



Water & Wastewater UTILITIES

2025

STRATEGIC PLAN



TABLE OF CONTENTS

3

A MESSAGE FROM THE DIRECTOR

4

ABOUT THE DEPARTMENT

4

INDUSTRY TRENDS

6

FAST FACTS

7

THE STRATEGIC PLANNING PROCESS

8

STAKEHOLDER FEEDBACK

9

THE STRATEGIC FRAMEWORK

10

IMPLEMENTATION





A MESSAGE FROM

THE DIRECTOR

The residents and businesses of Winter Park and unincorporated areas of Orange County – our customers – have high expectations for their water and wastewater service. At a minimum, our services need to be safe, clean, and uninterrupted; but there's so much more to utility service than that.

Utilities across the state and country face significant challenges in continuing to provide high-quality products and services. Regulatory requirements are complex, and compliance is increasingly resource intensive. Utilities face considerable competition when attracting and retaining skilled workers, and both organizational and employee needs are evolving fast. Water and wastewater resources and treatment capacity are limited, which requires a regional approach to address in the context of growth and economic development.

In many ways, Winter Park's Water and Wastewater Utilities Department is fortunate. Over the almost three decades that I've been with the City, we have leveraged our financial resources successfully to maintain and improve our infrastructure. We've been on the front lines of using technology to enhance our operations and our customer experience and will continue to do so as we roll out a new customer portal in the coming months. We have also benefited from a committed and talented workforce, which has consistently looked for opportunities to be responsive to customer needs, to use their skills in innovative ways, and to create a positive workplace culture. I am incredibly proud of our Utilities team.

This strategic plan recognizes the challenges we face and the environment in which we operate. It builds on the investments already in place and identifies opportunities for our department to improve and go beyond what we've done in the past to support our customers and service area. It incorporates input and feedback from the Utilities Advisory Board, other City departments that work with Utilities, and Utilities employees.

As always, the Water and Wastewater Utilities are dedicated to providing the highest quality water and services in a safe, reliable, sustainable, and efficient manner. Our community deserves no less.



DAVID ZUSI

Director



About the Department

The Winter Park Water and Wastewater Utilities Department (the Department) operates as an enterprise fund committed to providing essential water and sewer services for a 23-square mile service area, including the City of Winter Park and some unincorporated areas of Orange County in the State of Florida. The water source for the Department is groundwater from the Floridan aquifer.

The Department, funded solely by ratepayers, is dedicated to providing customers with the highest quality water and utility services in a safe, reliable, and efficient manner, with care and concern for the environment. With a team of approximately 120 dedicated employees, the Department serves more than 24,000 customer accounts, ensuring their water and sewer needs are met. By ensuring the availability of safe drinking water and effective sewer treatment, the Department plays a pivotal role in safeguarding public health, supporting the well-being of residents, and fostering economic development within its designated service area.



23sq. mile
SERVICE AREA



120
DEDICATED EMPLOYEES



24,000
CUSTOMER ACCOUNTS

Industry Trends

To achieve continued success, the Department must address industry and regional trends as it works to implement its Strategic Plan. To do so, the Leadership Team reviewed a series of trends and determined how each trend currently impacts the organization by either supporting or inhibiting the organization, and how those trends might impact the Department in the future. The following key trends helped guide the development of the Strategic Plan.

TREND 1

POPULATION

The Water and Wastewater Utilities provide water and wastewater service to customers within the City limits and in unincorporated Orange County. While the City is mostly built out, redevelopment, typically with more intensive use, is occurring in some areas and increased growth in unincorporated Orange County is anticipated. The Department recognizes a need to improve communication and awareness-building with Orange County to streamline development processes, as well as plan for addressing system capacity concerns from the Water Management District.

TREND 2

LOCAL COMMUNITY

The City tends to be progressive, and much of the community is focused on environmental concerns. The Commission has a positive perception of the Utility, and with potential regulatory cost increases on the horizon, building awareness and understanding at the Commission level will be important. The Department is aware of potential regulatory changes to outside city surcharge rate methodologies at the state level, and is working to understand potential impacts for Winter Park.



TREND 3

ENVIRONMENTAL ISSUES AND REGULATIONS

The Department is complying with Lead and Copper Rule-related requirements by completing an inventory of lead service lines and is incentivizing septic-to-sewer conversion in the business corridor to support growth and redevelopment and to stay ahead of potential state-mandated conversion. With permitted groundwater withdrawal limited, the Department will need to plan for ways to reduce per capita water usage, possibly through encouraging the use of lower-quality for irrigation. The organization will continue to monitor and respond appropriately to regulatory changes.

TREND 4

WORKFORCE

While the Department has recently hired many new staff, bringing the vacancy rate down to approximately 10%, attracting and retaining candidates with appropriate experience is difficult. The Utility recognizes a need for increased cross-training and safety programming across the organization, as well as a need to assess workforce capacity and succession planning, as the organization has limited resources.

