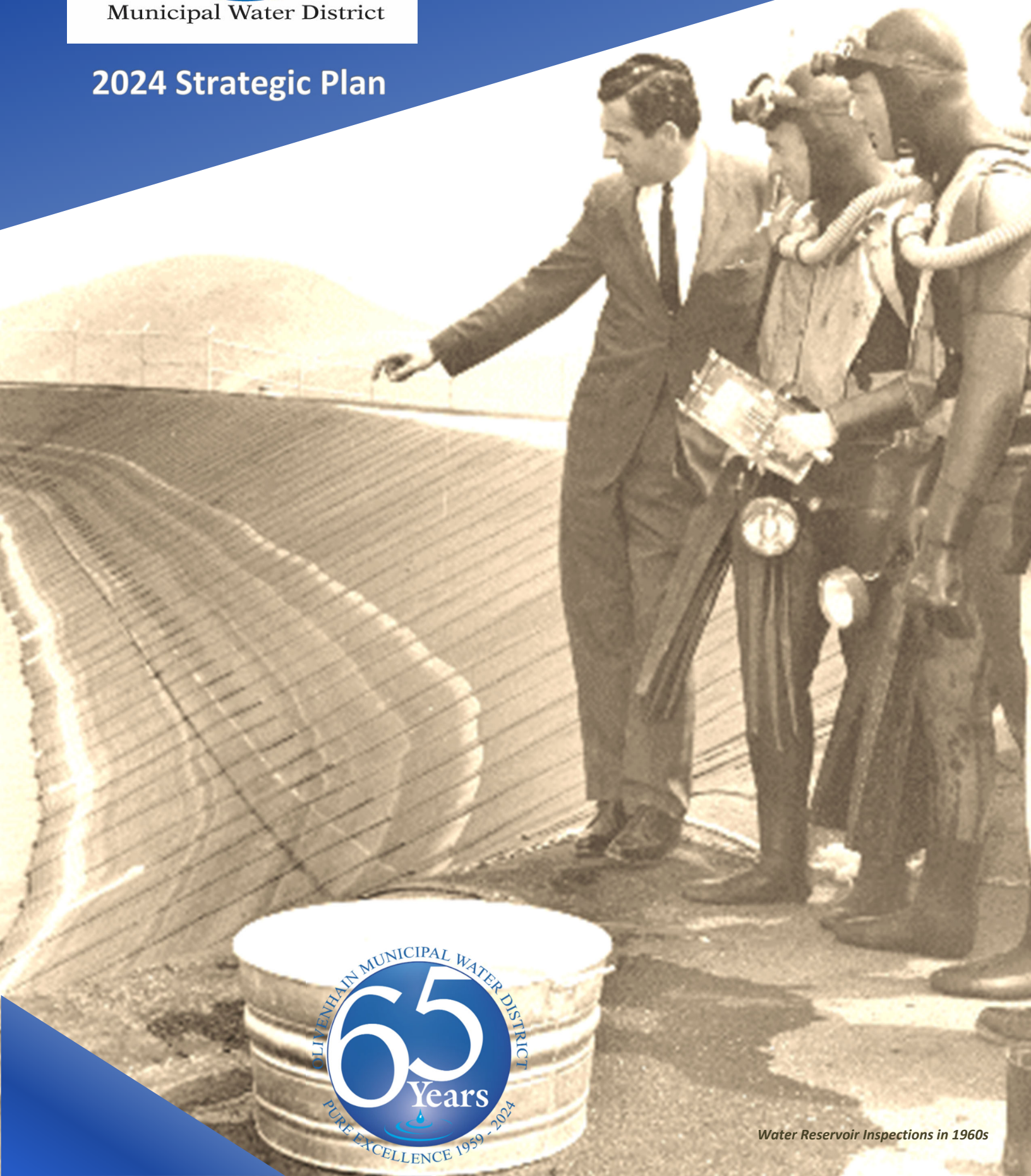


## 2024 Strategic Plan



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## introduction

Olivenhain Municipal Water District's Board of Directors first established a formal mission statement and goals in 1996. In 2002, OMWD updated the mission statement, revised the goals, and created objectives to uphold the mission and achieve the goals. Objectives are developed at the start of each year. The progress toward achievement of the objectives is reviewed throughout the year. Performance indicators, measured on a fiscal year basis, are included in OMWD's budget to complement the objectives. In 2004, the mission statement and goals were updated to incorporate new OMWD facilities and functions.

