

Mt. View Sanitary District Strategic Plan 2025-2030



Martinez, CA
Founded 1923



STRATEGIC PLAN 2025 – 2030

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District Leadership

Lilia M. Corona, General Manager

Stacey Ambrose, Deputy General Manager

Chris Elliott, District Engineer

Scott Biocic, Wastewater Operations Manager

J. Daniel Adams, Consultant District Counsel



Governing Board of Directors

Gregory T. Pyka, President

Jared D. Ruddell, Vice President

Julia R. Halsne

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ACRONYM GLOSSARY



ADA	Americans with Disabilities Act
AI	Artificial Intelligence
BAAD	Bay Area Air District
BACWA	Bay Area Clean Water Agencies
BAPPG	Bay Area Pollution Prevention Group
CARB	California Air Resources Board
CASA	California Association of Sanitary Agencies
CIP	Capital Improvement Plan
CWEA	California Water Environment Association
EPA	Environmental Protection Agency
EUM	Effective Utility Management
GIS	Geographic Information System
HHW	Household Hazardous Waste
I&I	Inflow and Infiltration
MMS	Mobile Management System
MVSD	Mt. View Sanitary District
NPDES	National Pollutant Discharge Elimination System
OPEB	Other Post-Employment Benefits
PM	Preventative Maintenance
RWQCB	Regional Water Quality Control Board
SERP	Sewer Emergency Response Plan
SOP	Standard Operating Procedure
SSC	Sanitary Sewer Call
SSS	Sanitary Sewer Spill
SWOT	Strengths, Weaknesses, Opportunities, Threats
SWRCB	State Water Resources Control Board



INTRODUCTION

The Mt. View Sanitary District (District) was formed as an independent special district in 1923 and is governed by a five-member publicly elected Board of Directors. The District now serves a population of about 21,000, manages an advanced secondary wastewater treatment plant, four pump stations, and 73 miles of sewer, and treats about 1 million gallons of wastewater per day with a lean, highly skilled, and dedicated staff of 19.

The District has a strong history of innovation, solid planning, environmental consciousness, and prudent financial management. It is in this spirit of management excellence that the District created a proactive and deliberate Strategic Plan to guide it into the future. The plan reflects the expertise, insights, and direction of the Board of Directors and all staff. It incorporates the District's mission, vision, and core values, and it identifies goals, strategies, objectives, and metrics that serve as a roadmap for staff to set priorities, make decisions, and allocate resources.

The District is conducting a feasibility study with neighboring agency, Central San, and a third-party consultant to determine if it is in the best interest of both Districts and their respective rate payers to consolidate into one agency. The outcome of that study is not yet known; however, the potential of consolidation was weighed carefully in developing this Strategic Plan.



21,000

People Served



90%

of Total Waste
is Residential



10%

of Total Waste
is from Small
Businesses



1 Million

Gallons Per Day
of Wastewater
Treated



73

Miles of Sewers



4

Pump Stations

BRIEF MVSD HISTORY

MVSD

1923

FORMATION as an independent special district



1951

CONSTRUCTION of a primary treatment plant to discharge to Peyton Slough with influent pump station, primary clarifier, anaerobic digester, and operations building



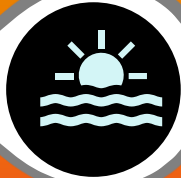
1974 - 1977

ESTABLISHMENT of Moorhen Marsh as the 1st constructed wetland on the west coast using secondary treated effluent, as a response to the Clean Water Act's establishment of discharge limits



1984 - 1987

ACQUISITION of 22-acres of McNabney Marsh, expanded to 69-acres three years later



1920 - 1930

FORMATION of a system of sewers that discharge to a community septic tank



1968

ONE OF FIRST in the Bay Area to provide full secondary treatment, including biofilter, additional clarifier and digester, thickener, and chlorine gas



1974 - 1984

ADDITION of dechlorination station, final effluent monitoring station, and sludge dewatering building using a belt press



1988

INSTALLATION of the biotower for ammonia removal and conversion from chlorine gas to liquid chlorine



BRIEF MVSD HISTORY

MVSD



1993

FIRST Northern California publicly owned treatment works to implement UV disinfection in full-scale operation



1996

ESTABLISHMENT of the award-winning Wetlands Field Trip Program



1999

UPGRADED the dewatering system from belt press to centrifuge



2002

FIRST publicly owned treatment works in the Bay Area to be certified as a Green Business, certification maintained through current year



2015

EARNED the District Transparency Certificate of Excellence, maintained through current year



2017 - 2019

IMPROVEMENT of Moorhen Marsh through pond, habitat, and control structure improvements and the addition of an ADA trail, a viewing platform, and a native garden



