

# Strategic Plan for the **Mt. View Sanitary District**



MARTINEZ, CA • FOUNDED 1923

April 2021

**Governing Board of Directors**

Elmer "Al" J. Schaal, President

David P. Maggi, Vice President

Stanley R. Caldwell

Brian A. Danley

Gregory T. Pyka

**District Staff**

Lilia M. Corona, District Manager

Chris Elliott, District Engineer

Stephanie L. Seregin, Board Secretary

J. Daniel Adams, Consultant District Counsel

## Table of Contents

Introduction .....	3
Process .....	5
District Mission Statement .....	6
Vision Statement .....	7
Core Values .....	8
Effective Utility Management Areas and Goals. ....	9
Summary Workplan. ....	12
Goal 1.1 Plant environmental regulatory compliance. ....	12
Goal 1.2 Collection System environmental regulatory compliance. ....	14
Goal 2.1 Develop a long-term financial plan that fully funds Operations. ....	16
Goal 2.2 Investigate available grant funding opportunities. ....	18
Goal 3.1 Continue to develop a Continuous Improvement Culture. ....	19
Goal 3.2 Implement standard Operating Procedures (SOPs) .....	20
Strategic Plan Maintenance .....	23

<b>Acronym Glossary</b>			
BACWA	Bay Area Clean Water Agencies	MVSD	Mt. View Sanitary District
CASA	California Association of Sanitary Agencies	NELAC	National Environmental Laboratory Accreditation Conference
CIP	Capital Improvement Plan	NPDES	National Pollution Discharge Elimination System
CWEA	California Water Environmental Association	RWQCB	Regional Water Quality Control Board
ELAP	California Environmental Laboratory Accreditation Program	SOP	Standard Operating Procedure
EPA	US Environmental Protection Agency	SRF	State Revolving Fund
EUM	Effective Utility Management	SSO	Sanitary Sewer Overflow
GHG	Green House Gasses	SWOT	Strengths, Weaknesses, Opportunities, and Threats
GIS	Geographic Information System	SWRCB	State Water Resources Control Board
MMS	Mobile Management System	TNI	The NELAC Institute

## Introduction

The Mt. View Sanitary District (District) has used planning as a formula for success for over 85 years. The District has done an exemplary job of managing its core mission while enjoying excellent relationships with both rate-payers and regulators. The District is widely recognized for its 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.

A strategic planning effort seeks to serve as a framework for decision-making in the moderate term (0 to 15 years). It provides a strategic basis for detailed planning. As a top-level planning document, a strategic plan begins by dovetailing with current activities, details actions and activities to support objectives in the 1-to-15 year timeframe, and projects by establishing clear connections with a long-term infrastructure plan. It seeks to create a clear, schedule-loaded roadmap of actions and activities into the future in five-year increments. This plan provides goals and deliverables through the end of 2024. A strategic plan should be visionary, conceptual, and directional. It should identify and forecast areas where attention is now or will be needed, followed by realistic, attainable goals for future actions. A strategic plan also seeks to ensure that actions will be taken in the proper sequence and at the appropriate time to protect the District. These plans often take the form of actions to be conducted annually, or of planning efforts to be performed in the future to identify specific key need areas.

This plan, as a top-level document, looks into the future and, given the mission of the District, identifies actions, activities, and planning efforts needed for continued success in operations and management. It works to build on strengths, address weaknesses, utilize opportunities, and mitigates threats.

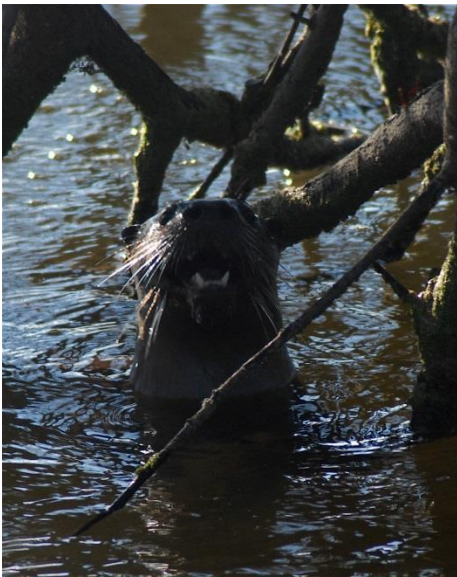
The following assumptions have been made in conducting this planning effort:

- Collection, treatment, and discharge regulations are likely to evolve and the District must be proactive and flexible enough to spot and respond to these changes and to be able to continue to meet all permit requirements.
- Associations with partner agencies and stakeholders are valuable, yet can change.
- Technology developments can present unanticipated process-related opportunities.
- Certain environmentally related changes and challenges can significantly affect District operations.
- The management of all District Assets (Finances, People, and Facilities) is important to the District.
- Changes in Federal, State, and local laws and land use policies can have significant effects on District operations and opportunities.
- Any employee of the District can leave the organization at any time.
- The District will continue to provide a greater scope of services and will seek grant funding opportunities for these services (education programs, marsh programs, providing wildlife habitat).
- The District will reinforce pools of qualified personnel by partnering regionally and locally.
- Demand for and cost to provide environmental education will continue to increase.
- The District will maintain affordable user rates
- The District will continue to identify and capitalize on available opportunities.

Attempts have been made in this plan to anticipate, prepare, and position the District for these and other potential assumptions. The plan is organized so that specific strategic actions are derived from the overall mission of the District. Strategic goals are actions and activities that serve to assure that elements are well-planned and forecasted for resource identification and allocation in the future.

## Process

Beginning in 2003, the Board of Directors initiated strategic planning by engaging a facilitating consultant to coordinate the strategic planning process. A final strategic plan was produced and guided the District for 6 years with one update in 2008. This current Strategic Planning effort used a different process that incorporated three independent planning sessions to brainstorm the District's Strengths, Weaknesses, Opportunities, and Threats (SWOT). The first level



SWOT analysis consisted of the District's Focus group (District Manager, District Engineer, Administrative Services Manager, Environmental Services Manager, Operations Manager, and District Legal Counsel). The second level of SWOT analysis occurred with all District staff in attendance. The third level of SWOT analysis took place with the Board of Directors. All of the issues generated in these sessions were consolidated and prioritized and preliminary goals were developed to address

each issue. The resulting preliminary goals were presented to the Board of Directors for consideration for further development and inclusion in this Strategic Plan. The Strategic Plan was updated using a similar process in 2011, 2014, and 2018 (Board approval was not requested by the District Manager).

For this Strategic Plan, staff recognized the need to provide more focused attention to each goal and objective to improve the quality of the outcome and benefit to the District. For this reason, fewer goals and activities supporting those goals have been identified.

Effective Utility Management<sup>1</sup> (EUM) materials were used to further engage District staff in the strategic planning process aimed at increasing organizational buy-in to the District's Strategic Plan and producing a more successful, dynamic, and adaptable Strategic Plan. This additional planning effort consisted of gathering input from staff, stimulating support for change, and establishing staff support and participation in the implementation of the Strategic Plan. This planning session included individual staff assessments and prioritization of EUM key management areas. On February 11, 2021, the Board of Directors prioritized the EUM areas as follows:

1. Product Quality (PQ)
2. Financial Viability (FV)
3. Employee and Leadership Development (ED)
4. Enterprise Resiliency (ER)
5. Infrastructure Strategy and Performance (IS)
6. Customer Satisfaction (CS)
7. Stakeholder Understanding and Support (SS)
8. Operational Optimization (OO)
9. Water Resource Sustainability (WS)
10. Community Sustainability (SU)

