

2026-2029 District Three-Year Plan

The Three-Year Plan is a critical piece of the District’s Strategic Plan that prioritizes the major short- and near-term projects and/or programs that the District must focus on to support its vision and the Performance Areas and their indicators.

This document provides essential background information on each project selected for inclusion in the District’s 2026-2029 Three-Year Plan. This information demonstrates why each project was included in the Three-Year Plan, how it supports the overall Strategic Plan, and the required time, cost, and resources as available.

For those projects that are also in the District’s Capital Improvements Plan (CIP), additional information can be found in the project’s business cases.

A timeline is provided to illustrate the duration and overlap of these projects. Note that several projects (ERP & EAM, Liquid Processing Phase 2, Heat & Power and Biosolids Improvements) extend beyond December 2029 and will be shown in subsequent Three-Year Plans for an extended period.

Three-Year Plan Timelines, July 2026-December 2029

Project	July-Dec 2026	Jan-Jun 2027	Jul-Dec 2027	Jan-Jun 2028	Jul-Dec 2028	Jan-Jun 2029	Jul-Dec 2029
Enterprise Resource Planning (ERP) & Enterprise Asset Management (EAM)	█	█	█	█	█	█	█
Liquid Processing Improvements Phase 2	█	█	█	█	█	█	█
Heat & Power and Biosolids Improvements	█	█	█	█	█	█	█
Collection System Capacity Analysis		█	█	█	█	█	█
Sewer Use Ordinance (SUO) Revisions	█	█	█	█	█	█	
Strategic Plan Development & Reporting Process	█						
Executive Director Performance Evaluation Review Process	█						

Individual Three-Year Projects Work Plans

Click each project below to go directly to its work plan.

[Enterprise Resource Planning \(ERP\) & Enterprise Asset Management \(EAM\)](#)

[Liquid Processing Improvements Phase 2](#)

[Heat & Power and Biosolids Improvements](#)

[Collection System Capacity Analysis](#)

[Sewer Use Ordinance \(SUO\) Revisions](#)

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Enterprise Resource Planning (ERP) & Enterprise Asset Management (EAM) Systems Implementation

Why this project is important

This is a two-part project to implement a new Enterprise Resource Planning (ERP) system and a new Enterprise Asset Management (EAM) system. The ERP will provide financial and human resources functions. The EAM will support asset management, maintenance planning, and capital planning.

The primary benefits of the project are more effective and reliable management of District financial information and asset information. The project will also remove a significant risk of system failure posed by the obsolescence, lack of support, and unreliability of WAM 1.9, the system currently handling key financial and asset information.

Additional key facts

- The project is currently implementing Workday, the selected ERP system.
- Workday financials are scheduled to go live in October 2026. Human capital management (HCM) will go live in July 2027, with final software implementation stabilization completed in August 2027.
- The District is currently evaluating options to manage the EAM software portion of the project.
- The EAM will follow similar steps as the ERP; securing consulting help with the project, identifying requirements, selecting a system and an implementation firm, and implementing the system.
- The EAM timeline is to be determined.

Major benefits

The implementation of modern software applications improves the District’s overall operational efficiency.

There are many major benefits for both the ERP and EAM portions of this project, including:

- Removing a significant operational and financial risk factor by replacing the outdated and unsupported WAM 1.9 system that the District currently relies on for both financial and asset management functions.
- Creating a single, unified source of financial data to replace the several computer systems and many spreadsheets the District currently uses.

At a Glance	
Anticipated timeframe	July 2026-December 2029
Sponsors	<ul style="list-style-type: none"> • Workday (ERP): William D. Walker, Director of Business Administration • EAM: Alan Grooms, Director of Operations and Maintenance
Key milestones	<p>Workday (ERP)</p> <ul style="list-style-type: none"> • October 2026: Accounting & budgeting related modules deployed • February 2027: Financial planning module deployed • July 2027: <ul style="list-style-type: none"> ○ Human capital management (HCM) modules deployed and stabilized. ○ Remaining financial modules deployed (multi-year budgeting, specialized reporting tool). <p>EAM</p> <ul style="list-style-type: none"> • To be determined.