2023

MVSD celebrates 100 years of serving the public

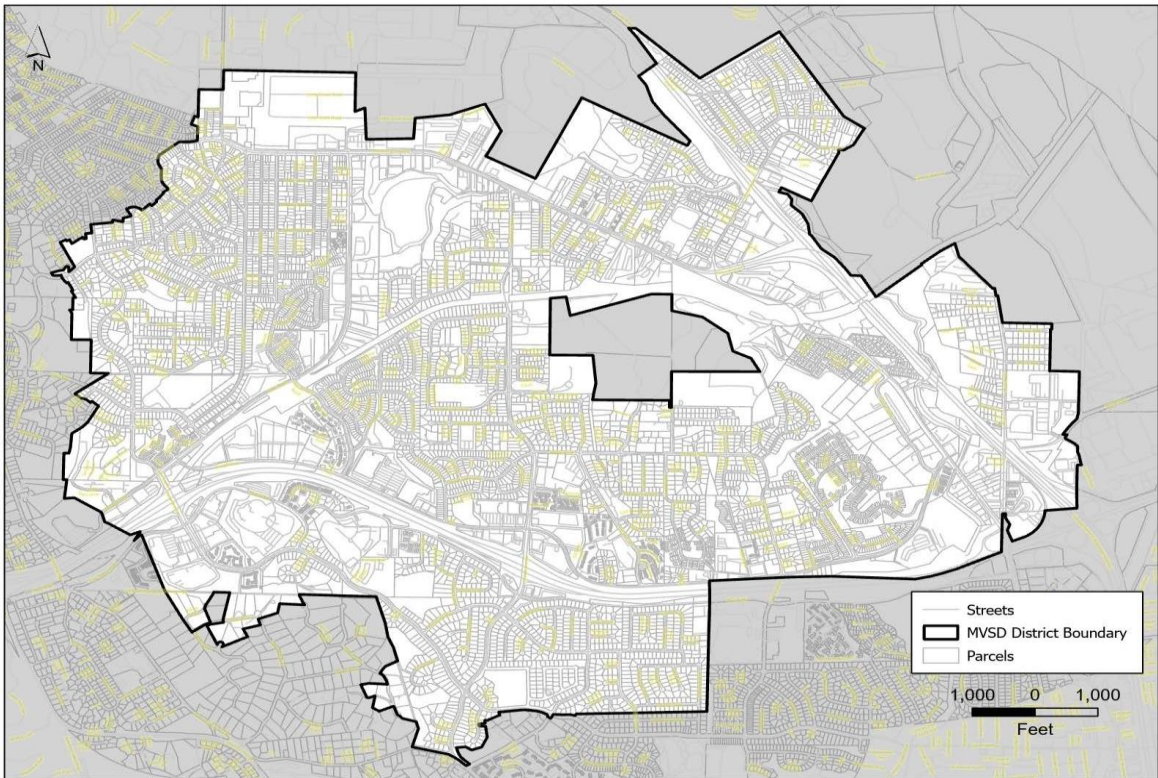


2025

REPLACEMENT of the UV disinfection system



MVSD Service Area



STRATEGIC PLANNING PROCESS

The goal of the strategic planning process is to deliver a framework for decision making. It is a top-level document that provides a roadmap of actions, in a defined future term, that supports defined goals. A strategic plan should be visionary, conceptual, and directional. It is developed through planning sessions that consider the District's mission, vision, and values as well as current activities and needs and those forecast for the future.