### ***MISSION Statement of the Mt. View Sanitary District***

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

---

<sup>1</sup> <https://www.awwa.org/resources-tools/water-and-wastewater-utility-management/effective-utility-management.aspx> *Effective Utility Management A Primer for Water and Wastewater Utilities*  
[https://www.epa.gov/sites/production/files/2017-01/documents/eum\\_primer\\_final\\_508-january2017.pdf](https://www.epa.gov/sites/production/files/2017-01/documents/eum_primer_final_508-january2017.pdf)  
*Moving Toward Sustainability: Sustainable and Effective Practices for Creating Your Own Water Utility Roadmap*  
[https://www.epa.gov/sites/production/files/2016-01/documents/sustainable-utilities-roadmap-12-10-14\\_508.pdf](https://www.epa.gov/sites/production/files/2016-01/documents/sustainable-utilities-roadmap-12-10-14_508.pdf)

## Vision Statement

A Vision Statement is a Board-crafted and adopted statement of the ideal future condition. It asks the Board to project what it would like to say about the District at the term of the strategic plan, in this case, 5 years. It outlines, at the highest level, the key changes that must be achieved by the Strategic Plan. The Vision Statement is adopted by the Board of Directors. The Vision creates and drives strategy and tactics identified elsewhere in the Strategic Plan. The bullets below represent those conditions that the Board would like to achieve in that timeframe, thus their collective VISION.

### **VISION Statement of the Mt. View Sanitary District**

- **Maintain regulatory compliance.**
- **Proactively manage infrastructure while continuing our commitment to protect the public health and the environment.**
- **Provide high values by managing long-term costs to protect future affordability.**
- **Enhance our customer service, public education, information, and outreach.**
- **Enhance the use of solid waste.**
- **Assure an adaptable organization by sustaining a well-performing, highly qualified, team-based, versatile, motivated, innovative, and responsive workforce.**



## **Core Values**

Adopted by the Board of Directors, the Core Values are the guiding principles that dictate behavior and actions for the District. They shape the District's conduct and project the culture and belief within which it will fulfill the Mission. These values serve as reference points and are used every time decisions are made as a District. The Core Values are reviewed annually but are intended to remain relatively constant over the long term.

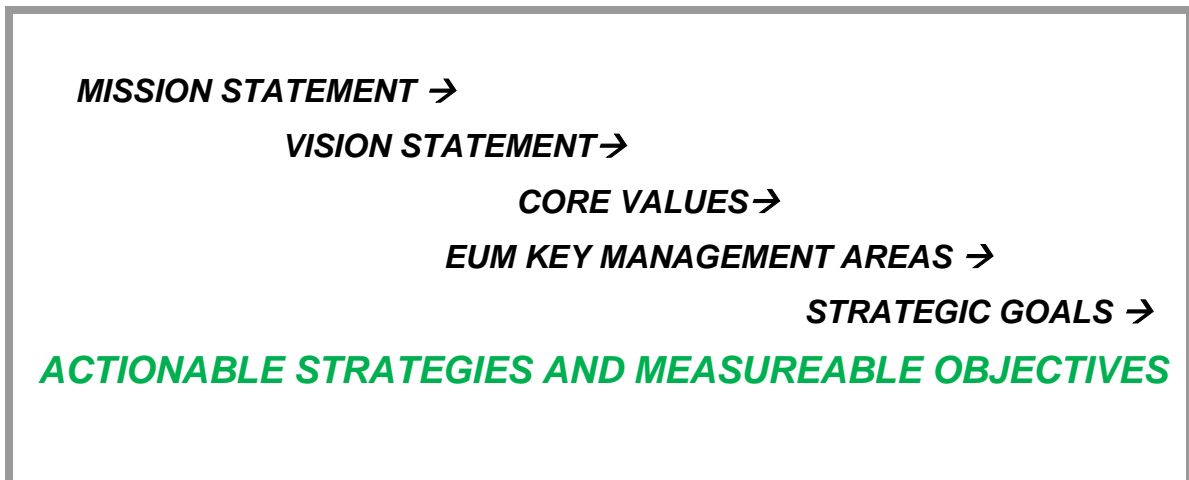
### **CORE VALUES of the Mt. View Sanitary District**

- ***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***

## Effective Utility Management and Goals

The Effective Utility Management's (EUM) key management areas focus the attention of the Board of Directors and the District's operations, planning, and management on our highest priorities needing improvement. The EUM key management areas are supported by the District's philosophical approach through linkage to the core values and mission statement of the District. They are linked to action in the form of strategic goals, actionable strategies, and measurable objectives that serve to implement the plan.

