million in FY24.
- ✓ Operationalized **PipeSafe territory expansion** with **1 regional water utility**: Southeastern Connecticut Water Authority; **3 municipal water utilities**: Meriden, Wallingford and Wolcott.
- ✓ Increased demand generation and relaunched **WellSafe Protection** to private well owners inside and outside of RWA service area.
- ✓ Ensured that **Well Services' financial performance** was slightly better than budget at end of FY23.
- ✓ Outside **Lab Services' performance** improved significantly in FY23 as compared to FY22.
- ✓ Identified **alternative funding** sources, including submission of multiple DWSRF applications; working with WIFIA on financing for the Whitney Dam, along with state bonding grants; and partnering with the EPA on the procedures associated with our \$3.3 million Congressional Directed Spending awards for water treatment plant improvements.
- ✓ Tracked **unplanned emergency capital expenses** and came within goal of 5%.
- ✓ Increased financial acumen among employees by holding **2 RWA Employee Talks** learning events: 1) Ten-Year Model; 2) 2023 Rate Application.
- ✓ Allocated additional FY23 year-end **pension contribution** of \$2 million; overall contribution was \$2.3 million above the Actuarial Required Contribution.
- ✓ Achieved **140% coverage** without a draw from discretionary funds; significantly exceeded required 114% coverage.
- ✓ Ensured more than **96% of FY23 capital budget** was put to work for the benefit of customers.

# Perspective: Internal Business Process

## Key Strategies

- Effectively manage and maintain our core business
- Sustainably manage our natural resources to deliver reliable, safe water
- Embrace innovation and new technology

## FY23 Actions Update

- ✓ Created **action plans for 8 risks** (FY23 goal was 5): 1) insider threat; 2) third-party hosted data; 3) lead and copper rule compliance; 4) mergers and acquisitions; 5) reservoir water quality; 6) HR compliance; 7) technology obsolescence; 8) cyber insurance coverage.
- ✓ Developed and operationalized a revised **RPB Dashboard** highlighting FY23 metrics for monitoring the financial health of the organization.
- ✓ There were no **near-misses for THMs and HAAs** during all FY23 compliance sampling periods.
- ✓ Initiated RWA's participation in first **legionella distribution system study** by the Water Research Foundation; provided pertinent data to the CTDPH.
- ✓ Completed **overhaul/repair of 7 critical pumps** through predictive maintenance to ensure continuous operation.
- ✓ **Lead & Copper Rule Revisions** (LCRR) compliance initiative:
  - Provided testimony on DWSRF Intended Use Plan focused on subsidies available for service line replacement associated with LCRR and customer impact.
  - Incorporated preliminary estimates of the impact of LCRR into Ten-Year Model and associated policy recommendations.
  - Initiated governance model, customer communications, operational plans, and awarded contract to CDM Smith for Phase II of Inventory Development.
- ✓ Successfully deployed a pilot technology (FIDO) to reduce **unaccounted-for-water** leakage by 18 million gallons in FY23; achieved target reduction goal.
- ✓ Completed **2 functional business continuity** exercises: 1) North Cheshire Wellfield climate change/water quality resiliency; 2) activation of EOC by Leadership Team.
- ✓ Developed and deployed a **critical component stocking program** with essential components identified and many of them stocked.
- ✓ Completed **6 business process improvements** (goal was 4): 1) intranet improvements; 2) commercial business field productivity; 3) construction and jobbing; 4) capital planning; 5) Integrated Voice Response improvements; 6) Laboratory Information Management Systems.
- ✓ Delivered **4 phishing campaigns** with 100% of employees followed by real-time training and education.

## Global Metrics FY23 Update

KPI Name	Level	Description	FY23 Target	Status
Customer Satisfaction	Global	Address four areas for improvement identified in 2019 Customer Satisfaction Survey.	4 Areas of Improvement	
Safety	Global	Continue the safety journey toward achieving zero preventable injuries.	0 Preventable Injuries	
DE&I/Employee Engagement	Global	Address two areas of improvement in response to employee surveys about DE&I and employee engagement.	2 Improvement Opportunities	
Cybersecurity	Global	Maintain 100% compliance with the deployment of four phishing campaigns designed to transform employee behavior and build organizational resilience to cybersecurity.	100% Compliance	
Process Improvements	Global	Implement four process improvements to achieve efficiencies across the organization.	4 Process Improvements	
Discretionary Funds	Global	Achieve in excess of 114% coverage with no shortfall.	>114% Coverage	
Capital Efficiencies	Global	Ensure at least 96% of FY23 capital budget work effectively for the benefit of customers.	Budget	



# FY24 Strategic Action Plan

June 22, 2023

 Regional **Water** Authority

Tapping the Possibilities™

# 2020-2025 Strategic Plan

The Leadership Team took the five year 2020-2025 Strategic Plan, assessed the progress made to date against the strategies and goals the organization needs to successfully advance the RWA over the coming years, and engaged employees to help develop our FY24 Strategic Action Plan and Global Metrics.