TREND 5

TECHNOLOGY

The organization has effectively leveraged technology, with fiber infrastructure at nearly all Department facilities, a new enterprise resource planning (ERP) system, and an advanced metering infrastructure (AMI) system. Once the Department has fully integrated its new ERP software with the existing AMI system, it will begin pursuing the creation of a meaningful customer portal to increase customer awareness and transparency around billing and usage.

TREND 6

CUSTOMER EXPERIENCE

The Department strives to provide a high level of service to meet community expectations, and overall, customers have a positive perception

of the organization. The Department plans to improve customer billing following its technology implementation and is confident in its ability to maintain a high level of service while recognizing potential constraints related to workforce issues and awareness of regulatory issues.

TREND 7

FINANCIAL CONSIDERATIONS

The Department brings in approximately \$40 million in revenue annually and maintains a healthy cash balance and debt service coverage ratio. Additionally, as the utility has a construction services division, a substantial amount of capital work is done in-house allowing for major cost savings for the Department. Despite this, there are growing operational and infrastructure needs, and capital needs from bulk/wholesale providers are difficult to predict, resulting in concerns about sufficient capital capacity. Because the City is mostly built-out and the Department is not expected to be able to increase its permitted withdrawal capacity, there are challenges with revenue growth ability. Currently, the Department increases rates annually based on the Florida Public Service Commission (FPSC) index. Due to rising costs, the Department seeks to prioritize more formalized budget and finance planning and strategies to ensure a fiscally sustainable future for the organization.

TREND 8

INCREASED RISK PROFILE

The City and the Department's service area is vulnerable to extreme weather events, specifically large storms which can cause major flooding and sanitary sewer overflows, and preventative maintenance and preparation for these events has resulted in budgetary impacts. Cybersecurity is a growing concern, especially regarding customer information. To address these issues, the Department completed a vulnerability assessment as required by the America's Water Infrastructure Act (AWIA) and has implemented the recommendations provided by the assessment. Additionally, the Department plans to focus efforts on implementing a formal workforce safety training program.



The Strategic Planning Process

In July 2024, the City of Winter Park's Water and Wastewater Utilities Department initiated a process to develop the organization's first Strategic Plan. This plan outlines the organization's top priorities for the next few years, acting as a roadmap to drive the Department toward its desired future state by aligning resources with long-term goals.

THE DEPARTMENT'S STRATEGIC PLANNING PROCESS WAS DESIGNED TO ENSURE:

- Open communication with staff and the Utility Advisory Board (UAB) with regular updates throughout the strategic planning process.
- Alignment of the strategic plan with long-term financial planning.
- Creation of a product that enhances stakeholders' awareness of utility operations and value that can be implemented in the years to come.

TO ACHIEVE THIS, THE DEPARTMENT'S STRATEGIC PLANNING PROCESS INCLUDED:

- Engagements with both internal and external stakeholders to gather insights used to shape the Strategic Plan, including one-on-one interviews with the Leadership Team, supervisors, other City stakeholders, and multiple focus groups with Department employees.
- A kick-off meeting with the Leadership Team to identify goals for the strategic planning process and discuss key trends in the industry impacting the organization.
- A strategic planning workshop where the Leadership Team reviewed stakeholder input to guide the establishment of the Strategic Plan.
- A strategic planning workshop where the Utility Advisory Board reviewed and provided feedback on the key trends impacting the organization, input from stakeholders, and the draft Strategic Plan framework.
- A strategic plan implementation workshop in which the Leadership Team identified workplans and key performance indicators to ensure progress can be tracked and measured.

Stakeholder Feedback

ASPIRATIONS, STRENGTHS, OPPORTUNITIES, AND CRITICAL ISSUES

Stakeholder input is essential to ensuring that the mission and vision are aligned with the organization's day-to-day reality and how stakeholders perceive the organization. Engaging with the Leadership Team, Department supervisors and frontline employees, and City stakeholders, the Department obtained valuable insights into stakeholders' aspirations for the organization, identified its greatest strengths and opportunities, and gained an understanding of critical issues facing the organization.



ASPIRATIONS

- Maintain excellent service delivery and customer experience
- Proactive and prioritized capital asset management
- Be an organization of choice for employees
- Provide training programs for staff and create culture of safety
- Increased open communication and engagement within the organization and larger community



STRENGTHS

- Provide excellent customer service and high-quality services
- Collaborative and dedicated employees within the organization
- In-house construction services which enable major financial savings
- Emergency response
- Consistent infrastructure investment
- Strong communication and supportive culture



OPPORTUNITIES

- More training opportunities, recognition, and support for staff
- Expanded communication and awareness-building efforts to help the community understand the value of the Department's services
- Increased capital planning and asset management
- Improved internal processes and communication to facilitate increased operational efficiency



CRITICAL ISSUES

- Addressing workforce challenges, including retaining and attracting talented staff, assessing workforce capacity, and succession planning
- Assessing, planning, and preparing for capital needs, specifically project funding and prioritization
- Ensuring sufficient capacity for growth and to meet regulatory needs
- Leveraging and integrating different technology systems

The Strategic Framework

VISION

To provide premier services that advance the Winter Park Utilities' water resources, quality workforce, resilient infrastructure, and thriving community.