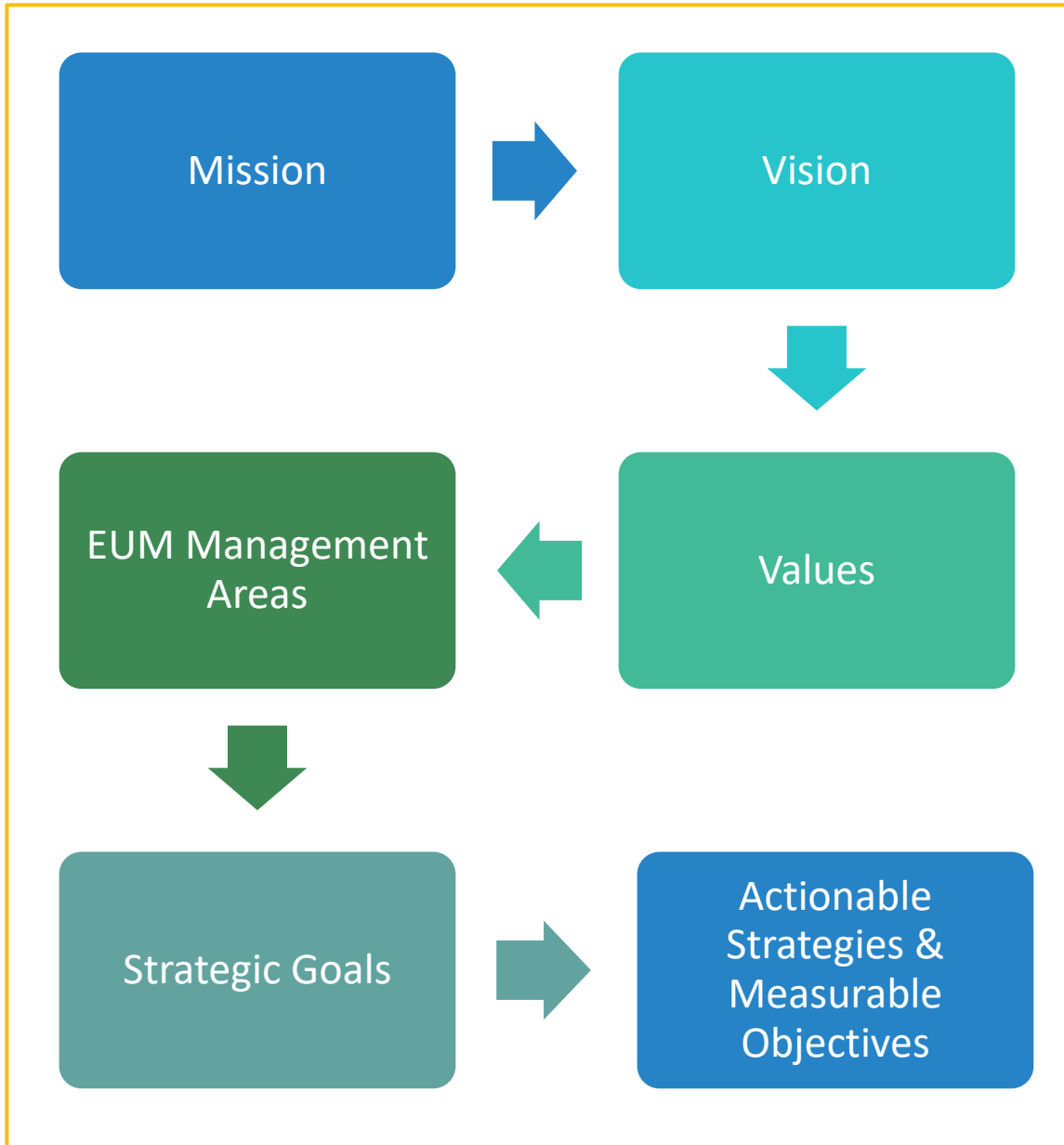
This Strategic Plan provides goals, implementation strategies, key objectives, and metrics through the end of 2030. The goals, strategies, objectives, and metrics in the first years of this plan are those determined to be beneficial or mandatory regardless of the outcome of the consolidation feasibility study. The goals, strategies, objectives, and metrics in the later years are those that provide for the longer term needs of the District if consolidation does not move forward. The District is committed to not investing in large CIP projects unless and until it is determined that consolidation will not move forward.

The planning process for this Strategic Plan included Strengths, Weaknesses, Opportunities, and Threats (SWOT) analysis and Effective Utility Management (EUM) self-assessment and management area priority ranking. Three independent SWOT brainstorming sessions were held, one with staff only, one with the District's Focus Group (General Manager, Deputy General Manager, District Engineer, Wastewater Operations Manager, and District Legal Counsel), and one with the Board of Directors. The results of each session were compiled and prioritized. The EUM self-assessment and management area priority ranking were completed by the Focus Group and the Board of Directors. The self-assessment defined each of the ten EUM Key Management Areas, and the participants rated the District's current achievement as low, medium, or high for each management area. The management area priority ranking used a forced ranking format for each participant to rank the ten Key Management Areas based on their personal interpretation of the District's current state and needs.

The results of each planning exercise were compiled and used to develop goals for this Plan. Implementation strategies, key objectives, and metrics were then identified through a collaborative effort with the management team. The implementation strategies are the actions identified as priorities to achieve the goals. The key objectives are the specific tasks to implement the strategies. The metrics are the things staff will measure to show the success of the objectives.

This Plan will guide staff in their efforts to deliver the expected excellent public service to rate payers with ever-improving efficiency, effectiveness, and creativity. It is a living document that will adapt to new priorities as they arise, as increased regulations, emerging technology, budgetary shifts, or engaged community input are always a potential. The Plan will be reviewed annually to track its implementation and will be updated as appropriate to ensure it continues to accurately reflect the District's mission, vision, and values.

Strategic goals and their associated implementation strategies, key objectives, and metrics are all linked back to the District's Mission, Vision, and Values. While this Plan is a guide for the next five years, the District's Mission, Vision, and Values remain the guiding beacon for success.



Mission sets the purpose. At the highest level, it says why we are here.



OUR MISSION

To protect the public health and environment, in a safe and reliable manner, at a reasonable cost.

Vision describes what we want to achieve; it is our desired future. It drives strategy and tactics to achieve the mission.



OUR VISION

To honor a continuous improvement philosophy that upholds organizational excellence through proactive management of infrastructure and dedication to environmental stewardship, public outreach, customer service, safety, and fiscal responsibility by sustaining a highly qualified workforce.