## Five-Year Strategic Plan

- Developed five-year strategy in FY2020
- Adjusted periodically to address customer expectations and needs; technology advancements; external and competitive environment; employee progress/concerns; economy and other factors

### 4 Perspectives

- ✓ Customers/Constituents
- ✓ Employee Learning & Growth
- ✓ Financial
- ✓ Internal Business Process

#### Five-Year Strategic Plan

Fiscal Years 2020-2025

Updated June 2021



## FY24 Strategic Planning

- Ensured our FY24 objectives are aligned with the five-year strategic plan
- Employees conducted subject-matter expert interviews; engaged throughout the process
- Incorporated employee input from recent DE&I focus groups and surveys
- Leadership Team took all input from teams and finalized actions/KPI recommendations



## Strategic Action Teams

- Cross-functional team of 20 employees
- 4 teams aligned to a Balanced Scorecard perspective

# We have a solid strategy that will continue to evolve

**Our vision:** To be an innovative water utility and environmental services company that sustains life, strengthens our communities and protects natural resources for future generations.

PERSPECTIVE	SUMMARY OF FIVE-YEAR STRATEGIES
<b>Customers &amp; Constituents</b>	<ul style="list-style-type: none"> <li>• Improve customer satisfaction</li> <li>• Utilize technology to enhance the customer experience</li> <li>• Increase constituent support of the RWA</li> </ul>
<b>Employee Learning &amp; Growth</b>	<ul style="list-style-type: none"> <li>• Advance workforce safety</li> <li>• Develop employees by improving knowledge, skills and abilities</li> <li>• Foster a diverse, inclusive and engaged workforce</li> </ul>
<b>Financial</b>	<ul style="list-style-type: none"> <li>• Expand commercial revenue sources to mitigate rate increases</li> <li>• Improve the financial operating performance of the RWA</li> <li>• Strengthen pension and retirement funding</li> </ul>
<b>Internal Business Process</b>	<ul style="list-style-type: none"> <li>• Effectively manage and maintain our core business</li> <li>• Sustainably manage our natural resources to deliver reliable, safe water</li> <li>• Embrace innovation and new technology</li> </ul>