- Providing efficient and clear controls over purchase order issuance, budgetary amounts, budget changes, and other financial actions.
- Streamlining a range of financial processes, including banking, receipt of payments, payroll, and more.
- Improving financial reporting tools to be more current, more reliable, and more flexible.
- Creating a unified recruitment process from position creation through onboarding.
- Streamlining personnel goal-setting and evaluation processes.
- Unifying benefits management processes, including providing self-service tools for employees to review and adjust benefit elections.
- Providing a unified, consistent asset hierarchy for managing District physical assets.
- Maintaining current, complete asset information, including data about condition, data about preventative maintenance requirements, etc.
- Improving efficiency and thoroughness of order management and maintenance planning.
- Facilitating long-term repair and replacement planning.
- Improving a variety of asset-related reporting functions, including those related to maintenance practices, asset condition, and asset-related spending.

Aligned Performance Area(s)

- **Financial Capacity & Resilience:** The ERP will improve financial controls and multi-year financial planning for the District. The EAM will improve analysis, prioritization and planning for asset maintenance and replacement, including asset work in capital projects.
- **Infrastructure Reliability:** IT infrastructure will be improved by the adoption of modern enterprise systems and associated processes. A modern asset management system will improve asset-related infrastructure.
- **Public Trust:** These systems will support and build trust in the District's financial integrity through Workday's financial controls, data integrity, and audit trail. Further, the EAM will increase trust in District asset management by providing more thorough analysis and prioritization tools.

Dependencies

Workday implementation (ERP) is underway. The EAM portion of the project is dependent on several factors:

- Timely completion of Workday implementation.
- Developing a detailed project charter and plan.
- Securing project management resources for the project. (Workday project management resources are not suited due to the different nature of an EAM project and will be occupied with Workday post-go-live support and stabilization.)
- Aligning the EAM project with other projects that require IT resources.
- Aligning the EAM project with other projects that require resources from departments whose staff will be involved in the EAM (Operations Reliability, Maintenance, Treatment Plant and Engineering).

Deliverables

Workday (ERP)

The ERP portion will deploy Workday with the following functionality:

- Financial management (accounting, business assets, banking and settlement, vendor and customer accounts)
- Procurement
- Budgeting
- Multi-year financial planning (multi-year project budgeting, financial trends, planning for future workforce growth)
- Financial reporting
- Position management (reporting hierarchy, job duties, recruitment)
- Employee management (salary and benefits, training management, employee evaluation)

EAM

The specific functionality of the EAM is to be determined, but will include the following general functions:

- Asset hierarchy
 - Information about how various assets relate to one another; this facilitates analysis and planning of groups of assets, evaluation of linked risks, and analysis of risk mitigation.
- Individual asset information
 - Records of assets, data about condition, data about preventative maintenance requirements, etc.
- Work order management and maintenance planning
- Long-term repair and replacement planning
- Reporting
 - Asset conditions, risks, costs, etc.

Resource requirements as known today

The project is funded by the CIP project, “Maintenance, Financial and HR Systems.” The 2026 budget included a total project cost authorization of \$8.95 million. This amount will be reviewed and revised in the 2027 budget. The Workday portion of the budget is currently about \$4.2 million, which covers contract project management, the implementation firm, and Workday licensing costs during implementation. Ongoing licensing and support costs will be added to the operating budget.

Significant resources are needed for the Workday project, including:

- Roughly 20% to 80% of the time for most staff in the Department of Business Administration.
- An implementation firm to run the implementation process, including training, system design, architecture and configuration, unit and end-to-end testing, deployment, and stabilization.
- An external support firm that originally led requirements gathering, system selection, and scope of work negotiations and that is currently providing project management and system testing support.
- Staff augmentation resources, which frees key subject matter experts on staff to focus on the ERP project.
- IT project resources to assist with business analysis and testing.

The EAM portion will require similar resources. The EAM portion will need to identify internal resources for project management, IT support, and subject-matter experts. It will need external resources for

additional project management, requirements gathering, vendor selection, implementor selection, scope of work and contract negotiation, and likely staff augmentation to allow subject-matter experts to focus on the project.

Note that the EAM portion will require different resources than the Workday implementation. EAM project management, subject-matter expertise, and system implementation differ from those for an ERP system.

