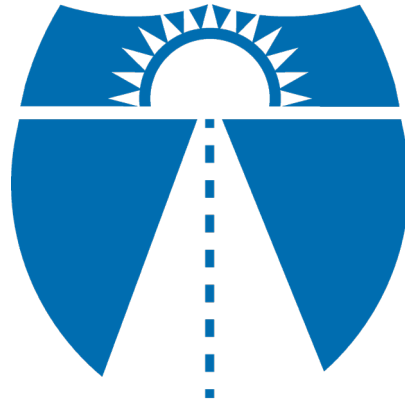


Roadmap Workbook 2020





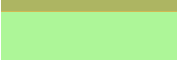

Introduction

Welcome to the draft Roadmap Workbook, which includes resources and a methodology for creating a roadmap that connects to the Clean Water Services Strategic Approach.

Roadmap development is iterative, with each step in the process connected to the others. In some cases, different individuals or teams might take the lead in different steps in the process. Some teams may use tools in addition to this workbook to develop their roadmaps. Ultimately, the roadmaps will be translated into ClearPoint, our performance management software, to help track their progress and interrelatedness.

The Business Strategy & Performance Systems team is here to help, in person, by phone or via email. Visit the Strategic Approach section of CWS SharePoint or contact Ryan Locicero directly.

Process:

	Purpose Statement
	Current & Future State Assessment
	Objectives & Objective Statements
	Strategic Perspectives
	Strategy Map
	Measures
	Initiatives
	Action Plan
	Roadmap

Common Terms:

Objective: Describes what you are trying to achieve.

Measure: Tells you if we are on track and if we are meeting our objectives.

Initiative: Tells us how we will accomplish our objectives.

Action Plan: Describes how we will delegate tasks to complete the initiatives.

Purpose Statement: Describes the specific goal, advantage, and scope of a roadmap.

Current State: A streamlined list of something your team is considering improving or changing.

Future State: Your team's understanding of what will improve or change when the purpose statement is realized.

Strategic Perspectives: A way to categorize objectives that drive change and objectives that result in outcomes. This can also be thought of as "what we are doing as an organization to realize the future state" and "what the region is receiving as a result of our action."

Strategy Map: A framework used for tracking and managing your roadmap. The strategy map helps you see how different objectives affect different areas of the business and how all of those things are tied back to a unified strategy.





Purpose Statement

A purpose statement describes the specific goal, advantage and scope of a roadmap. This statement allows your team and the workforce to know what to expect from the roadmap.

<p>The goal should be numerical, like increasing retail and wholesale water reuse by 500% over the next five years.</p>	<p>What is your Goal?</p>	<hr/> <hr/> <hr/> <hr/>
<p>The advantage should be something that sets your team apart from the current practice and puts your team in a favorable position to succeed. For example, your team may have a successful track record of collaborating with stakeholders and educating the public.</p>	<p>What is your team's Advantage?</p>	<hr/> <hr/> <hr/> <hr/>
<p>You can't do everything and if you try, you will fail. The scope is where you draw the system boundary and determine what you will and won't do.</p>	<p>What is your Scope?</p>	<hr/> <hr/> <hr/> <hr/>

EXAMPLE:

Purpose Statement: We will increase water reuse from 1 MGD to 5 MGD by 2025 by collaborating with stakeholders and educating the public to secure compliance with thermal loading requirements as the Scoggins Dam project and availability of offset releases from Hagg Lake are uncertain.

Draft your purpose statement:





Current & Future State Assessment

The current and future state assessment is a streamlined list of something your team is considering improving or changing and what will improve or change when the purpose statement is realized.

Current State

The team should assess the current state of understanding or awareness of something your team is considering improving or changing.

Future State

Keep it simple and be direct. The team should identify the future state and what will improve or change when the purpose statement is realized.

EXAMPLE:

Current State

CWS owns 800 acres of impacted wetlands.

Future State

Jurisdictional wetland flow enhancement/
restored hydrology up to 3MGD.

Current State

Future State

Current State

Future State

Current State

Future State

Current State

Future State





Objectives & Objective Statements

Objectives describe what we are trying to achieve and what we are going to do to make this change happen. Follow the “Verb (Action) + Adjective (Description) + Noun (Result)” format to create three-to-four word objectives.