Initially developed by OMWD's board in 2008, the Strategic Plan incorporates the mission statement, established values, and strategies by which to achieve each of OMWD's goals and annual objectives. In 2019, OMWD's board established stretch objectives in addition to annual objectives. The Strategic Plan is updated annually after new objectives are adopted by the board.



## our values

*Beliefs that set the tone and direction of the workforce*

- Exercise responsible financial management
- Provide responsive customer service and open communication
- Promote ethical behavior in the conduct of district business
- Ensure fair and open processes involving the public
- Provide a healthy work environment
- Promote environmental responsibility and sustainability
- Ensure provisions for the future







## our vision

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### *What we aspire to be*

Olivenhain Municipal Water District aspires to cost-effectively provide high-quality services garnering the trust and respect of its customers, employees, partners, and fellow water agencies.

## our mission

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### *Why we do what we do*

Olivenhain Municipal Water District is a multi-functioning public agency that is dedicated and committed to serving present and future customers by:

#### ***water***

Providing safe, reliable, high-quality drinking water while exceeding all regulatory requirements in a cost-effective and environmentally responsive manner.

#### ***recycled water/wastewater treatment***

Providing recycled water and wastewater treatment in the most cost-effective and environmentally responsive method.

#### ***parks***

Safely operating Elfin Forest Recreational Reserve and providing all users with a unique recreational, educational, and environmental experience.

#### ***emergency management***

Complying with policies and procedures that adhere to local, state, and federal guidelines for national security and disaster preparedness.

#### ***sustainable operations***

Pursuing alternative and/or renewable resources with the most sustainable, efficient, and cost-effective approach.

## our goals

### *What we strive to achieve*

1. Provide safe, reliable, high-quality drinking water to each customer in a cost-effective manner;
2. Provide wastewater collection services and reclamation in an environmentally responsible manner; and produce and supply high-quality recycled water to irrigation customers in support of regional water conservation efforts;
3. Operate Elfin Forest Recreational Reserve in the most cost-effective, safe, environmentally responsive, and service-oriented manner;
4. Pursue alternative and/or renewable resources as a means of offsetting costs and energy charges, providing sustainability;
5. Provide a safe, healthful, and rewarding work environment that encourages communication as well as values employee participation and personal achievement;
6. Exceed all federal, state, and local regulatory requirements for providing potable water, water reclamation, and recycled water;
7. Minimize all operational costs while maintaining a high level of customer service;
8. Maintain open communication and participation with the public through active conservation and educational programs as well as continually seeking customer input for informed decision making;
9. Ensure that financial plans, policies, and practices maintain the ability to construct, operate, and maintain all approved facilities, including replacement funds for future needs;
10. Plan and construct facilities to meet long-term water storage, treatment, transmission, and distribution needs;
11. Establish programs and policies to develop alternative water supplies to serve existing and future customers;
12. Cultivate supportive and positive relationships with federal, state, and local agencies, which may impact OMWD operations.

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## goal 1

### Provide safe, reliable, high-quality water to each customer in a cost-effective manner

Strategy: Preserve existing assets and facilities while planning for future needs and demands by way of the Comprehensive Facilities Master Plan, the Urban Water Management Plan, annual capacity fee studies, and annual objectives

#### 2024 Calendar Year Objectives

1. Commence construction on the Unit A North Rancho Santa Fe Road Potable Water Pipeline Replacement Project pursuant to the recently completed condition assessment
2. Commence construction of two pressure reducing station replacements to minimize water loss and control replacement of aging infrastructure
3. Complete Train 5 membrane replacement at David C. McCollom Water Treatment Plant (DCMWTP)
4. Commence construction of Stage 4 upgrades, including second centrifuge, at DCMWTP
5. Complete Phase 1A of systemwide programmable logic controller upgrades
6. Complete Customer Side Lead Service Line Inventory and report results to State Water Resources Control Board's (SWRCB) Division of Drinking Water (DDW)
7. Enhance experience of in-house staff by completing the replacement of 25 valves in support of the Valve Replacement Project.
8. Outside of bird breeding season, complete maintenance of five impacted easements

#### Stretch Objective

- Complete replacement of five additional valves beyond Objective 7
- Complete maintenance of three additional impacted easements beyond Objective 8



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## goal 2

**Provide wastewater collection and treatment services in an environmentally responsible manner, and produce and supply high-quality recycled water to irrigation customers in support of regional water conservation efforts**

Strategy: Expand development and implement widespread use of recycled water through the Sewer System Master Plan, the Urban Water Management Plan, and annual objectives

### 2024 Calendar Year Objectives

9. Complete construction at two of three sites for the Calle Barcelona, Village Park, and Summerhill recycled water pipelines
10. Complete construction on the Neighborhood 1 Sewer Pump Station Replacement Project
11. Make three new connections to the recycled water distribution system; provide to the board a comprehensive presentation on OMWD's recycled water program, including current project status, grant funding, and plans for system expansion
12. Procure and install flow monitoring equipment in Rancho Cielo collection system to assist in inflow and infiltration detection
13. Complete design of headworks rehabilitation at 4S Ranch Water Reclamation Facility (4S WRF)
14. Complete district-wide supervisory control and data acquisition (SCADA) upgrades for distribution system and 4S WRF

### Stretch Objective

- Complete two additional meter connections to the recycled water distribution beyond Objective 11

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## goal 3

### Operate Elfin Forest Recreational Reserve in the most cost-effective, safe, and environmentally responsive and service-oriented manner

Strategy: Work with community and local organizations to efficiently operate EFRR, utilizing grant funding and the Mount Israel Recreation Master Plan

#### 2024 Calendar Year Objectives

15. Provide update to Elfin Forest Recreational Reserve Executive Committee on status of the EFRR overflow parking lot expansion project, including design, environmental process, and grant funding
16. Revisit with EFRR Executive Committee the 2023 Nossaman memorandum on accessibility at EFRR; present results to full board
17. Continue education program for elementary schools in partnership with the Escondido Creek Conservancy, providing at least 2,000 students with in-person field trips to EFRR
18. Utilize volunteer groups such as San Diego Mountain Biking Association and EFRR trail patrol for two trail maintenance/repair projects
19. Participate in I Love a Clean San Diego Creek to Bay Cleanup event
20. Launch 18<sup>th</sup> annual photo contest
21. Submit grant proposal to fund trail rehabilitation
22. Utilize past Gold Spotted Oak Borer monitoring data to identify and treat problem areas, focusing on "high value" trees for treatment (e.g., 12"+ diameter, in aesthetically valuable area, etc.); target treatment of at least 150 trees
23. Host water conservation workshop at Elfin Forest Interpretive Center Honoring Susan J. Varty
24. Demonstrate appreciation to EFRR volunteers by providing two educational field trips
25. Commemorate 15<sup>th</sup> anniversary of Elfin Forest Interpretive Center Honoring Susan J. Varty

#### Stretch Objective

- Utilize volunteer groups for two additional maintenance or cleanup events at EFRR

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## goal 4

### **Pursue alternative and renewable energy sources as a means of offsetting costs and energy charges, providing sustainability**

Strategy: Work with local utility companies and regional partners on regional alternative energy-generating programs

#### **2024 Calendar Year Objectives**

26. Develop strategy to address new California Air Resources Board zero-emission vehicle requirements, including timeline, compliance, phasing, budgets, financing options, and exemption request; provide report to Facilities Committee
27. Continue partnerships with energy providers and third-party consultants to optimize energy costs, including amending agreement with 3 Phases Renewables to extend term of service

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## goal 5

### **Provide a safe, healthful, and rewarding work environment which encourages communication as well as values employee participation and personal achievement**

Strategy: Develop and implement workforce plans—including the staffing analysis, annual performance reviews, and team pledge—that identify more efficient methods to perform work, ensure critical work is performed, meet future workforce needs, enhance the ability to recruit a highly qualified and diverse staff, and develop employees to meet workforce demands

#### **2024 Calendar Year Objectives**

28. Complete the comprehensive salary survey in spring as negotiated in OMWD's Memorandum of Understanding (MOU); present to Personnel Committee then to board
29. Prepare the five-year staffing analysis succession planning document; present to Personnel Committee then to board
30. Conduct training on effective workplace verbal communication skills for all employees
31. Conduct review of staff turnover in fall as negotiated in the MOU to evaluate if moving to the 65<sup>th</sup> percentile in compensation has reduced employee turnover; present to Personnel Committee then to board
32. Implement a new online employment application system on OMWD website to improve data security
33. Enhance employee health and wellness by hosting a voluntary wellness challenge for staff
34. Prepare a SWRCB DDW request for treatment operator staff to receive partial distribution credit towards advanced certification

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## goal 6

### Exceed all federal, state, and local regulatory requirements for providing potable water, wastewater treatment, and recycled water

Strategy: Operate and maintain facilities to surpass regulations with a margin of safety to meet customer expectations

#### 2024 Calendar Year Objectives

35. Upon adoption of SWRCB water use efficiency regulations, perform analysis and report to Customer Outreach and Conservation Committee
36. Commence United States Environmental Protection Agency Unregulated Contaminant Monitoring Rule 5 sampling and approve certified lab results
37. Continue interdepartmental Stormwater Pollution Prevention Plan committee to provide greater oversight for stormwater issues at headquarters; conduct four quarterly meetings



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## goal 7

### Minimize OMWD operational costs while maintaining a high level of customer service

Strategy: Continually seek grant funding and create programs that will offset costs

#### 2024 Calendar Year Objectives

38. Continue to pursue local, state, federal, and private grant funding to offset costs
39. Develop and implement process to increase customer communication by email, including sending new customer welcome letters electronically, reducing printing and postage costs
40. Increase customer use of online billing services, targeting 500 accounts newly enrolled in online payments
41. Complete Phase 9 of the Advanced Metering Infrastructure Expansion Project, upgrading over 1,800 meters to AMI technology
42. If grant funding is available, partner with Asterra on satellite leak detection program and present cost-benefit analysis to Facilities Committee

#### Stretch Objectives

- Achieve one or more new grant awards
- Add 500 new subscribers to the MyWaterUse by AquaHawk digital dashboard

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## goal 8

**Maintain open communication and participation with the public through active conservation and educational programs, as well as continually seek customer input for informed decision-making**

Strategy: Conduct community and customer outreach and provide opportunities for public input and participation, utilizing strategies outlined in the Urban Water Management Plan and annual objectives

### 2024 Calendar Year Objectives

43. Commemorate OMWD's 65<sup>th</sup> anniversary
44. Install informational signage at DCMWTP to improve guest experience
45. Partner with local businesses, vendors, and community organizations on a public service announcement and/or event about water use efficiency
46. Continue to develop messaging to protect customers' interests and ensure customer awareness of SWRCB water use efficiency regulations and new legislative requirements
47. Achieve Special District Leadership Foundation's Transparency Certificate of Excellence and District of Distinction re-accreditation

### Stretch Objective

- Win award from California Special Districts Association, Association of California Water Agencies, California Water Environment Association, or other industry group

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## goal 9

**Ensure that financial plans, policies, and practices maintain the ability to construct, operate, and maintain all approved facilities including replacement funds for future needs**

Strategy: Review plans and implement necessary updates and enhancements through the use of the Long-Range Financial Plan and annual budget

### 2024 Calendar Year Objectives

48. Complete update of wastewater cost of service study
49. Complete potable and recycled water cost of service study, including review of the Rate Reimbursement Credit Program
50. Complete public notice of increases in wastewater rates and charges per Proposition 218
51. Complete public notice of increases in potable water and recycled water rates and charges per Proposition 218
52. Complete annual review of water-related service charges
53. Implement second phase of water capacity fee increases
54. Complete Biennial Operating and Capital Budget for fiscal years 2025 and 2026
55. Continue to explore potential expense reduction options as part of the annual budget process
56. Complete Annual Comprehensive Financial Report and single audit report for fiscal year 2024
57. As part of the budget process for 2024, address and mitigate any extraordinary CY 2025 wholesale rate increases above those contemplated in prior financial planning, including potential expense reduction options relative to San Diego County Water Authority's (SDCWA) CY 2025 rate

### Stretch Objective

- Assess feasibility for Pinnacles Community Facilities District financing with California Statewide Communities Development Authority and Pinnacles developer; review with Finance Committee

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## goal 10

### Plan and construct facilities to meet long-term water storage, treatment, transmission, and distribution needs

Strategy: Maintain coordinated master plans for all facilities based on condition and performance assessments and anticipated future needs

#### 2024 Calendar Year Objectives

- 58. Update the 10-year Capital Improvement Plan
- 59. Complete Potable Water and Recycled Water Master Plan update
- 60. Complete update to Wastewater Master Plan
- 61. Incorporate 2023 condition assessment results for DCMWTP, 4S WRF, wastewater system, and pipeline replacement into 2024 budget process, cost of service update, and Proposition 218 notices per the recommendation of the Facilities Committee

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## goal 11

### Establish programs and policies to develop alternative water supplies to serve existing and future customers

Strategy: Pursue recycled water, desalination, and conservation opportunities

#### 2024 Calendar Year Objectives

62. Continue to advance San Dieguito Valley Groundwater Project, including conducting additional hydrogeologic studies, conducting independent risk evaluation workshop, updating/refining economic analysis, and developing a water rate impact strategy; present progress reports, including project schedule and decision points, to board at least twice during the calendar year



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## goal 12

### Cultivate supportive and positive relationships with the federal, state, and local agencies that may impact OMWD operations

Strategy: Continue involvement and participation with partner agencies and organizations

#### 2024 Calendar Year Objectives

63. Engage and influence SWRCB regulations and water use efficiency legislation utilizing OMWD's advocate in Sacramento
64. Coordinate with County of San Diego on board filings for the 2024 election
65. Work with San Diego Local Agency Formation Commission (SD LAFCO) on the preparation of municipal service reviews (MSR) for the Encinitas and Carlsbad areas; in conjunction with MSR completion, perform analysis of organizational efficiencies between OMWD and Leucadia Wastewater District, and provide report to board
66. Actively participate and advocate for OMWD interests on SD LAFCO key initiative areas for 2024, including but not limited to development of the "out of agency service agreements policy" and the MSRs of wholesale water providers in San Diego County; make presentation to board
67. Work with SDCWA to advance OMWD's legislative proposal to amend Public Contract Code to raise the limit for public works bidding requirements to match other public agencies throughout California
68. Continue work and active advocacy with Water for All statewide coalition (formerly Solve the Water Crisis) to advance Senate Bill 366 through the legislature, which sets specific targets for new water supply development and adequate funding for these projects; make presentation to board
69. Continue efforts with SDCWA on the development, implementation, and phase-in of a new equitable fixed rate component to SDCWA rates via the Member Agency Workgroup, the Financial Strategy Workgroup, and OMWD's SDCWA board representative
70. Work with legislators and member agencies to pursue equitable voting structure at SDCWA