Risks to the project

- **Workday (ERP):** The primary risks to the ERP project are those that cause delays, given that the project is operating under a contracted schedule. Examples include data conversion issues, unexpected staff absences, vendor availability issues, failures in other District systems that divert IT resources, and scope expansion. The project sponsor and project managers have set timeline integrity as the top priority to avoid project failure.
- **EAM:** The primary risks at this point in the project relate to project resources, as described above. Resource constraints frequently cause enterprise project failures. The Workday project has already secured the most needed resources.

Urgency

The Workday (ERP) project is underway. Delay would result in project failure, as resources for the District, Workday, and the implementation firm (Strada) have been committed and contracted.

Two factors drive the urgency for the EAM project. First is the risk of failure of WAM 1.9, the District's current maintenance management system. The second is the value of implementing improved maintenance management, asset management, and capital planning processes as allowed by a modern EAM. However, the EAM project faces challenges in resource availability. The EAM timeline is still to be determined.

External stakeholders

- **ERP (Workday):** Vendors who work with the District, District financial institutions, and District employees as users of the system for benefits management.
- **EAM:** To be determined.

Liquid Processing Improvements (LPI) Phase 2

Why this project is important

Critical equipment used in the liquid treatment process and supporting the biological processes at the treatment plant is outdated and vulnerable to failure. This project is necessary for the continued reliable operation of the plant, ensuring we can meet the needs of growing area communities and businesses and maintain permit compliance.

Additional key facts

- The region is growing, and additional capacity must be built in advance.
- This project addresses declining annual Wisconsin DNR Compliance Maintenance Annual Report (CMAR) scores.
- The project will provide capacity and operational flexibility while also bringing energy efficiency benefits.
- As of March 2026, this project is in the final stage of design, with project construction bidding in June 2026.

At a Glance

Anticipated timeframe	July 2026-December 2030
Sponsor	Jen Hurlebaus, Director of Planning and Engineering
Key milestones	<ul style="list-style-type: none">• June 2026: Complete design and advertise for bids• Mid-July 2026: Receive bids• August 2026: Award project• September 2026: Start construction phase of project• December 2030: Project completed

Major benefits

The project will implement wastewater treatment process improvements to meet projected 2050 loading, reduce energy consumption, and utilize innovative new technologies that support future plant expansion.

Aligned Performance Area(s)

- **Infrastructure Reliability:** This project provides the District with operational flexibility and reduces energy consumption, which supports the reliability of our infrastructure.
- **Regulatory Compliance:** The District's purpose is to provide strategic wastewater management for the region that complies with our WPDES permit. This project will address the need to update our plant infrastructure to meet 2050 loading projections and invest in process improvements to address potential future effluent nitrogen limits.

Dependencies

None

Deliverables

This project replaces aging assets associated with the activated sludge process at the treatment plant to ensure continued permit compliance amid increased wastewater loadings. (Loadings are best explained as the relative strength of wastewater due to the concentration of pollutants in it.) The project also

replaces related assets that can be more easily replaced during the project's extensive construction sequencing.

Equipment to be replaced includes all blowers and associated switchgear; WAS and RAS pumps, diffusers, mixing systems, control systems, electrical systems, sensors and probes; gates, cross collectors and longitudinal drives within the primary tanks; related HVAC systems and other assets related to the secondary treatment process. Replacing the major aeration equipment provides the District with the opportunity to implement a low-dissolved-oxygen activated sludge process and higher-efficiency equipment to decrease energy usage at the plant.

Resource requirements as known today

The total project cost authorized in the 2026 budget for Liquid Processing Improvements-Phase 2 is \$92 million. This project is anticipated to be funded with a Clean Water Fund Loan through the Wisconsin Department of Natural Resources.

Construction is expected to begin in late 2026 and be completed in 2030.

The project will require staff from multiple departments. Engineering staff will provide project management for scoping, design, and construction activities. Operations engineering staff will provide technical input, review design specifications and plans, and help coordinate construction activities as complex construction sequencing will be required to maintain facility operations. Additional staff from all divisions will be required throughout the project. Contracted engineering services will also be required for construction-related services not performed by District staff.