Values reflect core principles and guidelines that influence decision making. They shape culture, behavior, and actions.



OUR VALUES

- Quality customer service and high value to our ratepayers
- Infrastructure health
- Financially responsible stewardship
- Protection and enhancement of the environment
- Meeting or exceeding all regulatory requirements
- Efficient and progressive techniques, equipment, and methodologies
- Public involvement and environmental education
- Employee welfare



While the District's Mission, Vision, and Values define our purpose, desired future, and core principles and guidelines, the District also has Cultural Values that define the traits that all District staff are expected to exhibit in their daily work. The Cultural Values were developed by staff through a lengthy interactive process. The Values are well-integrated in the District, and all staff are measured against these values in their annual performance evaluations to ensure that not only high-performance is maintained but also a high-level commitment to a positive culture for everyone.



R E S P E C T

Committed to others' well-being • Valuing others for who they are & what they offer (even when we disagree) • Looking for opportunities to make a difference and add value • Showing compassion & consideration • Seeking to understand
• Behaving with grace, kindness, acceptance, and concern

A C C O U N T A B I L I T Y

Owning our work • Holding each other & ourselves responsible for (and accepting the outcomes of) our words, actions, or inactions • Realizing we play a part in every situation/experience with some degree of responsibility over outcomes or consequences • Striving to go above & beyond in all we do • Seeking to improve every day
• Always presuming other's best intentions

I N T E G R I T Y

Acting in a transparent, trustworthy manner • Earning the respect of others • Always doing what we say we will do • Being reliable, ethical, and honest • Doing what's right – even when no one is watching • Being responsible for our actions

L E A D I N G B Y E X A M P L E

Modeling the behavior we want to see • Demonstrating kindness under pressure • Being a servant leader people follow without the title • Creating a trust culture • Serving with humility • Encouraging diversity of thought • Unselfishly empowering people • Fostering leadership in others

T E A M W O R K

Always lending a hand • Delivering as a team • Doing our best to turn ideas into solutions • Breaking down silos • Engaging with our colleagues • Collaborating to create something greater than ourselves as individuals • Working together towards a common goal for MVSD

P R O F E S S I O N A L I S M

Courteous, productive, responsible conduct • Doing our job with skill, competence, ethics, and civility • Communicating effectively and appropriately with uninterrupted active listening • Keeping sensitive information confidential • Gaining the trust of others by modeling trustworthy behavior

EFFECTIVE UTILITY MANAGEMENT: KEY MANAGEMENT AREAS

The ten EUM Key Management Areas provide a clear set of reference points to guide balanced future planning that addresses all important operational areas of the District and prevents reactively moving from one problem of the day to the next. Below are the ten EUM Key Management Areas, in order of priority, as ranked by District leadership and the Board of Directors.

1. Financial Viability (FV)
2. Product Quality (PQ)
3. Infrastructure Stability (IS)
4. Operational Optimization (OO)
5. Operational Resiliency (OR)
6. Customer Satisfaction (CS)
7. Community Sustainability & Development (CD)
8. Employee and Leadership Development (ED)
9. Water Resource Adequacy (WA)
10. Stakeholder Understanding & Support (SS)

The top four priorities are the focus of this Strategic Plan. They are the priorities for which goals, implementation strategies, key objectives, and metrics were developed.

The goals of this Strategic Plan are:

1. **Financial Viability (FV)** – Manage financial resources to protect financial security and meet funding needs while maintaining fair, affordable, and predictable rates.
2. **Product Quality (PQ)** – Reliably meet environmental regulatory requirements to meet customer, public health, and ecological needs and expectations.
3. **Infrastructure Stability (IS)** – Maintain District infrastructure to ensure dependability in providing reliable, high-quality service through prioritized and cost-effective asset management and capital investment.
4. **Operational Optimization (OO)** – Provide reliable wastewater treatment in a cost-efficient manner that takes advantage of available technologies.

FINANCIAL VIABILITY

STRATEGIC GOAL

1

Manage financial resources to protect financial security and meet funding needs while maintaining fair, affordable, and predictable rates.

Strategy 1.1: Conduct financial planning that provides for operating and capital expenditures, revenue needs, financing assumptions, rate adjustment needs, and pension liability.

Objectives:

- 1.1.1. Conduct a 5-year rate study and implement legal, fair, and reasonable rates that meet revenue needs with a target capital expenditure average of \$2M/year.
 - 1.1.2 Review annually, and update as appropriate, reserve policies to ensure they are adequate to address unpredicted emergency projects and to protect long-term sustainability.
 - 1.1.3 Review, and update as appropriate, investment and banking strategies to ensure optimized returns.
 - 1.1.4 Evaluate options and develop a strategy for prefunding pension and OPEB liability that provides appropriate security and liquidity and build a funding plan into the annual budget process.
-

Strategy 1.2: Maintain financial stability.