Perspective & Strategy	2025 Strategic Goal & Related FY24 Strategic Action
<p><i>Customers/Constituents:</i>  <b>Improve Customer Satisfaction</b></p>	<p><b>Goal – Customer Satisfaction: Maintain RWA best-in-class 91.8% Customer Satisfaction Index by May 2025</b>            ✓ Reduce the number of customer water-quality complaints 10% from a baseline average of 610 complaints a year through flushing improvements and increased system maintenance.</p>
<p><i>Customers/Constituents:</i>  <b>Utilize Technology to Enhance the Customer Experience</b></p>	<p><b>Goal – Technology Obsolescence: Develop technology roadmap to ensure technology obsolescence and single points of failure are eliminated by May 2025</b>            ✓ Achieve 100% of Project RWAY 's 3 key phase gates on time to ensure success of CIS implementation: 1) analysis, OCM and UMAX installation (Q1 FY24); 2) design and data migration scope (Q2 FY24); 3) development and integrated system test design (Q3 FY24).  <b>Goal – Self Service: Ensure 42% of customer base is using self-service options for billing and more by May 2025</b>            ✓ Enroll 39% of residential customers in E-billing and 20% of residential customers in AutoPay.</p>
<p><i>Employee Learning &amp; Growth:</i>  <b>Advance Workforce Safety</b></p>	<p><b>Goal – Safety: Achieve zero recordable injuries</b>            ✓ Reduce workplace hazards by researching best-in-class corporate safety practices and deploying a plan that decreases recordable injuries to zero.</p>
<p><i>Employee Learning &amp; Growth:</i>  <b>Develop Employees by Improving Knowledge, Skills and Abilities</b></p>	<p><b>Goal – Succession Planning: Implement succession planning and knowledge capture that addresses 75% of the potential loss of institutional knowledge by May 2025</b>            ✓ Conduct a needs analysis to identify mission-critical roles at risk of retirement over the next 1-3 years and implement a Talent Matrix that addresses 50% of the potential loss of knowledge, skills and abilities.</p>
<p><i>Employee Learning &amp; Growth:</i>  <b>Foster a Diverse, Inclusive and Engaged Workforce</b></p>	<p><b>Goal – Engagement: Grow workforce engagement to strengthen commitment to the organization and individual success as evidenced by a 20% increase in an Employee Engagement Survey by May 2025</b>            ✓ Implement an employee participation plan that drives engagement and gauge employee sentiment by demonstrating a 10-percentage point annual improvement over FY23 Cooleaf employee survey baseline of 75.5%.</p>
<p><i>Financial:</i>  <b>Expand Commercial Revenue Sources to Mitigate Rate Increases</b></p>	<p><b>Goal – Commercial Enterprises: Increase commercial service net revenue to \$9.2 million by May 2025</b>            ✓ Deploy Well Services products and PipeSafe partnerships and integrate 2 acquisitions to achieve a \$7.4 million budget.</p>
<p><i>Internal Business Process:</i>  <b>Effectively Manage and Maintain Our Core Business</b></p>	<p><b>Goal – Asset Management: Ensure 100% of our assets are linked to an enterprise asset management system by May 2025</b>            ✓ Map the remaining 50% of vertical assets and develop a comprehensive preventative maintenance program that focuses on the integrity of our 35 pump stations.            ✓ Define the number of customer-side lead service lines and develop a communications strategy and work plan to replace lead pipe.</p>
<p><i>Internal Business Process:</i>  <b>Sustainably Manage Our Natural Resources to Deliver Reliable, Clean, Safe Water</b></p>	<p><b>Goal – Water Quality: Ensure levels of disinfection by-products are at least 10% below regulated limits by May 2025</b>            ✓ Protect raw water quality standards by employing 3 new high-gain areas for natural resource and infrastructure management: 1) protect 1 additional watershed; 2) utilize new technology/infrastructure to guide management of Lake Saltonstall raw water quality; 3) identify 2 distribution localities that would benefit from auto-flushing            ✓ Complete an evaluation of alternative PFAS remediation techniques for South Cheshire wellfield and determine the</p>

# Customer & Constituents Perspective

STRATEGY	FY24 INITIATIVES
<b>Improve Customer Satisfaction</b>	<ul style="list-style-type: none"><li>• Reduce the number of <b>customer water-quality complaints</b> 10% from a baseline average of 610 complaints a year through <b>flushing improvements and increased system maintenance</b>.</li></ul>
<b>Utilize Technology to Enhance the Customer Experience</b>	<ul style="list-style-type: none"><li>• Achieve 100% of <b>Project RWAY's 3 key phase gates</b> on time to ensure success of <b>CIS implementation</b>: Phase 1) analysis, OCM and UMAX installation (Q1 FY24); Phase 2) design and data migration scope (Q2 FY24); Phase 3) development and integrated system test design (Q3 FY24).</li><li>• Enroll 39% of residential customers in <b>E-billing</b> and 20% of residential customers in <b>AutoPay</b>.</li></ul>

# Employee Learning & Growth Perspective

## STRATEGY

## FY24 INITIATIVES

### Advance Workforce Safety

- Reduce workplace hazards by researching **best-in-class corporate safety practices** and deploying a plan that **decreases recordable injuries to zero**.

### Develop Employees by Improving Knowledge, Skills and Abilities

- Conduct a needs analysis to identify **mission-critical roles at risk of retirement** over the next 1-3 years and implement a Talent Matrix that addresses 50% of the potential **loss of knowledge, skills and abilities**.

### Foster a Diverse, Inclusive and Engaged Workforce

- Implement an **employee participation plan** that drives engagement and gauge employee sentiment by demonstrating a 10 percentage-point annual improvement over FY23 Cooleaf **employee survey** baseline of 75.5%.

# Financial Perspective

## STRATEGY

**Expand Commercial Revenue Sources to Mitigate Rate Increases**

## FY24 INITIATIVE

- Increase commercial revenue to invest in core utility and mitigate water rate increases by deploying **Well Services' products and PipeSafe partnerships** and integrating **2 acquisitions** to achieve a \$7.4 million budget.

# Internal Business Perspective

## STRATEGY

## FY24 INITIATIVES

### Effectively Manage and Maintain Our Core Business

- Map the remaining 50% of **vertical assets** and develop a comprehensive **preventative maintenance program** that focuses on the integrity of our **35 pump stations**.
- Define the number of **customer-side lead service lines** and develop a **work plan** to replace lead pipe.