**Linkages** – the following graphic shows how Strategic Goals and resultant actions are linked back to the Core Values and Mission of the District.



## **Effective Utility Management (EUM) Areas**

EUM was developed by the U.S. EPA along with a coalition of water sector associations in 2008. The EUM areas are listed in the order of priority identified by the District Board of Directors at the February 11, 2021, Regular Board Meeting. The ten areas are framed as outcomes (or goals).

### **1. Product Quality:**

- a. Produce treated effluent, and process residuals/recovered resources:
  - i. Clean and safe water
  - ii. In full compliance with regulatory and reliability requirements
  - iii. Consistent with customer, public health, and ecological needs
  - iv. Consistent with local economic development and business needs and opportunities
- b. Effective collections system free from sanitary sewer overflows

### **2. Financial Viability:**

- a. Ensure revenues adequate to recover costs, fund timely maintenance, repair, and replacement of assets, and provide for reserves
- b. Establish predictable rates, consistent with community expectations and acceptability – discuss rate requirements with customers, board members, and other key stakeholders
- c. Provide responsible proactive review and reporting of the utilities financial position

### **3. Employee and Leadership Development:**

- a. Enable a workforce that is competent, motivated, adaptive, and safe working
- b. Ensure employee institutional knowledge is retained and improved on over time
- c. Create opportunities for professional and leadership development

### **4. Enterprise Resiliency:**

- a. Identify threats to the system (legal, financial, non-compliance, environmental, safety, security, and natural disaster) – conduct all-hazards vulnerability assessment
- b. Establish acceptable risk levels that support system reliability goals
- c. Identify how you will manage risks and plan response actions – prepare an all-hazards emergency response plan

### **5. Infrastructure Strategy and Performance:**

- a. Understand costs and condition for each system component
- b. Understand operational performance factors (e.g., capacity)
- c. Plan for system component repair and replacement over the long-term at the lowest possible cost

- d. Coordinate asset repair, rehabilitation, and replacement within the community to minimize disruptions and other negative consequence
- 6. Customer Service:**
- a. Know what your customers expect in service, water quality, and rates
  - b. Set goals to meet these expectations
  - c. Help your customers understand the value of water
  - d. Develop a way to gather feedback from your customers, review the feedback, and then act on it
- 7. Stakeholder Understanding & Support:**
- a. Create understanding and support from oversight bodies, community and watershed interests, and regulatory bodies:
    - i. Service levels
    - ii. Rate structures
    - iii. Operating budgets
    - iv. Capital improvement programs
    - v. Risk management decisions
  - b. Actively engage with the community and customers:
    - i. Understand needs and interests
    - ii. Promote the value of clean and safe water
- 8. Operational Optimization:**
- a. Ensure ongoing, timely, cost-effective, and reliable performance improvements in all facets of operations (i.e., continual improvement culture)
  - b. Minimize resource use, loss, and impacts from day-to-day operations (e.g., energy and chemical use, water loss)
  - c. Maintain awareness of information and operational technology developments to anticipate and support timely adoption of improvements
- 9. Water Resource Sustainability:**
- a. Ensure water availability consistent with current and future customer needs:
  - b. Long-term resource supply and demand analysis
  - c. Conservation
  - d. Public education
  - e. Understand the system role in water availability
  - f. Manage operations to provide for long-term aquifer and surface water sustainability and replenishment
- 10. Community Sustainability:**
- a. Be active in your community
    - i. Be aware of, or participate in, discussions of community and economic development

- ii. Get to know local business needs and be aware of opportunities for new residential or business customers
- b. Align Utility Goals: to be attentive to the impacts utility decisions will have on current and future community and watershed health
- c. Align Utility Goals: to promote community economic vitality and overall improvement