Objectives:

- 1.2.1 Increase participation in and applications to grants and subsidized loan funding opportunities to help offset rate increases and prevent sharp increases. Report funding applications and awards quarterly.
 - 1.2.2 Support and participate in the efforts to pursue consolidation of the District's garbage franchise agreement with the County's to avoid District staffing or consulting expenses needed to meet increased regulatory requirements.
 - 1.2.3 Investigate design/build/fund project opportunities and implement a plan as appropriate.
 - 1.2.4 Integrate funding opportunity research as a component of every project.
 - 1.2.5 Evaluate options for alternative contract procurement processes for non-CIP projects to streamline the process, utilize resources more efficiently, and ensure the District's interests are protected. Implement a new plan for staff.
-

FINANCIAL VIABILITY (cont'd)

STRATEGIC GOAL

1

Manage financial resources to protect financial security and meet funding needs while maintaining fair, affordable, and predictable rates.

Strategy 1.3: Ensure transparency and accountability in financial management.

Objectives:

- 1.3.1 Provide transparent, accurate, timely, and meaningful financial reporting to leadership and regulatory bodies.
- 1.3.2 Annually evaluate internal controls for effectiveness and ensure procedures are updated and strictly followed.
- 1.3.3 Adhere to Government Finance Officers Association best practices for excellence and transparency in financial reporting and seek the Certificate of Achievement for Excellence in Financial Reporting.
- 1.3.4 Implement new, clear, informative, and transparent Proposition 218 materials and enhance public engagement.

Financial Viability Success Indicators

Metric	Target
Meaningful and timely budget to actual provided to leadership team quarterly?	Yes
Alternate funding research reported to GM for each project?	Yes / #
Funding opportunity applications and awards reported to the Board quarterly?	Yes / #
District sewer rates vs Bay Area average evaluated annually	< average
O&M Reserves	≥ \$1M
Capital Reserves	≥ \$1.5M
Debt service ratio	> 2.0
Annual Actual Expenditures vs Budget	90 - 100%
Number of "Material Weaknesses" or "Significant Deficiencies" identified in annual audit of financial reports	0

PRODUCT QUALITY

STRATEGIC GOAL

2

Reliably meet environmental regulatory requirements to meet customer, public health, and ecological needs and expectations.

Strategy 2.1: Sustain 100% compliance with NPDES and other associated permits.

Objectives:

- 2.1.1 Evaluate Moorhen Marsh for deficiencies that may impact discharge quality through interruption of steady flow through the treatment ponds and to the receiving waters and integrate a plan into long-term strategies.
 - 2.1.2 Research and implement nature-based solutions as a nutrient reduction enhancement strategy in Moorhen Marsh.
 - 2.1.3 Provide focused outreach that promotes pollution prevention measures focused on pollutants of concern and the use of the HHW facility.
-

Strategy 2.2: Sustain 100% compliance with collection system regulations and associated permits.

Objectives:

- 2.2.1 Leverage the source control support contract to improve pollution prevention efforts with grease dischargers.
 - 2.2.2 Create a searchable, digital tracking system that includes private lateral issues, locations, and frequency to inform the development of a Private Lateral Program and to inform the development and deployment of outreach that promotes property owner maintenance of sewer laterals to reduce the impact of lateral issues on District sewers.
 - 2.2.3 Develop and maintain a current list of corrective maintenance issues and proactively communicate these to the District Engineer to determine an appropriate approach to address the issue (CIP integration, scheduled in-house repair, or emergency repair).
 - 2.2.4 Leverage SmartCover data, MMS, the Condition Assessment Program risk model, and other data sources to identify higher-risk lines and create a system for improved proactive maintenance that is documented in MMS.
 - 2.2.5 Develop an SOP for source control and customer outreach after an SSO/SSC.
-

PRODUCT QUALITY (cont'd)

STRATEGIC GOAL

2

Reliably meet environmental regulatory requirements to meet customer, public health, and ecological needs and expectations.

Strategy 2.3: Sustain 100% compliance with air regulations and permits.

Objectives:

- 2.3.1 Audit all air permits and update them to reflect current facility equipment and operations and investigate options for replacing any equipment nearing non-compliance with new regulations.
 - 2.3.2 Establish or update all air regulation SOPs, develop a tracking system, and maintain compliance with all programs.
 - 2.3.3 Conduct a study to identify needs for complying with CARB fleet electrification regulations.
-

Strategy 2.4: Enhance staff training and development to maintain a well-educated and trained staff that stays current on updated regulations, technologies, and methods to maintain compliance.

Objectives:

- 2.4.1 Develop a District training plan that outlines minimum training requirements and encourages access to staff training and development.
 - 2.4.2 Participate in collaborative efforts to meet permit compliance through regional partnerships.
 - 2.4.3 Enhance Collection System training for all operators (vehicle operation, traffic control, spill estimation, SERP, new technology).
 - 2.4.4 Promote attendance at regional conferences and workshops relevant to staff's area of expertise.
-

PRODUCT QUALITY (cont'd)

STRATEGIC GOAL

2

Reliably meet environmental regulatory requirements to meet customer, public health, and ecological needs and expectations.