Risks to the project

The key risk and issue associated with this project is the failure of critical existing components before construction, which could jeopardize permit compliance and treatment. The 2016 Liquid Processing Facilities Plan indicated a project window ranging from 2020 to 2025 for most of the assets outlined. Designing and replacing these major assets is complex and takes multiple years to complete. Delays in detailed design and/or construction will increase the risk and likelihood that the District will experience a major asset failure, potentially resulting in a prolonged permit violation.

Other potential risks to the project include contractor performance, bid pricing uncertainties, compliance with the Build America, Buy America (BABA) Act, procurement delays, and unforeseen circumstances that could lead to increased costs and schedule extensions. The project sponsor and project manager will actively work to mitigate risks throughout the project to the best of their ability.

Urgency

This project will go out to bid in June 2026.

External stakeholders

This project supports District customer communities by providing treatment capacity to support future growth and economic development.

Heat & Power and Biosolids Improvements

Why this project is important & key facts

The District’s energy-producing biogas and thermal systems are outdated and require increased maintenance. The District completed a facilities plan to evaluate this infrastructure and provide alternatives for the use of District biogas for the next 20 years, given the need for equipment replacement. The preferred option is to create and sell pipeline-ready biogas and update the thermal systems.

The District’s biosolids program faces numerous regulatory, economic, environmental and social challenges. The District is finalizing a facilities plan in 2026 to evaluate and develop viable alternatives for treating and handling District biosolids for the next 20 to 25 years.

Additional key facts

- The District’s treatment plant produces approximately 50,000 dry pounds of Class B biosolids per day and recovers approximately 295 million cubic feet of biogas per year.
- Most biosolids are applied to area agricultural lands as a liquid fertilizer, called Metrogro (Class B liquid). Storage capacity, availability of farmland, hauling distance, and emerging contaminants are challenges the biosolids program needs to address.
- Biogas and heat from District processes currently help power assets, which offsets purchasing energy from the grid. This project seeks to improve energy generation.
- There may be reduced capital costs by combining the Heat and Power Improvements and Biosolids Infrastructure projects. Options are being evaluated to provide recommendations for inclusion in the 2027 Capital Improvements Plan.

At a Glance

Anticipated timeframe	January 2026-Some time in 2032
Sponsor	Jen Hurlebaus, Director of Planning and Engineering
Key milestones	<ul style="list-style-type: none"> • August-November 2026: Develop request for proposals for design services • 2027-2029: Design phase of project • 2029: Finalize design, bid project and begin construction • 2030-2032: Construction

Major Benefits

This project will address the District’s regulatory biosolids storage capacity threshold. The project also aims to maximize the usage of treatment process-produced energy and operational efficiency.

Specifically,

- Moving to a Class A Liquid path elevates the Metrogro product to a higher pathogen standard and requires less volume to be delivered to agricultural fields while maintaining the benefits of liquid application.
- The Class A Liquid approach affords significant opportunities to merge the District's biosolids improvements with the ongoing Heat & Power project, creating a more integrated and energy-efficient treatment process.
- With an energy production pathway of pipeline injection, the District can maximize financial return and increase operational efficiency without cogeneration equipment.

Aligned Performance Area(s)

- **Infrastructure Reliability:** The District improves its operational reliability by replacing end-of-life equipment and replacing outdated processes with more efficient ones.
- **Regulatory Compliance:** The District is required to responsibly manage its biosolids as required by and in accordance with state and federal laws.

Dependencies

The facilities plan deliverables outlined below require approval by the Wisconsin Department of Natural Resources (WDNR).

Deliverables

Aside from the built infrastructure itself, deliverables for this project are facilities plans (one each for heat & power improvements and biosolids improvements) and project plans and specifications. The basic purpose of facility planning is to assess the condition, establish the need for improvement, evaluate options to address system needs, and identify the cost-effective alternative. Facilities plans do not authorize specific projects or spending, but are necessary to design the complete plans and specifications needed to execute the infrastructure project. They are also needed for any projects that may utilize Clean Water Fund loans.