MISSION

The Water and Wastewater Utilities are dedicated to providing the highest quality water and services in a safe, reliable, sustainable, and efficient manner.

VALUES

Our employees are our most valued asset. In addition to living the City's core values every day, our team demonstrates:



Collaboration



Responsiveness



Excellence



Dedication

Strategic Framework



STRATEGIC PRIORITIES

Workforce Development

To attract and retain a regional- and industry-leading team by focusing on workforce safety, access to training opportunities, competitive compensation, and employee engagement.



Water Resources

To promote sustainable water resource management by meeting regulatory requirements, providing sufficient capacity, mitigating water quality risks, and encouraging customers to use water wisely.



Customer Relationships

To demonstrate the Department's culture of customer service through best-in-class customer interactions, streamlined service processes, and responsive problem-solving.



Communication and Outreach

To build stakeholder understanding and support for the utility through internal and external education and awareness campaigns; regular outreach and information-sharing; and effective emergency communication.



Operational Optimization

To leverage existing and emerging technologies and other organizational resources to continuously improve the Department's workflows, procedures, and data-driven decision-making processes.



Resilient Infrastructure

To ensure effective asset management, reliable infrastructure systems, and collaboration with other agencies to plan for regional needs.



Responsible Budgeting and Finance

To fund operational and capital needs by balancing utility rates and alternate revenue sources, maintaining healthy reserves, and adhering to sound financial policies.

STRATEGIES

MEASURES

1. Partner with City HR to advance utility specific policies and approaches, including utility-specific position descriptions, to attract and retain a qualified workforce.
2. Expand workforce safety training, programming, and resources.
3. Improve communication and information flow to build awareness across divisions, other Departments, and key stakeholders.
4. Expand celebration and recognition related to work success.

- Average Time to Fill Key Vacancies (days)
- Vacancy Rate (%)
- Voluntary Turnover (%)
- Retirement Eligibility (%)
- Average training hours per employee

1. Implement the next phase of the Lead and Copper Rule requirements.
2. Monitor and prepare to respond to impending regulatory requirements (e.g. PFAS, DBP rule, septic-to-sewer conversions).
3. Expand conservation programming and messaging through website articles, newsletters, customer water audits, conservation rebates, etc.
4. Implement the requirements of Winter Park's consumptive use permit, including expanded reclaimed water capacity to offset potable water use.

- Non-revenue water
- Per capita water usage
- Available treatment capacity (water and sewer)
- % LCR unknowns
- Regulatory compliance

1. Evaluate target service levels and ensure appropriate staff and resources.
2. Implement and resource the Department's program to inspect, monitor, and coordinate private lift station customers.
3. Develop training for employees who are in customer-facing roles.
4. Better leverage technology to streamline information sharing, both internally and with customers.

- # of customer calls
- Average wait time
- Customer service complaints

1. Build internal and external visibility of water and wastewater through regular collaboration with the Winter Park Communications Department.
2. Expand the engagement boundaries for the reverse 911 system to better communicate with non-city residents during emergencies.
3. Hold topic specific all-hands-on meetings with utility employees.

- Public education and outreach events (#)
- Social Media Followers/ Impressions (#)
- Opt-in Rate for the reverse 9-1-1 system

1. Complete field data input and integration in GIS to support modeling.
2. Implement work order management and CMMS for water and wastewater systems.
3. Eliminate paper-based processes for field operations.
4. Expand data analytics capabilities within water and wastewater utilities.

- Ratio of preventative maintenance to reactive maintenance
- % of processes to go paperless
- Emergency Response Readiness Training Hours
- % of system digitized in GIS

1. Prepare for and respond to infrastructure needs identified through storm events.
2. Improve distribution and collection system through continuous evaluation, smart city technology, and targeted replacement and rehabilitation.
3. Develop a meter replacement program to address end-of-life meters and billing accuracy.
4. Pursue opportunities to accelerate the lift station replacement plan and improve communication and telemetry with lift stations.
5. Develop a wastewater master plan.

- Water & Sewer Main Replacement & Rehabilitation (% of system length, linear feet)
- Water & Sewer Breaks per 100 miles

1. Implement OpenGov to support project tracking and accountability.
2. Review and revise financial policies and targets to be prepared to address significant projects and regional needs.
3. Review, benchmark, and revise rates and impact fees to ensure sufficient cost recovery.

- Bond rating
- Avg. Bill per Residential Customer
- O&M Cost per Account and FTE
- Days Working Capital
- Capital Spend (as % of total assets)

Fast Facts



Provides
4.1 billion gallons
of water per year



Treats approximately
3 billion gallons
of wastewater per year



Maintains
470 miles
of water, sewer, and
reclaimed mains



Produces more than
150 million gallons
of reclaimed water per year



The Winter Park Water Treatment Plant ensures clean, safe drinking water for the community. Through a multi-step process, raw water is treated to remove impurities and contaminants, providing reliable drinking water for residents and businesses.