Product Quality Success Indicators

Metric	Target	
Pollution prevention and HHW facility use outreach	6/quarter	
Private lateral outreach	3/quarter	
NPDES Permit limit exceedances	0	
Portion of collection system PMs completed on time	100%	
Number of SSOs	0	
Portion of staff completing required minimum training	100%	
Portion of staff attending career development or technical training	90%	
Portion of SSOs preventable by District function	0%	
Attendance at regional collaboration groups	BACWA Permit	5/year
	BACWA Lab	5/year
	BACWA Collections	5/year
	BAPPG	5/year



INFRASTRUCTURE STABILITY

STRATEGIC GOAL

3

Maintain District infrastructure to ensure dependability in providing reliable, high-quality service through prioritized and cost-effective asset management and capital investment.

Strategy 3.1: Steadily repair, replace, or rehabilitate aging treatment plant, collection system, and pump station infrastructure.

Objectives:

- 3.1.1 Conduct the design and construction of CIP projects based on priority as identified in the CIP that underwent the new vetting process and was approved in 2025, with a target of \$2M/year average expenditure.
 - 3.1.2 Develop a long-term collection system and pump station CIP program.
-

Strategy 3.2: Inflow and Infiltration (I&I) reduction.

Objectives:

- 3.2.1 Complete an I&I reduction study to identify sources of I&I and integrate a plan to eliminate I&I sources into the collection system CIP.
 - 3.2.2 Research and develop a plan for implementing a self-funded, low administration private sewer lateral program to help reduce the impact of private lateral issues on District sewers.
 - 3.2.3 Develop a plan for collection system repairs identified by the system assessment project.
-

Strategy 3.3: Enhance Asset Management Program.

Objectives:

- 3.3.1 Capture all asset management efforts in a formalized program document.
 - 3.3.2 Develop an SOP for clear and timely communication of asset additions and deletions between operations, engineering, and finance.
 - 3.3.3 Audit assets to identify all those within 5 years of expected life and develop a prioritized replacement or rehabilitation plan.
-

INFRASTRUCTURE STABILITY (cont'd)

STRATEGIC GOAL

3

Maintain District infrastructure to ensure dependability in providing reliable, high-quality service through prioritized and cost-effective asset management and capital investment.

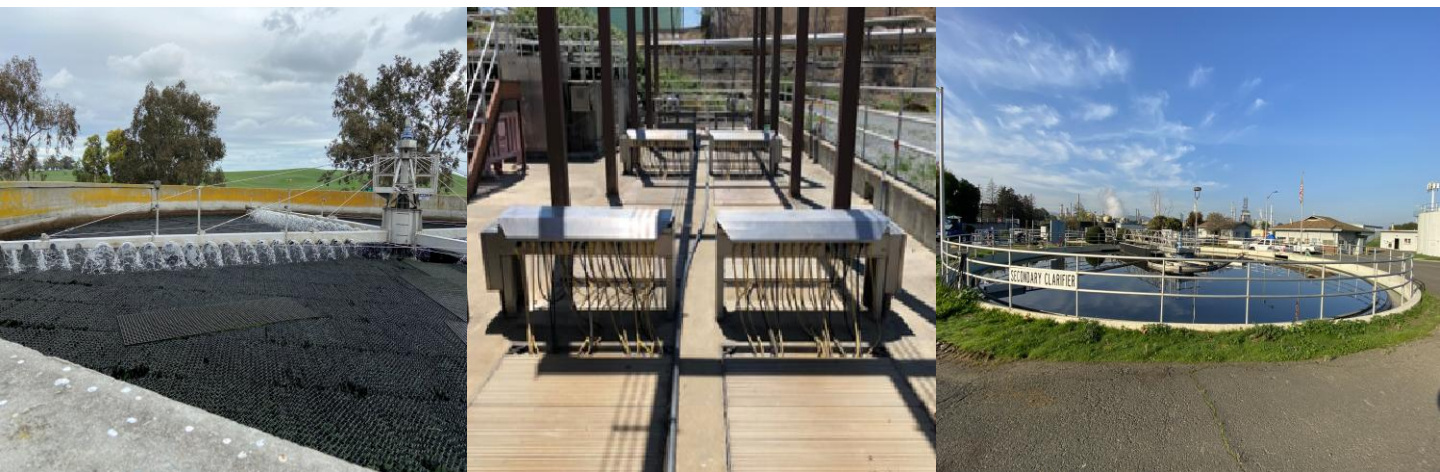
Strategy 3.4: Protect District infrastructure and staff through resiliency planning.