Objective Statements: Translate the objectives into two to three sentences. Clearly articulate the intent and meaning of the objective and include how you will make this change happen.

EXAMPLE:



Objective Statement: We will enhance and restore jurisdictional wetland hydrology and achieve Tualatin River water quality objectives through riparian buffers. We will do this by defining new quantitative measures for habitat improvements and developing a schedule for delivering and monitoring of reuse water to historically impacted wetlands.

_____	+	_____	+	_____
-------	---	-------	---	-------

Objective Statement: _____

_____	+	_____	+	_____
-------	---	-------	---	-------

Objective Statement: _____

_____	+	_____	+	_____
-------	---	-------	---	-------

Objective Statement: _____





Strategic Perspectives

Roadmap objectives can be categorized into two groups, "What we are doing" and "What we are getting" across five strategic perspectives. Each of the four perspectives is associated with a question. Review each objective statement while asking yourself the question and assign a strategic perspective to each of the objectives.

What we are getting

Environment Perspective

If we succeed, how will we impact the environment?

Financial Perspective

If we succeed, how will we look to our ratepayers?

Customer Perspective

What do our customers expect from us?

What we are doing

Product, Service or Process Perspective

To satisfy our customers, at which process must we excel?

People & Culture

To be successful, how must our organization learn and grow?

Action + Description + Results
(Objective)



Strategic Perspective
(Perspective)

EXAMPLE:

Enhance/Restore Impacted Wetlands



Environmental Perspective







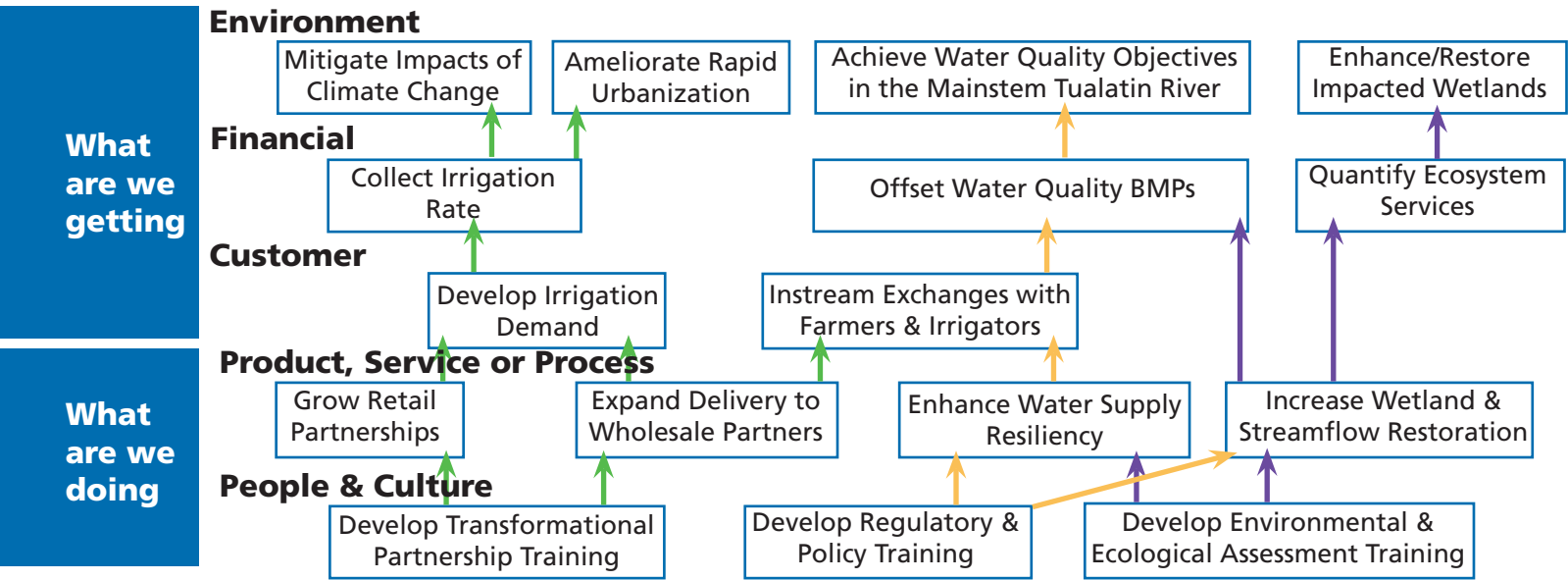




Strategy Map

Here you will map each objective to a strategic perspective and link the objectives to each other. Put each objective in one box, in the strategic perspective to which it most closely relates. Read through the map to see if the links are logical and if you understand how the success or failure of an objective will affect the entire strategy.