## Summary Work Plan

### **Primary EUM Attribute: Product Quality (PQ)**

**Secondary attributes: Infrastructure Strategy and Performance (IS), Stakeholder Understanding and Support (SS), Community Sustainability (SU)**

**Strategic Plan Goal 1.1 Plant environmental regulatory compliance  
Objective: Sustainable 100% regulatory compliance for the treatment plant**

Product Quality has been identified by the Board of Directors as the District's highest priority and is a cornerstone of environmental stewardship. Plant treatment performance has decreased since late 2015 from the time several significant changes took place including the Influent Pump Station coming online, the Primary Digester Cleaning and valve replacement, and the institution of plant valve exercising. A request for proposals for a Treatment Plant Performance Study has been issued to four Engineering firms. The District has previously enjoyed ongoing treatment plant compliance and a good relationship with the Regional Water Quality Control Board (RWQCB). It is prudent to prioritize getting back to pre-2015 treatment levels as quickly as possible. The District is currently negotiating the National Pollution Discharge Elimination System (NPDES) permit for the treatment plant. The anticipated effective date of the reissued NPDES permit is July 1, 2022.

Year	Activities	Deliverable
FY21-22	<ul style="list-style-type: none"> <li>• Award Treatment Plant Performance Study</li> <li>• Complete Treatment Plant Performance Study</li> <li>• Complete recommended corrective actions (may go beyond FY21-22)</li> <li>• Continued participation in BACWA, CASA, and CWEA</li> <li>• Engage with regulatory agencies including RWQCB, SWRCB, and EPA</li> <li>• Document NPDES changes and train Laboratory and Operations staff.</li> <li>• Develop performance measurements, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Treatment Plant Performance Study report</li> <li>• Report NPDES changes to the Board</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Annual treatment plant infrastructure condition assessment and capital improvement plan report</li> </ul>
FY22-23	<ul style="list-style-type: none"> <li>• Establish an internal Air/Climate Change Committee</li> <li>• Attend the BACWA Air Committee and the CASA Air Quality, Climate Change and Energy Workgroup, and the CASA Biosolids group</li> <li>• Engage with regulatory agencies including Bay Area Air Quality Management District and California Air Resources Board</li> <li>• Track pending legislation and develop a schedule of upcoming air and climate change regulations as they will apply to the District</li> <li>• Develop internal Green House Gas (GHG) emission inventory</li> <li>• Identify and study infrastructure requirements to comply with applicable regulations</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Report on new regulations, effective implementation dates, and new District requirements</li> <li>• Annual air and climate change capital improvement plan updates</li> </ul>

FY22-23 Cont.	<ul style="list-style-type: none"> <li>• Develop performance measurements as they become relevant, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	
FY23-24	<ul style="list-style-type: none"> <li>• Decide about the District’s ability to comply with the Environmental Laboratory Accreditation Program’s (ELAP) new The NELAC Institute (TNI) regulations. This determination is based on available resources for the added burden the new regulations will impose</li> <li>• Develop a formal Asset Management Plan and Resiliency Plans as required by the reissued NPDES permit</li> <li>• More to be determined based on the outcome of 2021-2023 activity status and results.</li> <li>• Develop performance measurements as they become relevant, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Report on new regulations, effective implementation dates, and new District requirements</li> <li>• Present Asset Management Plan and Resiliency Plans to the Board</li> </ul>

**Strategic Plan Goal 1.2 Collection System environmental regulatory compliance**  
**Objective: Sustainable 100% regulatory compliance for the Collection System: ZERO sanitary sewer overflows (SSOs)**

Protection of public health and the environment is an important part of the District’s Mission Statement. A sanitary sewer overflow (SSO) is any overflow, spill, release, discharge, or diversion of untreated or partially treated wastewater from a sanitary sewer system. SSOs pollute surface and ground waters, threaten public health, adversely affect aquatic life, and impair the recreational use and

aesthetic enjoyment of surface waters. This goal and the related activities are directed at preventing and reducing the District's number of SSOs.

Year	Activities	Deliverable
FY21-22	<ul style="list-style-type: none"> <li>• Condition assessment through Pipeline Cleaning &amp; Televising / Condition Assessment Program (five-year cycle)</li> <li>• Cleaning and maintenance               <ul style="list-style-type: none"> <li>○ Follow the Sanitary Sewer System Waste Discharge Requirements (WDR) re-issuance and implement changes to the SSMP and SSO Response Plan as needed</li> <li>○ Continue to collect and add system information to the GIS/MMS system for increased institutional knowledge and record-keeping</li> <li>○ Increase CWEA Collection System Maintenance Certification levels</li> <li>○ Continued participation in BACWA Collection System Committee and CWEA</li> </ul> </li> <li>• Develop a targeted public outreach plan for:               <ul style="list-style-type: none"> <li>○ FOG and root blockages</li> <li>○ Private lateral maintenance</li> </ul> </li> <li>• Engage with regulatory agencies including RWQCB, SWRCB, and EPA</li> <li>• Develop performance measurements, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Annual report for Pipeline Cleaning &amp; Televising / Condition Assessment Program</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> </ul>



FY22-23	<ul style="list-style-type: none"> <li>• Develop Private Lateral Program (PLP)</li> <li>• Outline funding and resources needed for the program implementation (the fees associated with the program should fully fund the program)</li> <li>• Update District Code and Ordinance</li> <li>• Develop Public outreach plan for the education of public and real estate professionals</li> <li>• Present PLP to the Board for approval</li> <li>• Develop standard operating procedures for program execution</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Private Lateral Program to Board for approval</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>•</li> </ul>
FY23-24	To be identified based on the outcome of 2021-2023 activity status and results.	Ongoing as outlined for FY21-23

## 2. Financial Viability (FV)

**Strategic Plan Goal 2.1 Develop a long-term financial plan that fully funds Operations & Maintenance (O&M) and the Capital Improvement Plan (CIP)**

**Objective: Establish predictable rates that are adequate to fund 10-years of projected O&M and CIP needs and are affordable to customers**

An increasing regulatory burden along with aging infrastructure and a small rate base makes financial planning essential to the District’s success. These two financial goals 2.1 and 2.2 are aimed at effectively balancing long-term debt and understanding opportunities for diversifying revenue and raising funds for capital investment.

Year	Activities	Deliverable
FY21-22	<ul style="list-style-type: none"> <li>• Quarterly Cash Flow analysis reports to the Board</li> <li>• Recommend 10-year CIP expenditure goals to the Board</li> <li>• Develop 10-year Financial Plan</li> <li>• Develop performance measurements, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• 10-year Financial Plan</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> </ul>
FY22-23	<ul style="list-style-type: none"> <li>• Quarterly Cash Flow analysis reports to the Board</li> <li>• Annual Financial Plan report</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Annual Financial Plan report</li> </ul>
FY23-24	To be identified based on the outcome of 2021-2023 activity status and results.	Ongoing as outlined for FY21-23

**Strategic Plan Goal 2.2 Investigate available grant funding opportunities and provide resources for application and management of grants for the District's Capital Improvement Plan**

**Objective: Increase grant funding (and Federally and State subsidized loans) for CIP**

<b>Year</b>	<b>Activities</b>	<b>Deliverable</b>
FY21-22	<ul style="list-style-type: none"> <li>• Request proposals from consultants with grant expertise</li> <li>• Award contract for a consultant to identify short and long-term grant opportunities and the recommended approach to pursue available grants, making sure to take advantage of grants for State determined Disadvantaged Communities</li> <li>• Develop a long-term project-specific plan for grant applications</li> <li>• Contract for assistance with grant applications</li> <li>• Include investigation of grant opportunities in the scope of CIP project engineering study and design contracts as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Annual grant report</li> </ul>
FY22-23	<ul style="list-style-type: none"> <li>• Request proposals from consultants and award contract for a consultant to investigate and decide on the application for State Revolving Fund (SRF) and Water Infrastructure Finance and Innovation Act loans</li> <li>• Develop performance measurements for grant application and government-subsidized loans, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Annual grant report</li> </ul>
FY23-24	To be identified based on the outcome of 2021-2023 activity status and results.	Ongoing as outlined for FY21-23