### Embrace Innovation and New Technology

- Protect **raw water quality standards** by employing 3 new high-impact areas for **natural resource and infrastructure management**: 1) protect 1 additional watershed; 2) utilize new technology/infrastructure to guide management of Lake Saltonstall raw water quality; 3) identify 2 distribution locales that would benefit from solutions including auto flushing, main extensions, bleeders and more.
- Complete an evaluation of **alternative PFAS remediation techniques** for South Cheshire wellfield and determine the most **cost-effective solution**.

# Fiscal 2024 Global Metrics & Board KPIs

KPI	Description	Target	Level
<b>Customer Satisfaction</b>	Maintain RWA's Customer Satisfaction Index at 91.8% (+/- 2% margin of error)	<b>91.8% (+/- 2% margin of error)</b>	Global
<b>Community Engagement</b>	Achieve at least 40% employee participation at 3 RWA-sponsored community engagement programs/events.	<b>40% Employee Participation @ 3 RWA-Sponsored Community Events</b>	Global
<b>Safety</b>	Continue the safety journey toward achieving zero recordable injuries.	<b>0 Recordable Injuries</b>	Global
<b>DE&amp;I/Employee Engagement</b>	Achieve at least 80% employee participation at 3 DE&I/wellbeing programs/events.	<b>80% Employee Participation @ 3 All-Employee Events</b>	Global
<b>Cash Collections</b>	Meet 118% coverage with no shortfall.	<b>&gt;118% Coverage</b>	Global
<b>Capital Efficiency</b>	Ensure that at least 96% of capital budget benefits customers.	<b>96% of Capital Budget</b>	Global
<b>Operating Efficiency</b>	Identify at least \$750,000 in annualized operating efficiencies and savings.	<b>\$750,000</b>	Global
<b>Service Training</b>	Certify that 100% of employees complete internal/external customer service training on schedule.	<b>100% Participation</b>	Global
<b>Commercial Services Revenue</b>	Achieve commercial net revenues of \$7.4M in FY24 to support overall target of \$9.2M for FY25.	<b>\$7.4M in Revenue</b>	Executive
<b>Water Quality</b>	Maintain 100% compliance with drinking water standards by ensuring that 90% of disinfection by-product tests are at least 10% below maximum drinking water thresholds	<b>100% Compliance</b>	Executive
<b>Unaccounted for Water</b>	Reduce unaccounted for water leakage by 100MG, resulting in savings of approximately \$700,000.	<b>100MG Reduction</b>	Executive



Regional **Water** Authority  
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**South Central Connecticut Regional Water Authority**  
 90 Sargent Drive, New Haven, Connecticut 06511-5966  
<http://www.rwater.com>

To: Authority Strategic Planning Committee  
 David J. Borowy  
 Kevin J. Curseaden  
 Catherine E. LaMarr  
 Suzanne C. Sack

Cc: Larry Bingaman, President & CEO

From: Prem Singh, VP Customer Care & Chief Information Digital Officer

Date: June 22, 2023

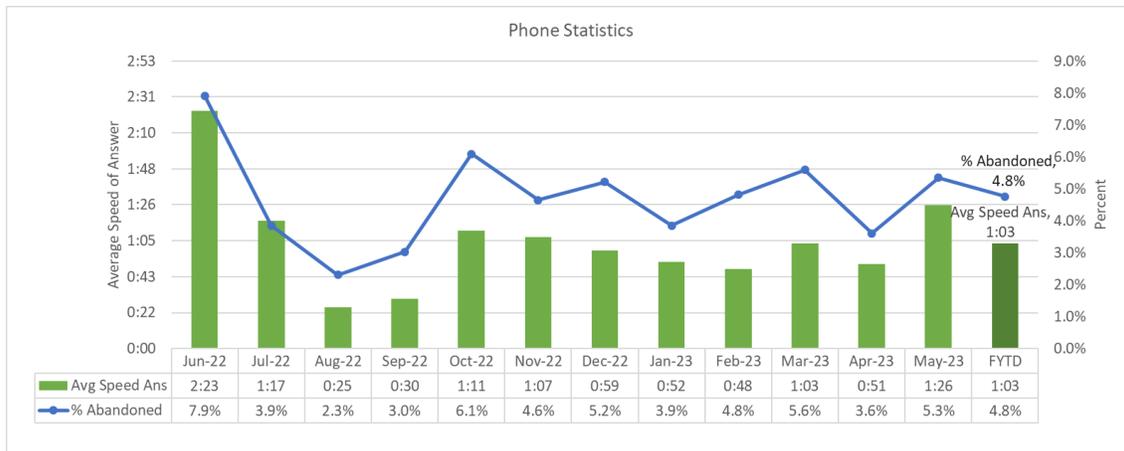
Subject: Fiscal 2023 Customer Service Experience & Collections Strategy Update

The RWA Customer Care continues to support our customer calls, track and measure customer experience, and drive our collections strategy.