EXAMPLE:



What are we getting	Environment	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Financial	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Customer	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Product, Service or Process	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
What are we doing	People & Culture	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
	People & Culture	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>





Measures: Name & Description

You should create one or two measures per objective. Each measure will describe an outcome or driver based on the unique perspective it represents. Name each measure and describe what each measure should reveal.

EXAMPLE:

Environment Perspective

Objective Name:

Measure Name:

Description:

Outcome Measures
"How would I know?"

Environment Perspective

Objective Name:

Measure Name:

Description:

Financial Perspective

Objective Name:

Measure Name:

Description:

Customer Perspective

Objective Name:

Measure Name:

Description:

Product, Service, or Process Perspective

Objective Name:

Measure Name:

Description:

People & Culture

Objective Name:

Measure Name:

Description:

Driver Measures
"What do we need to do well?"





Measures: Targets

Set a stretch target for three to five years into the future, then create annual and quarterly targets. Targets can be derived from the purpose statement, benchmarking industry leaders, historical performance and baseline data.

EXAMPLE:

Environment Perspective

Measure Name:

3-5 Year Target	Annual Target	Quarterly Target
3,000,000 GPD	600,000 GPD	150,000 GPD

Outcome Measures
"How would I know?"

Environment Perspective

Measure Name:

3-5 Year Target	Annual Target	Quarterly Target
<input type="text"/>	<input type="text"/>	<input type="text"/>

Financial Perspective

Measure Name:

3-5 Year Target	Annual Target	Quarterly Target
<input type="text"/>	<input type="text"/>	<input type="text"/>

Customer Perspective

Measure Name:

3-5 Year Target	Annual Target	Quarterly Target
<input type="text"/>	<input type="text"/>	<input type="text"/>

Product, Service, or Process Perspective

Measure Name:

3-5 Year Target	Annual Target	Quarterly Target
<input type="text"/>	<input type="text"/>	<input type="text"/>

Driver Measures
"What do we need to do well?"

People & Culture

Measure Name:

3-5 Year Target	Annual Target	Quarterly Target
<input type="text"/>	<input type="text"/>	<input type="text"/>





Measures: Formula, Data Source & Owner, Frequency

Document each measure and target. Review SMART questions. Is there a calculation required to report the measure? Who is the person or department to report on the measure and performance? How frequently should this measure be reported?

EXAMPLE:

Objective Name: Enhance/Restore Impacted Wetlands

Measure Name: Wetland Flow Restored

Description: Average MGD delivered to jurisdictional wetlands

Formula: Total Flow (volume/time) / time

3-5 Year Target: 3,000,000 GPD

Annual Target: 600,000 GPD

Quarterly Target: 150,000 GPD

Data Source/Owner: SQL Server/Lewis and Clark

Frequency: Quarterly

Objective Name: _____

Measure Name: _____

Description: _____

Formula: _____

3-5 Year Target: _____

Annual Target: _____

Quarterly Target: _____

Data Source/Owner: _____

Frequency: _____

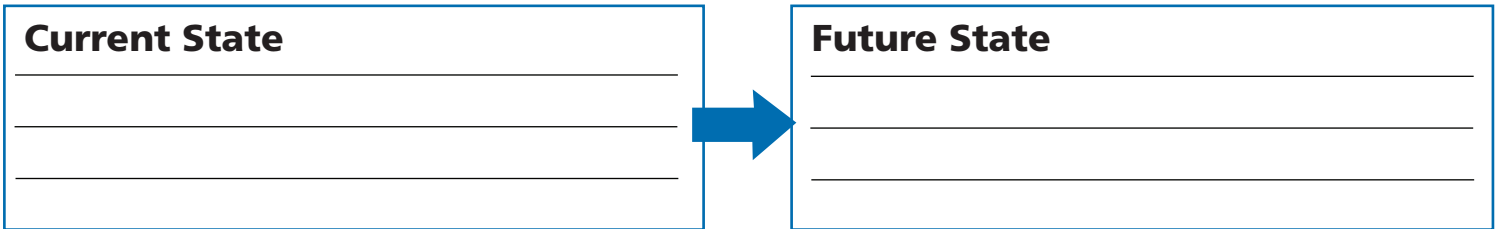




Initiatives

Initiatives tell us how we will accomplish our objectives. At this point in the process, you may find that your objective statements easily translate into initiatives – or that your objective statements need to be modified based on what you’ve learned while developing the roadmap.