- **Heat and Power Improvements Facilities Plan:** This plan, completed in 2025, recommended upgrading the biogas system to produce renewable natural gas (RNG) for pipeline injection and a decentralized heating system. The next phase of the project is to develop complete plans and specifications for the infrastructure improvements required to upgrade the biogas system.
- **Biosolids Facilities Plan:** This plan is estimated to be complete in the third quarter of 2026. The draft Biosolids Facilities Plan recommends changing from a Class B liquid to a Class A liquid program. The next phase of work for the project is to approve the facility plan and then design to complete plans and specifications for the infrastructure improvements needed to produce Class A biosolids.
- **Project Plans and Specifications:** Once the facilities plans are complete and approved by WDNR, project development will proceed to the design phase. This work is expected to start in early 2027 and extend through 2029, resulting in a set of plans and specifications for contractor bidding and the follow-on construction phase to deliver the built infrastructure.

Resource requirements as known today

The project will require staff from multiple departments. Planning and Engineering staff will provide project management for scoping, design, and construction activities. Operations engineering staff will provide technical input for project scoping, review design specifications and plans, and help coordinate construction activities while maintaining facility operations. Additional staff from all divisions will be required throughout the project.

Risks to the project

- **Biosolids**
 - o Introduction of a new process to produce Class A biosolids.
 - o Farmer acceptance of the product change.

- o Completing the project without defined regulatory requirements for PFAS. The facility plan evaluated the feasibility of adding advanced treatment processes to mitigate this risk.
- **Heat & Power**
 - o The District is unfamiliar with operating an RNG facility for pipeline-quality natural gas.
 - o The project will require outside partnerships for pipeline injection.
 - o Financial feasibility is based on EPA’s Renewable Fuel Standard (RFS) program. However, this program is not guaranteed, and RIN (renewable identification number) values have historically fluctuated significantly. The voluntary market can provide additional security with long-term contracts.

Urgency

The District faces key challenges with its Metrogro biosolids program, including storage capacity, the availability of farmland, longer hauling distances to available farmland, and the presence of emerging contaminants. Not doing this project or delaying it may affect the District’s ability to meet the biosolids storage requirements set forth in Wisconsin Administrative Code (NR204).

The District seeks to recover as many resources as possible from the wastewater treatment process. However, the District’s biogas recovery system is beyond its life expectancy, with frequent mechanical and electrical issues. In addition, the District is currently producing more biogas than it can use at times during the year and is wasting (flaring) the excess.

Merging the Biosolids and Heat & Power infrastructure improvements now prevents siloed projects and reduces the risk of redundant construction or incompatible systems in the future.

External stakeholders

This project will require external partnerships for pipeline injection; Madison Gas and Electric is a potential partner for the Heat & Power project.

Farmers and landowners participating in the District’s Metrogro (biosolids) program are significant external stakeholders affected by the project.

Collection System Capacity Evaluation

Why this project is important

The District’s Collection System Capacity Evaluation is an important planning document that assesses and forecasts population, land use, and wastewater flow trends across the District’s service area. The Capital Area Regional Planning Commission (CARPC) uses the latest U.S. Census data, municipal population projections, and community development plans to inform flow forecasts for the next 20 years. These flow forecasts are used to determine existing and future capacity requirements throughout the collection system, which, in turn, are reflected in periodic updates to the District’s Collection System Facilities Plan and in annual Capital Improvement Plans (CIPs).

Additional key facts

- The previous Collection System Capacity Evaluation was completed in 2018, using 2010 Census data. The 2020 Census data was released in 2025.
- Dane County is one of the fastest-growing counties in Wisconsin. According to the Wisconsin Department of Administration, the county’s population, including much of the District’s service area, is expected to increase by 12% between 2020 and 2030.
- Many of the District’s customer communities are experiencing higher rates of high-density infill development since the last capacity evaluation was performed. This increase in infill development will require careful consideration and analysis in the upcoming capacity evaluation.

Major benefits

The evaluation is used to determine existing and future capacity requirements throughout the collection system for sewer piping and pump stations. It also supports the review of sewer extensions, annexations, and capital planning for the District and its customer communities.

Aligned Performance Areas

- **Infrastructure Reliability:** The capacity evaluation is used to update the District’s Collection System Facilities Plan and inform the projects selected for inclusion in the annual Capital Improvements planning process.
- **Public Trust:** This project supports trust in the District’s ability to serve our growing communities.

Dependencies

- Completion of the Collection System Facilities Plan update (version 2024).
- 2020 Census data and population projections through 2050 from CARPC.

At a Glance

Anticipated timeframe	January 2027-July 2029
Sponsor	Jen Hurlebaus, Director of Planning and Engineering
Key milestones	<ul style="list-style-type: none"> • June 2026: Propose project in 2027 Capital Improvements Plan • October 2026: Project approval in 2027 Operating Budget and Capital Improvements Plan • January 2027: Project planning phase begins • July 2029: Finalize evaluation report

Deliverable(s)

- **Collection System Evaluation Report:** This report will include population and flow projections throughout the service area for the 20-year planning horizon of the study. It will also identify existing and future capacity needs for collection system assets for subsequent inclusion in the Collection System Facilities Plan and annual CIPs.

Resource requirements as known today

District staff resource requirements are unknown at this time, as an evaluation of the CARPC data is required before resource allocation can be determined. Engineering consulting services will be required to complete the collection system hydraulic model update using 2020 Census data, calibration, and future projections.

Risks to the project

There is a risk that the project may not start or be completed on schedule due to limited staff resources. Additionally, timely data sharing with CARPC poses a potential risk. The District's flow forecasts are built on the 2020 Census data and future population projections developed and provided by CARPC. If CARPC cannot provide its projections on the District's schedule, the capacity evaluation project may also be delayed.

Urgency

This evaluation is conducted every 10 years, before updates to the Collection System Facilities Plan. To stay on schedule, we should begin this analysis in 2027 and complete it in 2029.

This updated data and analysis help ensure we can continue providing services to our communities for the next 20 years. It also supports the review of sewer extensions, annexations, and capital planning for the District and its customer communities.

External stakeholders

- Capital Area Regional Planning Commission
- District customer communities

Sewer Use Ordinance (SUO) Revisions

Why this project is important

A sewer use ordinance (SUO) is a set of local rules that legally regulate the use of a public sewer system. It allows the District to exercise its authority over our sewerage system facilities and is intended to protect public health, environmental quality, and our wastewater treatment and conveyance facilities. The District’s SUO is adopted pursuant to and in implementation of Wis. Stat. §§ 200.11(1)(d) and 200.13(3), and must be updated regularly.

A SUO covers numerous topics, but in short, it:

- Specifies the types of wastes that cannot be discharged into the sewerage system;
- Imposes requirements on industrial wastewater dischargers;
- Provides a mechanism for issuing permits and allowing connections to our system; and
- Enables the District to comply with administrative provisions, water quality requirements, pretreatment effluent standards, and other discharge criteria that are required or authorized by the State of Wisconsin or federal law.

Additional key facts

- In 2026, District staff and legal counsel completed the first comprehensive review and revision of the District’s Sewer Use Ordinance in over 10 years.
- In that work, staff and Legal Counsel identified significant topics to address in the next SUO updates, including fats, oils and greases (FOGs); additional chloride reporting; and inflow & infiltration (I&I).
- Staff and Legal Counsel further identified supplemental and required supporting documents that are needed as part of the SUO.
- The District plans to review and make revisions to the SUO as necessary every three years.

Major benefits

The SUO enables public health and environmental protection, financial stability and fairness, operational efficiency, and compliance with state and federal laws, such as the Clean Water Act.

At a Glance	
Anticipated timeframe	July 2026-June 2029
Sponsor	Alan Grooms, Director of Operations and Maintenance
Key milestones	<ul style="list-style-type: none"> • June 11, 2026: Commission adopts 2026 SUO revisions • July 2026–December 2027: Local Limits Study • January 2027-July 2028: Complete Pretreatment Manual and Pretreatment Emergency Response Plan updates • January-December 2027: Policy work on key topics (enforcement stance, PFAS, FOGs, I&I, chloride) • January-December 2028: Update SUO language; activate stakeholder outreach • January-June 2029: Finalize and adopt next SUO revisions

Aligned Performance Areas

- **Infrastructure Reliability:** The SUO allows the District to specify the types of wastes that cannot be discharged into the sewerage system, impose requirements on dischargers, and provide a mechanism for issuing permits and allowing connections to our system.
- **Regulatory Compliance:** The provisions of the SUO are intended to enable the District to comply with administrative provisions, water quality requirements, pretreatment effluent standards, and other discharge criteria required or authorized by the State of Wisconsin or federal law.

Dependencies

The successful advancement of identified future revision needs is dependent on several factors, including:

- Executive-level policy discussions, communications, and decisions in areas associated with these topics:
 - PFAS
 - Fats, oils & grease (FOG) regulation
 - Inflow & infiltration (I&I) initiatives
 - Chloride reduction
 - Expansion of monitoring and reporting expectations
- Workload considerations of required Subject Matter Experts (SMEs)
- Communications responsibilities related to future changes and stakeholder engagement
- HR duties relating to updating job descriptions
- Legal and enforcement strategy

Deliverables

Several ancillary projects require timely work. These projects are linked to the SUO and include:

- **Local Limits Study:** A local limits study is essential for setting site-specific, technically based discharge restrictions on industrial users to prevent pass-through, interference, and sludge contamination at a wastewater plant. These limits protect infrastructure, ensure compliance with WPDES permits, and provide the legal, scientific basis for regulations within an SUO.
- **Review and update the Pretreatment Manual:** The Pretreatment Program Manual defines the overall structure, including legal authority, local limits, permitting procedures, and inspection protocols.
- **Update the Pretreatment Emergency Response Plan:** The Pretreatment Enforcement Response Plan details the specific, escalating steps taken when an industry violates its permit or local regulations, ensuring consistent, timely, and appropriate enforcement.

Additionally, staff will work through the three topics withheld from the 2026 Sewer Use Ordinance Update (FOGs, additional chloride reporting, and I&I) as the District must strengthen requirements in these areas to meet regulatory requirements and protect infrastructure.

Staff will need to determine resource and programmatic needs to support these areas. Additionally, any new requirements or restrictions on impacted audiences will require a robust communication and engagement plan to solicit feedback and gain support. These sections of the SUO will also need to be updated accordingly.

Resource requirements as known today

Full resource requirements are unknown at this time. Initial thoughts and assessments on this, as of May 2026, are as follows:

- **Legal:** District Legal Counsel will be needed at regular points throughout the process, with added assistance at certain peak times.
- **Communications:** Expect demands on time to assist with outreach efforts as well as for general messaging.
- **Local Limits Study:** It is anticipated that the District will retain a consultant for this project. The full scope and cost have not been estimated as of this time. It is expected that the work crafting the RFP and study will commence shortly after adoption of the 2026 version of the SUO, with the Local Limit Study being completed in 2027.
- **Subject matter experts (SMEs):** SMEs inside the organization will need to be engaged and provide work and review throughout. These specific SMEs have not been fully identified, but are expected to draw heavily from Ecosystem Services, Collection System, Treatment Plant, Planning, and Engineering departments.

Risks to the project

The major risk to this effort is in the willingness and ability to impose requirements on customer communities, individual dischargers and other stakeholders. To be effective in the areas being evaluated for the next update, requirements will need to be fully defined, and legal authority (including penalties for non-compliance) will need to be defined, articulated, and acknowledged. Failure to provide “teeth” to the SUO and a lack of staff commitment to enforce SUO requirements and violations will make the effort less effective and possibly result in the failure of the next steps.

Urgency

The SUO is the District’s enforcement tool and must be maintained to meet both the needs of the District and to reflect statutory and regulatory requirements. Delaying updates or implementation of requirements increases the District’s liability to maintain its permit and protect its critical infrastructure from existing and near-horizon threats.

External stakeholders

As required by state statute, the District must inform impacted stakeholders of changes made to its Sewer Use Ordinance. Based on anticipated revisions in the next SUO update (2029), those stakeholders include customer communities, pretreatment customers, restaurants and commercial kitchens/food businesses.

Strategic Plan Development & Reporting Process

Why this project is important & key facts

A Strategic Plan connects the Commission’s vision and policy directions to specific, measurable objectives.

The District’s Commission is charged with making policy decisions to support “results, accountabilities and processes to [help the District] achieve its statutory requirements, not the specific means” (Commission Policy Book, page 4). To support those policy decisions, District staff must provide the Commission with timely, relevant reporting.

Additional key facts

- The Strategic Plan will be actionable with key performance indicators (KPIs) and the District’s most critical projects detailed within the Three-Year Plan.
- A transparent reporting process for District performance is necessary for public trust.

Major benefits

The Strategic Plan connects the Commission’s vision and policy direction to specific, measurable objectives for District staff. It will increase operational efficiency and enhance performance.

Aligned Performance Areas

All performance areas are created and monitored as part of the Strategic Plan.

Dependencies

- Strategic Plan acceptance by the Commission will support the development of staff performance goals.
- The Strategic Plan will be used to prioritize work for the 2027 budget development.

Deliverables

The deliverables of this project are the Strategic Plan, a Commission reporting schedule, and the Three-Year Plan. The Three-Year Plan will be updated annually.

Resource requirements as known today

Executive Director and District leadership management of the Strategic Plan

At a Glance	
Anticipated timeframe	July-December 2026
Sponsors	Commission and District Executive Management Team
Key milestones	<ul style="list-style-type: none"> • April 2026: Acceptance of Strategic Plan, including Performance Area KPIs • May 2026: Introduce and accept Commission Reporting Schedule and Three-Year Plan • May/June 2026: District leadership use the Strategic Plan to develop staff performance goals • December 2026: Begin annual review and update of the Three-Year Plan

Risks to the project

- Operating without an actionable strategic plan risks proper resource allocation (time and expense).
- Development of the Executive Director Performance Review Evaluation Process and alignment of District strategic priorities.

Urgency

The Strategic Plan is required to align District performance and resources. A completed plan allows resources to be aligned with the District's priority work.

External stakeholders

None

Executive Director Performance Review Evaluation Process

Why this project is important

The District needs to establish a clear, leadership-focused performance evaluation process that fosters meaningful feedback, aligns with organizational values, and supports ongoing development. It also aims to create a process that limits the imposition of additional burdens on the Commission and staff.

Additional key facts

- The District’s current District Executive Director Annual Performance Evaluation Process (ATT-4) requires an update.
- The District Commission and staff have identified key improvements required within the evaluation process. Key improvements sought are:
 - Timely evaluations
 - Aligned feedback from the Commission, direct reports, and the Employee Leadership Council (ELC)
 - Frequency of performance evaluation updates
 - Connection of District performance and personal performance of the Executive Director.

Major benefits

The review process will provide the Commission with a transparent tool to evaluate the Executive Director’s performance. The process will be repeatable with a focus on the Executive Director’s performance related to District performance and personal performance leading the organization. The Strategic Plan, including all performance areas, is planned to be part of the evaluation criteria.

Aligned Performance Area(s)

Public Trust: Having a repeatable, well-designed review process for the Executive Director builds trust in District leadership for customer communities, partners, the Commission and staff.

Dependencies

- Delivery of consulting services final evaluation process deliverables
- District Strategic Plan implementation
- Executive Director's annual goals

At a Glance	
Anticipated timeframe	July-December 2026
Sponsors	Commission and Executive Director Performance Review Subcommittee
Key milestones	<ul style="list-style-type: none"> • November 2025: First meeting of subcommittee and contractor (MGT) • March 2026: MGT presented to the Subcommittee a draft performance evaluation tool and process, including a user’s manual, for feedback and final direction • May/June 2026: Commission presented with draft review process and materials for feedback • June 2026: Commission approval of review process and materials • July 2026 (estimated): First new Executive Director performance review

Deliverables

- Executive Director Performance Review Guidebook
- Three separate surveys for the Commission, Executive Director direct reports, and Employee Leadership Council (ELC) as part of the evaluation process of the Executive Director.

Resource requirements as known today

- Contracted services (MGT) cost: \$34,716
- Commission Subcommittee: Per diem for meetings
- Required staff resources: HR (Organizational Development Specialist) & Executive Director

Risks to the project

One potential risk is a delay in the Executive Director's mid-year 2026 performance evaluation due to difficulty aligning the subcommittee members' and the consultant's schedules to meet and discuss draft materials. As a Commission-led project, this delay can be mitigated with HR processes and Executive Director progress updates.

Another risk is the development of unusable materials for the evaluation process. This risk is being mitigated by HR and the Executive Director's involvement.

Urgency

This project is necessary and urgent to provide the Commission with adequate oversight of the Executive Director and District performance. If the development of the review process is delayed, the Commission may experience a disconnect between its employee (Executive Director) and the District's performance and miss the opportunity to make governance course corrections as needed.

External stakeholders

None