**1. Contact Center Results**

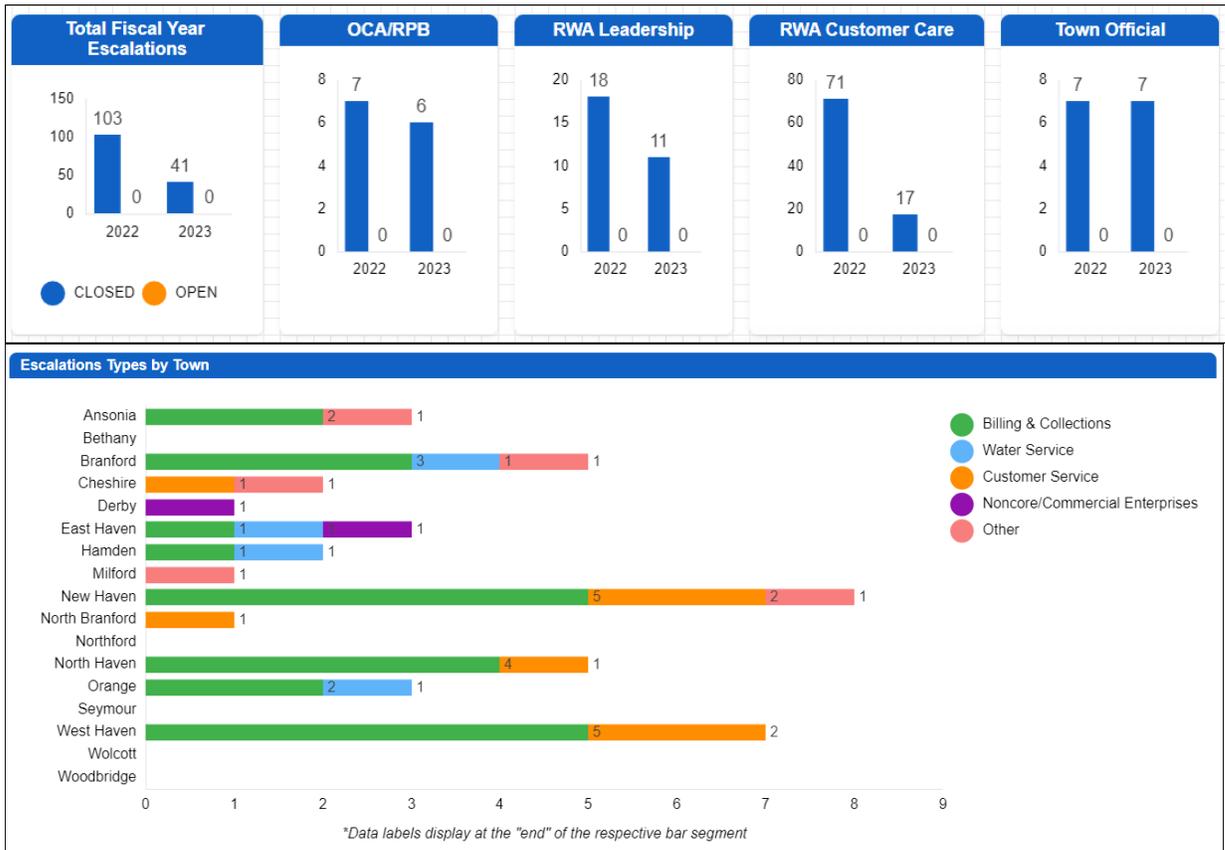
- The team handled over 73,000 customer calls in FY23 and successfully met the key metrics of Average Speed of Answer and Abandoned Calls %.