Strategic Perspective: _____



What are we going to do?

Objective: _____

Are we on track?

Measure: _____

How will we accomplish the objective?

Initiative: _____

Initiative Checklist

- Aligned with the Purpose Statement
- Ability to track progress
- Current and future state defined
- Set Targets
- Know what we are going to do
- Not business as usual
- Mapped the strategic perspective
- Answer the question, “how will we accomplish the objective?”





Action Plan

Action plans include accountability, action items, clearly defined start and stop dates, a budget, and dedicated staff and resources to accomplish the initiatives.

Objective: _____

Initiative: _____

Action Plan Checklist:

Accountability at the leadership level

A Budget

Clearly defined start & end dates

Action Items

Dedicated staff & resources

Who is Accountable: _____

Action Item: _____

Start Date: _____ End Date: _____

Budget: _____

Staff & Resources: _____

Action Item: _____

Start Date: _____ End Date: _____

Budget: _____

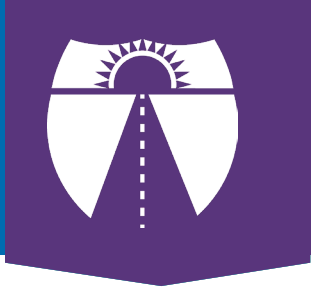
Staff & Resources: _____

Action Item: _____

Start Date: _____ End Date: _____

Budget: _____

Staff & Resources: _____



Roadmap

Environment	Objective: _____	Accountability: _____	Measure: _____
	_____	_____	Measure Description: _____
	_____	Current State: _____	_____
	_____	Future State: _____	3-5 Year Target: _____
	_____	_____	Annual Target: _____
_____	_____	Quarterly Target: _____	

Financial	Objective: _____	Accountability: _____	Measure: _____
	_____	_____	Measure Description: _____
	_____	Current State: _____	_____
	_____	Future State: _____	3-5 Year Target: _____
	_____	_____	Annual Target: _____
_____	_____	Quarterly Target: _____	

Customer	Objective: _____	Accountability: _____	Measure: _____
	_____	_____	Measure Description: _____
	_____	Current State: _____	_____
	_____	Future State: _____	3-5 Year Target: _____
	_____	_____	Annual Target: _____
_____	_____	Quarterly Target: _____	

Process	Objective: _____	Accountability: _____	Measure: _____
	_____	_____	Measure Description: _____
	_____	Current State: _____	_____
	_____	Future State: _____	3-5 Year Target: _____
	_____	_____	Annual Target: _____
_____	_____	Quarterly Target: _____	

People & Culture	Objective: _____	Accountability: _____	Measure: _____
	_____	_____	Measure Description: _____
	_____	Current State: _____	_____
	_____	Future State: _____	3-5 Year Target: _____
	_____	_____	Annual Target: _____
_____	_____	Quarterly Target: _____	

Formula:	Action Item:	Start/End:
Frequency:		Budget:
Data Source/Owner:		Owner:
Initiative:	Action Item:	Start/End:
		Budget:
		Owner:

Formula:	Action Item:	Start/End:
Frequency:		Budget:
Data Source/Owner:		Owner:
Initiative:	Action Item:	Start/End:
		Budget:
		Owner:

Formula:	Action Item:	Start/End:
Frequency:		Budget:
Data Source/Owner:		Owner:
Initiative:	Action Item:	Start/End:
		Budget:
		Owner:

Formula:	Action Item:	Start/End:
Frequency:		Budget:
Data Source/Owner:		Owner:
Initiative:	Action Item:	Start/End:
		Budget:
		Owner:

Formula:	Action Item:	Start/End:
Frequency:		Budget:
Data Source/Owner:		Owner:
Initiative:	Action Item:	Start/End:
		Budget:
		Owner:

