



Plan
for the Future

Integrity Professionalism

Trust
Loyalty
Respect
Responsibility

2022 Strategic Plan



This Strategic Plan is the core document that will guide the District's efforts to positively adapt to change, and further clarify the future from the perspective of Board and management. The plan establishes a vision and direction for the District, with goals and objectives over the next five to seven years. It identifies areas of critical concern that must be addressed for the District to remain successful and provides management and staff with common goals to achieve our mission.



Mission Statement

The water and wastewater specialists – providing reliable and sustainable services.

Vision of the Future

To be a best-in-class utility of the “One Water” resource.

Organizational Values

Integrity

Honest and ethical policies, communication, and actions without bias.

Loyalty

Dedicated to the Public, the District, and its employees.

Respect

Appreciate differences in background, opinion, and approach, and acknowledge with high regard.

Responsibility

Demonstrate prudent use of all public and environmental resources.

Trust

Our actions and words inspire fairness and support.

Professionalism

Conduct interactions in a courteous and respectful manner and be responsible for personal actions and decisions.

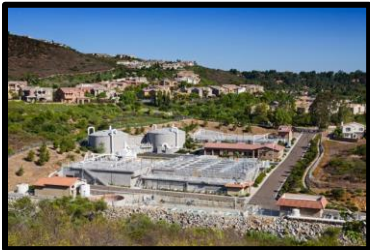
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STRATEGIC FOCUS AREA 1 – INFRASTRUCTURE INTEGRITY

Focus: Ensure reliable facilities and infrastructure.



Strategy 1.1 – Operations and Maintenance

The life of District assets can be extended by performing preventative and predictive maintenance, repairing, and replacing equipment as needed, to ensure that our customers continue to receive a high level of service that includes a safe and reliable water supply, dependable sewer collection services, and cutting-edge wastewater treatment that meets or exceeds all regulatory requirements.

Strategy 1.2 – Asset Management and Replacement

Infrastructure includes the traditional utility assets (pipelines, pump stations, treatment plants, etc.) as well as supporting facilities, such as District buildings and Information Technology systems. Leveraging the historical maintenance and performance history of our facilities with mapping, condition assessment, and analytical tools will allow the District to manage its infrastructure more efficiently. The development and prioritization of an asset replacement schedule is crucial to minimize the financial burden of prematurely replacing infrastructure that still possess useful life and reduce the frequency of unplanned and costly breaks and repairs.

Strategy 1.3 – Facility Planning

The Water, Wastewater and Recycled Water Master Plan is the fundamental growth-related planning document of the District, which identifies current and future Capital Facility needs and the required funding to meet those needs. The Master Plan will be updated based on need due to land use changes and/or regulatory requirements and will include projections on water, wastewater, recycled water demands, facilities required to meet those demands, as well as long term buildout capital facilities and demands.

STRATEGIC FOCUS AREA 2 – ORGANIZATIONAL IMPROVEMENT/EFFICIENCY

Focus: Increase organizational effectiveness and customer service excellence.



Strategy 2.1 – Technology

Technology is critical to our ability to keep our systems secure and prepare for disasters. Staying current with technology is a never-ending challenge that must be balanced by our needs and wants through a cost benefit analysis. Using reliable, tested products with ongoing support helps to ensure the systems will continue to meet our needs in the future.

Strategy 2.2 – Continuous Improvement

Efficiency and improvement require evaluation, willingness to review and consider change and the ability to manage our work processes more effectively. By reviewing our processes on a regular basis to determine what works well or needs to change, we can revisit the capabilities of technology to get the most benefit and increase efficiency. Rather than “reinvent the wheel,” collaboration with other agencies can result in organizational improvements in a cost effective and more efficient manner. We will also refer to industry standards and best practices established by professional associations.

Strategy 2.3 – Performance Measurement

To measure our overall performance, data is processed and interpreted to provide meaningful information, or metrics. Metrics focus on key areas, track performance, and identify trends. When possible, metrics compare to industry standards and best practices using benchmarks. Regular reports are provided to management and the Board. Employee performance evaluations contain Specific, Measurable, Attainable, Relevant, and Time-based (S.M.A.R.T.) goals.

STRATEGIC FOCUS AREA 3 - WORKFORCE EXCELLENCE

Focus: Attract and retain a well-trained, diverse, and inclusive workforce.



Strategy 3.1 – Employee Engagement

Employee engagement is the emotional commitment an employee has to an organization and is closely linked to employee satisfaction, morale, and retention. Employees are more engaged when there is effective two-way communication with management, teamwork, and personal responsibility. Communication is vital in keeping employees informed and maintaining morale. Culture is instrumental and people come first as we work together to achieve common goals in support of the mission.

Strategy 3.2 – Employee Recruitment and Retention

The District will need to find new ways to entice applicants and be the employer of choice in the water and wastewater industry. Partnerships with local schools and military bases may help with internships and the hiring of veterans. Internal career paths and opportunities for advancement are equally important for employee retention. Continuing to provide competitive salaries and enhance benefits including supporting a better work/life balance such as by offering flexible schedules and opportunities for telecommuting is critical for recruitment and retention of highly qualified employees. Staffing plans may be developed to forecast future needs of departments.

Strategy 3.3 – Employee Training and Development

Keeping staff trained and up to date is critical to maintain a skilled and efficient workforce. Employee development includes responsibility, realistic goals, timely feedback, growth opportunities, and recognition. Supervisors play a vital role in employee development and also need to receive ongoing training for soft skills and leadership. A variety of methods can be used in support of knowledge management to pass on knowledge of the District and utilize experience obtained in the water and wastewater treatment industry.

STRATEGIC FOCUS AREA 4 - FISCAL RESPONSIBILITY

Focus: Ensure fiscal health and fair utility rates.



Strategy 4.1 – Fiscal Management

Now, more than ever, it is critical to be aware of economic decisions and how they impact rate payers. The District must weather periods of expansion and growth as well as economic recession through prudent and financially sustainable practice and policy. An emphasis on fiscal responsibility must be promoted throughout the District. Fiscal management affects nearly every aspect of the District’s operations and helps to minimize future rate increases.

Strategy 4.2 – Operating and Capital Facility Reserve Funding

Reserve funds ensure continuing operations, fund unanticipated, unforeseeable, and planned repair or replacement of water and wastewater system facilities, equipment and infrastructure and avoid the cost of debt issuance and ongoing interest expense. Capital facility fees pay for capital improvements exclusively to accommodate future demands and support asset planning by ensuring “growth pays for growth.” Replacement funding must be developed in a fair and equitable manner to ensure appropriate funding sources and levels.

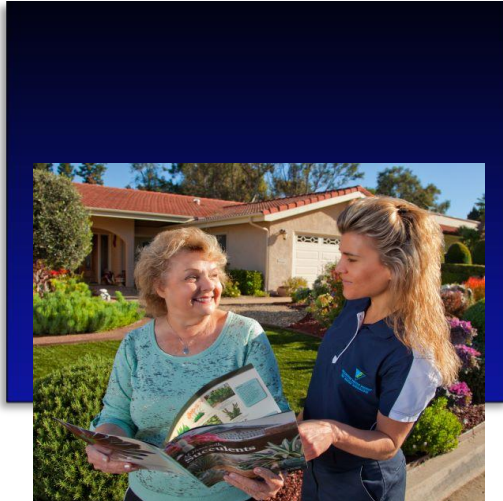
Strategy 4.3 – Customer Rates and Charges

Consider water and sewer rates that support the operation and maintenance of the District and adequately fund replacement and upgrades required to ensure reliable service and sustainability. Maintain reasonable, affordable rates and control costs through sound financial planning. Consider alternative revenue sources, grant funding, and other ways to enhance revenues and recover costs that would otherwise increase the revenue requirement for setting rates.

STRATEGIC FOCUS AREA 5 – PUBLIC INFORMATION AND OUTREACH

Focus: Actively
base to promote
District.

engage our customer
Vallecitos Water



Strategy 5.1 – Customer Outreach

To ensure contact with our customer base the District must use all possible ways of outreach including newsletters, tours, social media, local events, website, and the speaker's bureau. Outreach efforts increase awareness of the value we provide and an understanding of how we provide it.

Strategy 5.2 – School Outreach

Educating children on water, wastewater and our industry is critical because they are the future. To reinforce the need to conserve water, it is important to reach younger water users at an early age and create a life-long behavior. The greatest source of this audience is the school system and the creation of a cooperative program with the local school districts incorporating established standards adopted by the California State Board of Education.

Strategy 5.3 - Water Use Efficiency

Changing public opinion towards outdoor water use (which accounts for 50 to 80% of residential consumption) will save significant volumes of water. Reducing water use is mandated but is also the right thing to do as drought conditions continue and will have a detrimental effect on future generations.

Strategy 5.4 - Public/Private Partnerships

Partnerships between local governmental agencies and private sector organizations can provide a cost effective, business friendly and sustainable resource. When cost-effective and feasible, identify and evaluate mutually beneficial opportunities for collaboration with

private or public agencies. These partnerships may also help with filling jobs in water and wastewater industry.

STRATEGIC FOCUS AREA 6 – ENVIRONMENTAL STEWARDSHIP



Focus: Contribute to resource sustainability and environmental stewardship.



Strategy 6.1 – Water Resources

Water availability and climate change are some of the largest threats to the District and its rate payers. The District will need to evaluate water supply options taking into consideration reliability, quantity, quality and price. Restrictions and cost of traditional water supply sources as well as regulatory changes have made water reuse a viable alternative.

Strategy 6.2 – Water Supply Management

The Urban Water Management Plan includes consideration of local and statewide issues as well as programs and goals of the San Diego County Water Authority and any legislation adopted by the State. Drought, climate change and other water shortage issues highlight the need to manage water loss from a variety of sources in water distribution systems. The District can increase water supplies and recover revenue by identifying the scale and cost of these losses. The Water Loss Audit Reporting Program provides guidance to identify and eliminate water loss.

Strategy 6.3 – Renewable Resources

District operations have the potential to consume considerable quantities of non-renewable resources. Improving the operating efficiency of District assets and expanding the use of photovoltaic energy and battery storage systems will reduce the reliance on traditional resources. The use and lifecycle management of other materials, such as single use plastics, have damaging impacts on the environment. Exploring alternative materials and evaluating District purchasing policies can reduce the impacts of District operations.

Strategy 6.4 – Natural Environment Protection

District operations have the potential to impact the surrounding natural environment. Enhanced District operations will result in better protection of the natural environment. Coordination with surrounding land use agencies can promote better watershed management and result in new building standards that are more environmentally friendly.

Tactical Plan 2023

STRATEGIC FOCUS AREA NO. 1: INFRASTRUCTURE INTEGRITY		
SUPPORTING STRATEGY	TACTICAL PLAN INITIATIVE	DEPARTMENT
Operations and Maintenance	Enhance Fats, Oils, and Grease Program with field sampling to determine sewer strength	Operations and Maintenance
Operations and Maintenance	Complete wastewater collections odor control system upgrades	Operations and Maintenance
Operations and Maintenance	Meadowlark Failsafe replacement (Buena Reach)	Engineering/Capital Facilities
Operations and Maintenance	Sage Canyon Tank refurbishment	Engineering/Capital Facilities
Operations and Maintenance	Emergency Bypass Rehabilitation Project	Engineering/Capital Facilities
Operations and Maintenance	MRF Conversion to Sodium Hypochlorite	Operations and Maintenance/ Engineering
Operations and Maintenance	Tres Amigos Waterline Replacement Phase I	Engineering/Capital Facilities
Asset Management and Replacement	Assess all steel reservoirs and create rehabilitation schedule	Operations and Maintenance/ Engineering
Asset Management and Replacement	Inventory of single-check fire service backflows and develop replacement program	Operations and Maintenance
Asset Management and Replacement	Accelerate Valve Replacement Program	Operations and Maintenance/ Engineering
Asset Management and Replacement	Sewer lining and rehabilitation 2022 project	Engineering/Capital Facilities
Asset Management and Replacement	Asset Management Plan	Engineering/Asset Management
Asset Management and Replacement	Develop annual report on pump & motor efficiency analysis	Operations and Maintenance
Asset Management and Replacement	District-Wide water leak detection	Engineering/Asset Management
Facility Planning	Montiel Lift Station and Forcemain Replacement Project	Engineering/Capital Facilities
Facility Planning	Land Outfall Parallel Sewer Section	Engineering/Capital Facilities

Tactical Plan 2023

STRATEGIC FOCUS AREA NO. 2: ORGANIZATIONAL IMPROVEMENT/EFFICIENCY		
SUPPORTING STRATEGY	TACTICAL PLAN INITIATIVE	DEPARTMENT
Technology	Digital signature/E-Signature initiative for contracts and public forms	Information Technology
Technology	Public Record Request submission/tracking software	Information Technology
Technology	Electronic forms submission for the public	Information Technology
Technology	SCADA upgrade project - Phase II	Information Technology
Technology	Update and ensure compliance with Records Retention Policy	Administrative Assistant/Information Technology
Technology	DHS upgrades for critical infrastructure hardware	Information Technology
Continuous Improvement	Update Board Member Handbook	General Manager/Administrative Assistants
Continuous Improvement	Maximo plan check process finalization and reporting	Engineering/Development Services
Performance Measurement	Annual Change Order percentage less than 5%	Engineering/Capital Facilities

Tactical Plan 2023

STRATEGIC FOCUS AREA NO. 3: WORKFORCE EXCELLENCE		
SUPPORTING STRATEGY	TACTICAL PLAN INITIATIVE	DEPARTMENT
Employee Engagement	Provide opportunities for interactions with General Manager Re: Employee MOU negotiations	General Manager
Employee Engagement	Explore early retirement incentives	Administrative Services/Human Resources
Employee Recruitment and Retention	Complete annual Soft Skills training for all employees	Administrative Services/Human Resources
Employee Recruitment and Retention	Conduct "Stay Interviews" of key staff	Administrative Services/Human Resources
Employee Recruitment and Retention	Conduct negotiations with Employee Association for a successor MOU	Administrative Services/Human Resources
Employee Recruitment and Retention	Complete a compensation study	Administrative Services/Human Resources
Employee Recruitment and Retention	Revise policies and processes to assist with recruitment efforts	Administrative Services/Human Resources
Employee Recruitment and Retention	Hiring/Retention incentives	Administrative Services/Human Resources
Employee Recruitment and Retention	Improve diversity recruitment strategies	Administrative Services/Human Resources
Employee Recruitment and Retention	Leave Donation policy	Administrative Services/Human Resources
Employee Training and Development	Leadership assessments for new supervisors	Administrative Services/Human Resources
Employee Training and Development	Update the District's Succession Plan	Administrative Services/Human Resources
Employee Training and Development	Conduct "Smith System" Driver Training	Administrative Services/Risk & Safety
Employee Training and Development	Survey field crews to identify most likely source of injuries	Administrative Services/Risk & Safety

Tactical Plan 2023

STRATEGIC FOCUS AREA NO. 4: FISCAL RESPONSIBILITY		
SUPPORTING STRATEGY	TACTICAL PLAN INITIATIVE	DEPARTMENT
Fiscal Management	Evaluate water/sewer capacity issue	Engineering/Development Services
Fiscal Management	Update reclaimed water agreement	Finance
Fiscal Management	Develop solar benefit analysis review and tracking	Finance
Fiscal Management	Evaluate need and options for lines of credit	Finance
Fiscal Management	Evaluate outsourcing of payroll	Finance
Fiscal Management	Develop financial benchmarking for CIP	Finance
Fiscal Management	Prepare award winning Comprehensive Annual Financial Report	Finance
Fiscal Management	Expand NorthStar and Maximo integration to improve efficiencies	Finance
Fiscal Management	Evaluate Benefit of Meter Bench Test Facility	Finance
Fiscal Management	Prepare AMI Feasibility/ROI Study	Finance
Fiscal Management	Cross connection control program development	Finance
Operating and Capital Facility Reserve Funding	Develop PERS Funding Target Policy	Finance
Operating and Capital Facility Reserve Funding	Investigate development of Rate Stabilization Fund	Finance
Customer Rates and Charges	Modify bills to illustrate pass through rates	Finance
Customer Rates and Charges	Explore placing certain revenue requirements on property tax bill	Finance
Customer Rates and Charges	Monetization of other District land	General Manager

Tactical Plan 2023

STRATEGIC FOCUS AREA NO. 5: PUBLIC INFORMATION AND OUTREACH		
SUPPORTING STRATEGY	TACTICAL PLAN INITIATIVE	DEPARTMENT
Customer Outreach	Partner with EPA Watersense	Administrative Services/ Public Information
Customer Outreach	Develop "A Day in the Life of ..." videos for entry level job classifications	Administrative Services/ Public Information
Customer Outreach	Website redesign	Administrative Services/ Public Information
Customer Outreach	Develop new customer welcome packet	Administrative Services/ Public Information
Customer Outreach	Establish Bill Consolidation Best Practices	Finance/Public Information
Customer Outreach	Develop landscape conversion materials/program	Public Information
School Outreach	Refine/Expand Palomar College Intern Program	Administrative Services/ Public Information
Public/Private Partnerships	Explore bulk purchasing initiative, shared services	Operations and Maintenance/ Finance

Tactical Plan 2023

STRATEGIC FOCUS AREA NO. 6: ENVIRONMENTAL STEWARDSHIP		
SUPPORTING STRATEGY	TACTICAL PLAN INITIATIVE	DEPARTMENT
Renewable Resources	Analyze alternative fuel options for hand tools (blowers, etc.)	Operations and Maintenance
Water Resources	MRF Direct Potable Reuse Feasibility Evaluation	Engineering/ Development Services
Water Supply Management	Water loss validation	Engineering/ Development Services
Natural Environment Protection	Develop herbicide/pesticide best management practices	Operations and Maintenance