Average Speed of Answer    63 Seconds    Better than Target of 70 Seconds  
 % Abandoned Calls        4.8%                            Better than Target of 5%



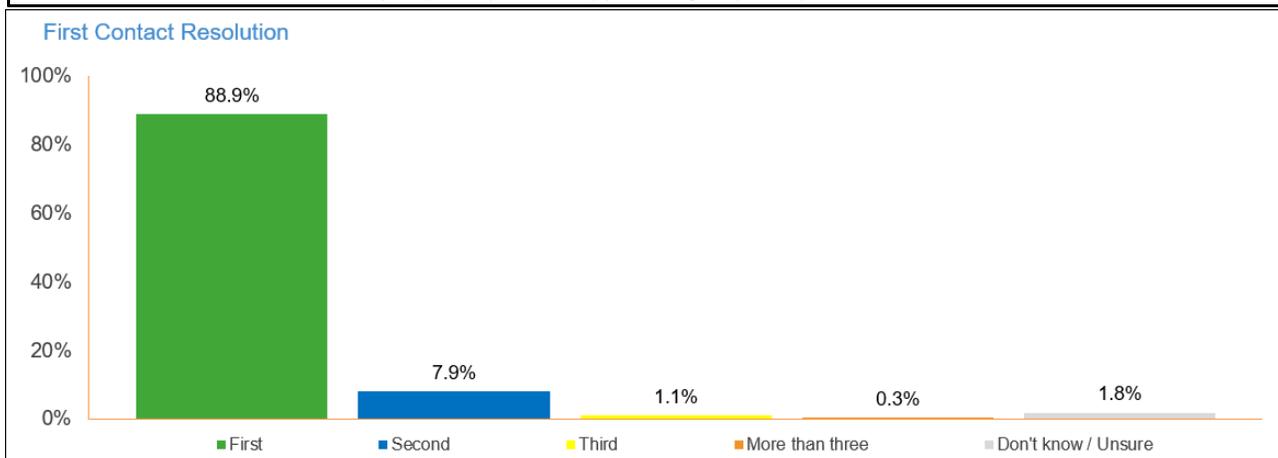
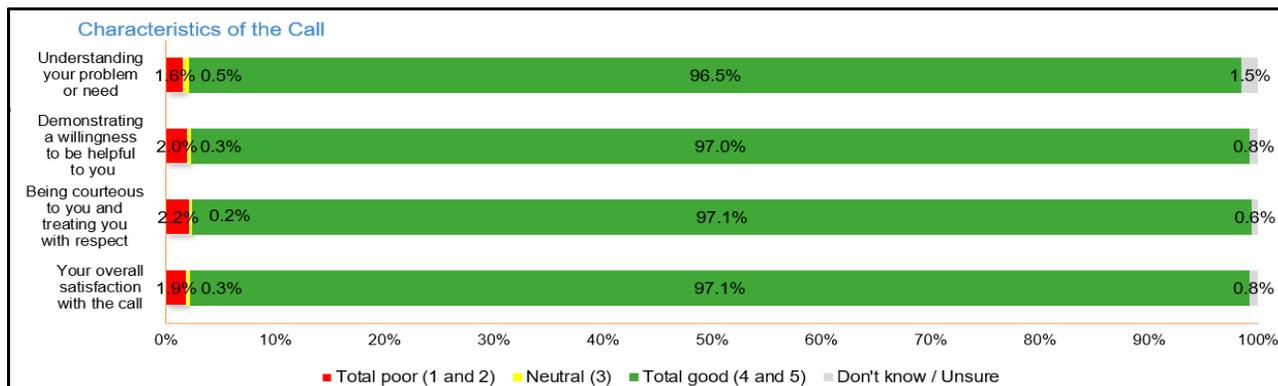
**2. Customer Escalations**

- In FY23, we resolved 41 customer escalations, far fewer escalation than the 103 escalations 2022 as both employees and customers have become more comfortable with monthly billing and self-service options.
- The team closed 65% of the escalations within 5 days, averaging 9 days for the fiscal year. Those escalations taking longer than 5 days generally involved complex billing and negotiations, as well as coordination with 3<sup>rd</sup> parties with timely customer communications.



### 3. Complete - FY23 IVR Customer Transaction Survey Results

- The primary goals for this research study were to assess satisfaction levels immediately after working with the contact center employees. In Fiscal Year 2023, 655 customers provided input to the Satisfaction and First Contact Resolution results.
- Over 80% of customers in contact with RWA customer service indicated the reason for their contact was a “billing related question” (81.1%), followed by 7% for start/stop service.
- More than nine-out-of-ten RWA customers indicated the customer service representative they spoke with was “courteous to you and treated you with respect” (97.1%), for their “overall satisfaction with the call” (97.1%), that the representative “demonstrated a willingness to be helpful” (97.0%), and for the rep “understanding your problem or need” (96.5%).
- The strong majority of RWA customers in contact with customer service, 88.9%, indicated the person they worked with on the call was the “first” person they spoke with, while less than one-in-ten customers (7.9%) indicated it was the second person and only 1.1% reported it was the “third” person.
- Impressively, the strong majority of RWA customers in contact with customer service, 98.6%, indicated their issue or need was resolved to their satisfaction.