Objectives:

- 3.4.1 Investigate options for enhancing facility security to prevent vandalism, control access to sensitive areas, and protect staff safety.
- 3.4.2 Conduct an emergency resiliency study that addresses facility ingress and egress limitations, natural disasters, refinery proximity, and treatment facility emergencies.
- 3.4.3 Conduct a climate resiliency study that addresses obligations outlined in regulations.
- 3.4.4 Develop and continuously update a cybersecurity program that captures current practices and identifies needed improvements.

Infrastructure Stability Success Indicators

Metric	Target
CIP project expenditures/year	\$2M average
Inflow & Infiltration rate	< 40%



OPERATIONAL OPTIMIZATION

STRATEGIC GOAL

4

Provide reliable wastewater treatment in a cost-efficient manner that takes advantage of available technologies.

Strategy 4.1: Leverage existing data analytic tools to enhance the monitoring of treatment facility processes and identify opportunities to optimize the treatment process.

Objectives:

- 4.1.1 Define key parameters for each treatment unit and build dashboards and report templates for routine monitoring.
 - 4.1.2 Develop or update target operational ranges for each treatment unit for each season and develop or update SOPs for each treatment unit.
 - 4.1.3 Conduct a study to identify options for equalizing centrifuge centrate flow through the treatment plant to improve ammonia treatment efficiency and implement a plan.
-

Strategy 4.2: Define and document optimal biotower operation.

Objectives:

- 4.2.1 Study biotower operation (flush rate/intensity and drain vent blocks) and data (ammonia, DO, temp, TSS) and establish an SOP for biotower operation in all weather conditions.
 - 4.2.2 Develop a tracking system to monitor removal efficiencies and help predict end of life of the media.
-

Strategy 4.3: Investigate options for integrating Artificial Intelligence (AI) into District functions.

Objectives:

- 4.3.1 Develop an SOP on the use of AI.
 - 4.3.2 Implement basic training on the uses of AI and investigate options for using generative AI with staff.
 - 4.3.3 Investigate how machine learning AI might be leveraged for treatment plant or individual process optimization.
-

OPERATIONAL OPTIMIZATION (cont'd)

STRATEGIC GOAL

4

Provide reliable wastewater treatment in a cost-efficient manner that takes advantage of available technologies.

Strategy 4.4: Enhance District SOPs to ensure they remain relevant and capture options for improving efficiency through new technologies.

Objectives:

- 4.4.1 Continue to either develop SOPs or capture procedures in a desk manual for operations.
- 4.4.2 Implement a uniform system for tracking, updating, and posting SOPs on the District's intranet.

Infrastructure Stability Success Indicators

Metric		Target
Portion of SOPs reviewed and updated	Administration	100%
	Finance	100%
	Laboratory	100%
	Operations	100%
	Public Outreach	100%
	Engineering	100%
Treatment units meet established performance targets	Primary Clarifier	yes
	Biofilter	yes
	Biotower	yes
	Secondary Clarifier	yes
	Sand filter	yes
	Digester	yes

Manager's Goals and Objectives Summary and Timeline

Objective	Activity	Deliverable	FY	Lead
1.1	Conduct financial planning	Manager's Monthly Report to Board	26	GM
1.1.1	Conduct 5-year rate study	Submitted to Board for approval	26	GM
1.1.4	Develop pension and OPEB funding strategy	Manager's Monthly Report to Board	26	GM
1.2.2	Consolidate garbage franchise	Include updates in monthly Manager's Report to Board	26	DGM
1.2.5	Alternative contract procurement processes for non-CIP projects	Plan submitted to GM	26	DGM
1.3.4	Prop 218 outreach	Materials provided to public	26	POAS
2.2.2	Tracking system for private lateral issues	Report trends or observations to WOM	26	CL
2.3.1	Audit of all air permits	Report to DGM	26	WOM
2.3.2	Air regulation SOPs	SOPs completed, trained, posted on The Flow	26	WOM
3.3.2	Develop SOP for asset additions/deletions	SOP developed, trained, and posted on The Flow	26	DGM
3.4.4	Develop cybersecurity program	Report to Board	26	POAS
4.1.1	Treatment unit key parameter dashboards and report templates developed	Completion reported to GM and DGM and training provided to all operators	26	WOM
4.1.2	Treatment unit target operational ranges defined and SOPs developed	Completion reported to GM and DGM and training provided to all operation staff.	26	WOM
4.1.3	Study for centrifuge centrate equalization	Study and plan reported to GM and DGM	26	WOM
4.3.1	Develop AI SOP	Policy developed and all staff trained	26	DGM
1.1.2	Annual reserve policy review and update.	Manager's Monthly Report to Board	26-30	GM
1.1.3	Quarterly investment and banking returns.	Manager's Monthly Report to Board	26-30	GM

Manager's Goals and Objectives Summary and Timeline (cont'd)

Objective	Activity	Deliverable	FY	Lead
1.1.3	Annual investment and banking strategy evaluation and update.	Manager's Monthly Report to Board	26-30	GM
1.1.4	Integrate pension and OPEB funding strategy into annual budget process	Integrated into annual budget report to Board	26-30	GM
1.2.1	Report funding applications and awards quarterly	Manager's Monthly Report to Board	26-30	GM
1.2.4	Integrate funding opportunity research as a component of every project.	Prior to project implementation, report findings to GM for in-house projects or integrate findings into CIP reporting to the Board	26-30	ALL
1.3.1	Provide annual financial reports to regulatory bodies	Reports submitted to regulatory bodies and status provided to GM for reporting to the Board	26-30	AFA
1.3.1	Provide quarterly financial reports to leadership team	Timely reports submitted to the leadership team	26-30	AFA
1.3.2	Annual internal controls review	Status reported to GM	26-30	AFA
2.2.1	Provide more specific direction for source control inspection contract to target grease dischargers	Review annual inspection list and provide direction to redirect to high-risk businesses as needed	26-30	CL
1.2.3	Design/build/fund project opportunities	A plan for moving forward with D/B/F projects or report to Board specifying obstacles preventing implementation.	27	DE
2.1.2	Develop nature-based nutrient removal enhancement approach	Manager's Report to Board followed by nutrient removal efficiency reported in quarterly lab report to the Board	27	DGM
2.2.3	Collection system corrective maintenance documentation	System created and integrated into Ops-Eng Coordination meetings	27	CL
2.2.4	Collection system data tracking and evaluation system	System created and integrated into Ops-Eng Coordination meetings	27	CL
2.2.5	Post SSO/SSC event SOP	SOP developed, trained, and posted on TheFlow	27	CL

Manager's Goals and Objectives Summary and Timeline (cont'd)

Objective	Activity	Deliverable	FY	Lead
2.3.1	Investigate options for replacing equipment nearing air regulation non-compliance	Report to DGM and GM and integrated plan into annual budget	27	WOM
2.3.3	Conduct study for fleet electrification needs	Report to GM, DGM, DE	27	WOM
2.4.1	District training plan	Plan to GM and Monthly Manager's Report to the Board	27	DGM
3.4.1	Investigate options for further securing the facility	Report to GM	27	DGM
4.2.1	Study biotower operation and develop SOP for all seasons	Report to GM and DGM and all operation staff trained	27	WOM
1.3.3	Seek the Certificate of Achievement for Excellence in Financial Reporting	Submit application and report status to GM	28	AFA
1.3.3	Implement GFOA best practices	Status report to GM	28	AFA
3.2.2	Develop private sewer lateral program	Report to Board	28	CL
3.2.3	Develop collection system repair plan based on system assessment project	Report to GM	27	DE
3.3.3	Audit assets and develop plan to replace or rehabilitate	Report to DGM	28	WOM
3.4.3	Conduct Climate Resiliency study	Report to Board	28	DGM
4.3.2	Staff training on generative AI	Training provided to all staff	28	DGM
3.2.1	Conduct I&I reduction study	Report to Board	29	DE
3.3.1	Develop formalized capital asset program	Report to Board	29	DGM
4.3.3	Investigate options for leveraging machine learning AI	Report to GM and DGM and all operation staff trained	29	WOM
3.4.2	Conduct Emergency Resiliency Study	Report to Board	29	WOM
2.1.1	Moorhen infrastructure evaluation	Report of finding to Board	30	DGM
3.1.2	Collection system and Pump station CIP development	Report to Board	30	DE

Staff Acronyms

GM	General Manager	AFA	Accounting & Finance Administrator
DGM	Deputy General Manager	CL	Collections Lead
DE	District Engineer	POAS	Public Outreach & Admin Services Supervisor
WOM	Wastewater Operations Manager		

STRATEGIC PLAN IMPLEMENTATION AND MAINTENANCE

This Strategic Plan will be implemented upon the Board of Directors' approval. The implementation phase is the duration of the Strategic Plan and includes all work to achieve the goals, strategies, and objectives. Objectives have identified timelines that are provided in the Manager's Goals and Objectives Summary and Timeline. Progress in achieving the objectives will be reported annually to the Board of Directors in the Annual Strategic Plan Workshop, as required by Board Policy and Procedure B-100-20-2. The General Manager will work with the leadership team to conduct internal reviews of the Plan in advance of the Annual Workshop to define the status of the existing goals, strategies, and objectives and identify any new District priorities that may need to be integrated into the Strategic Plan to ensure the plan remains relevant. The Annual Workshop will focus on the following:

1. A detailed status report from the General Manager on the progress made in achieving the current year's goals, strategies, and objectives.
2. An annual review of the Strategic Plan to confirm its continued relevance for the following year.
3. Adoption of goals and objectives for the following year.
4. Addressing any other matters of concern to the Board.

New Strategic Plans are generally implemented every five years. Implementation of a new plan will involve the comprehensive process previously described with a focus on the next five years, but with a 10-year long-range horizon in mind.