#### 4. **Planned - FY24 Customer Satisfaction Initiatives**

- The Annual Customer Survey is planned for Spring of 2024
  - The Annual CSI survey would, similar to years past, be conducted to coincide with the annual Water Quality Report. The planned questionnaire is a very similar format to the 2019 Study.
  - The streamlined format has been vetted with best practices & approach considered by other utilities and will include a combination of Company characteristics & Brand image, communication preferences, customer service, field service, water quality, RWA programs and services and demographics.
  - We would transition from 100% outbound telephone surveys to a Hybrid methodology using outbound telephone surveys combined with a digital (email/URL) format. We are also considering the use of an inbound 800# were deemed necessary.
- Transactional Surveys
  - Start New Field Survey- We will introduce a new real-time digital Field Service survey. The mechanism will be a leave-behind postcard with a QR code/URL that customers can quickly provide input on their field personnel experience. This is planned due to our continued success and monitoring of Customer Care transactional survey.
  - Continue IVR survey - We will continue to utilize the IVR Customer Transaction survey to capture real-time phone interaction CSI.
  - Transactional surveys help to establish some baseline data to inform the internal cross functional Customer Service training initiative planned to launch in late fall 2023 partnered with Moran consulting.

**Board Discussion:** What Customer Experience improvements would the Board like to see in FY24 and as we move into the new CIS solution?

# Strategic Planning Committee

## June 22<sup>nd</sup> 2023

### Special Topics

Customer & Constituents- Collections Strategy

# Collection Tools



On Bill Notice



Termination of Service



Delinquency Calls



Automated Call List



Formal Liens



Champion/Challenger



Shut/Delinquency

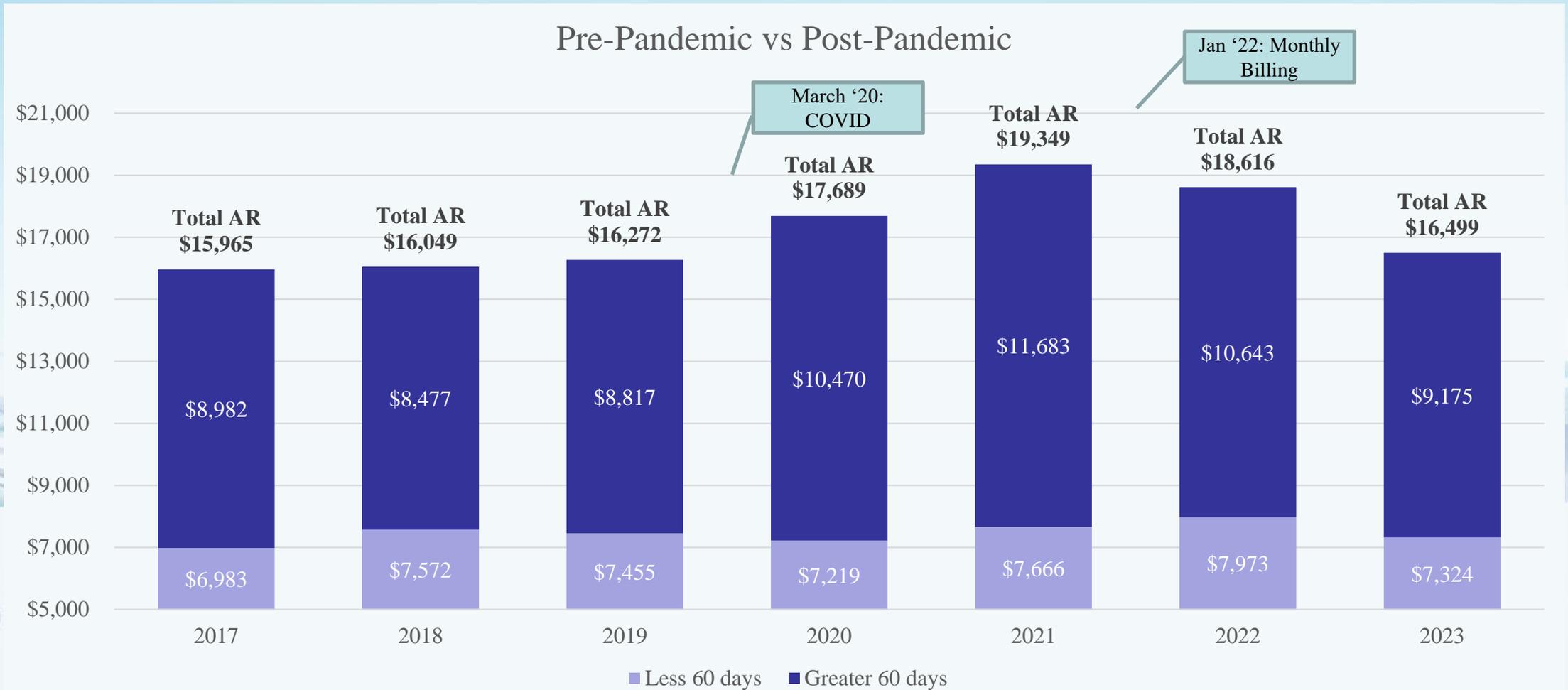


Receivership

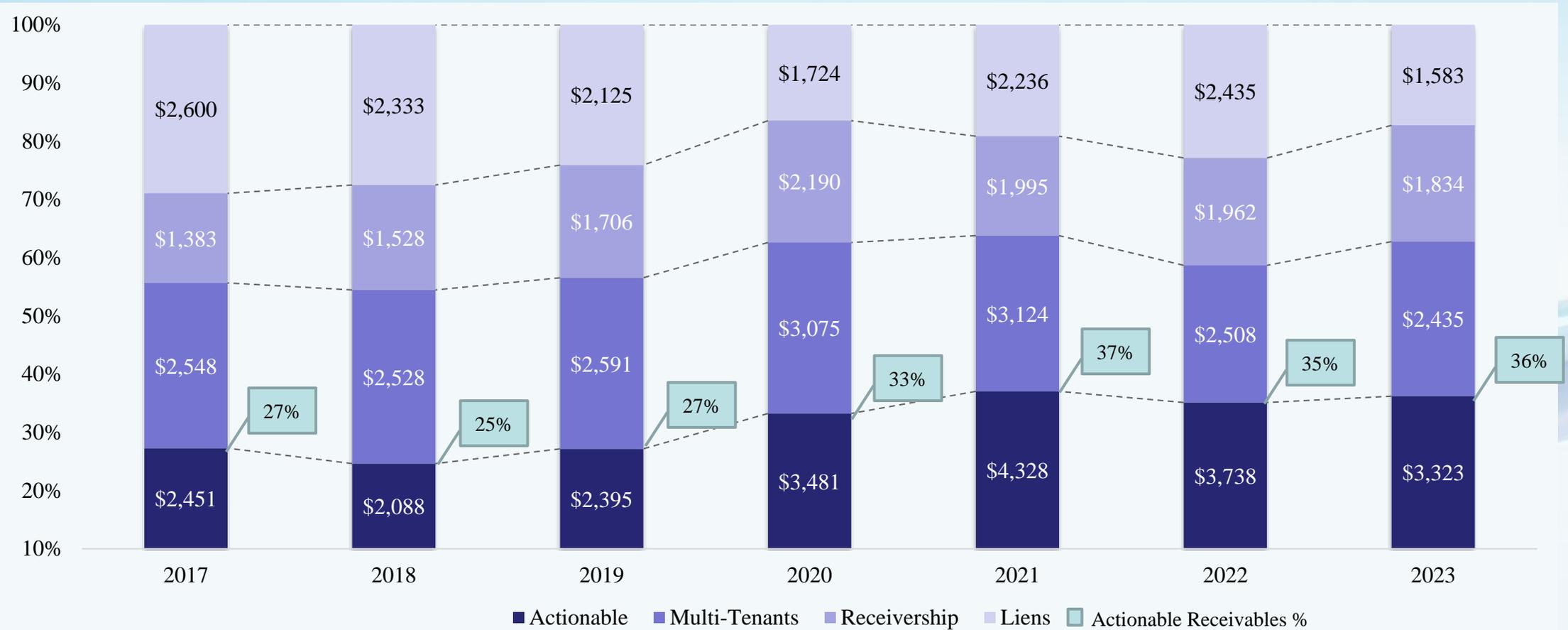


Collections Email

# Fiscal Year-End Total Accounts Receivable



# Accounts Receivable Greater than 60 days



# FY23 Target to Actual Monthly Collections



# FY23 Customer Assistance Payments



# Next Steps / Actions

- Explore and implement improvements to the formal lien process
- Continue to promote available assistance programs to financially challenged customers
- Expand automated and manned outbound calling
- Promote autopay options
- Continue to assess and develop the Collections Toolbox, employing the most effective techniques.

# Questions?