**Primary EUM Attribute: 3. Employee and Leadership Development (ED)**

**Secondary attribute: Operational Optimization (OO),  
Objective: Increase grant funding (and Federally and State subsidized loans) for CIP**

**Strategic Plan Goal 3.1 Continue to develop a Continuous Improvement Culture**

**Objective: Create and sustain a culture of Continuous Improvement**

Performance measurement is critical to improvement efforts and focuses attention on key issues, clarifies expectations, facilitates decision making, supports learning, and establishes accountability. A limited number of performance metrics relative to identified activities will be selected carefully with staff input.

<b>Year</b>	<b>Activities</b>	<b>Deliverable</b>
FY21-22	<ul style="list-style-type: none"> <li>• Use email and meetings to keep employees informed of the Strategic Plan progress, provide strategic vision, solicit input, encourage buy-in, projects, initiatives, and District developments.               <ul style="list-style-type: none"> <li>○ Bimonthly All-Hands and/or Lab/Ops meetings</li> <li>○ Weekly Management team Meetings</li> </ul> </li> <li>• Recognize and celebrate employee achievements               <ul style="list-style-type: none"> <li>○ Continue annual Employee Appreciation Event</li> <li>○ Begin staff meetings with success stories</li> <li>○ Ask employees for examples of ways they have demonstrated “lean behaviors,” reduced waste, or made a change</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Report on annual employee engagement survey</li> </ul>

FY21-22 Cont.	<ul style="list-style-type: none"> <li>Engage employees in collaborative planning and decision-making</li> <li>Develop performance measurements, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	
FY22-23	<ul style="list-style-type: none"> <li>Continue previous fiscal year activities</li> <li>Develop and launch an internal Human Resources website to support employees needs</li> <li>Investigate available continuous improvement software that can track, facilitate and streamline cultural development; implement as appropriate</li> </ul>	<ul style="list-style-type: none"> <li>Manager monthly Board updates</li> <li>Report Key Metrics to be used</li> <li>Quarterly metrics performance reports</li> </ul>
FY23-24	To be identified based on the outcome of 2021-2023 activity status and results.	Ongoing as outlined for FY21-23

**Strategic Plan Goal 3.2 Implement standard Operating Procedures (SOPs) for all appropriate employee activities**

**Objective: Retain and develop institutional knowledge and provide useful guidance and training for employees**

This goal ensures that employee institutional knowledge is retained, transferred, and improved upon over time. Knowledge management is critical to ensuring reliable operations, effective response to employee turnover and unexpected employee absences, and flexibility to evolving technologies.

Year	Activities	Deliverable
FY21-22	<ul style="list-style-type: none"> <li>• Maintain a list of SOPs needed for each department</li> <li>• Develop 16 predetermined Financial/Administrative SOPs</li> <li>• Develop a standard format for Operations SOPs and develop/revise 8 Operations SOPs</li> <li>• Review and revise all Laboratory SOPs annually (currently 18)</li> <li>• Develop Engineering SOPs as needed</li> <li>• Provide SOP training to employees</li> <li>• Review and revise all District Policies as needed: <ul style="list-style-type: none"> <li>○ Revise and present District Policy 2025-Performance Evaluation to the Board for approval</li> <li>○ Present an Outsourcing Policy to the Board for approval</li> </ul> </li> <li>• Develop Performance Development Plans for all employees (incorporate into the annual performance evaluation process) <ul style="list-style-type: none"> <li>○ Encourage employees to take advantage of development training, increase certifications as appropriate, and continuing education</li> </ul> </li> <li>• Develop a Policy Review/Update schedule. Continue to bring revised policies to the Board for approval. Develop performance measurements, identify staff responsible for collecting data and how it will be tracked and reported.</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates p</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Annual Position and Succession Review</li> <li>• Present revised District Policy 2025-Performance Evaluation to the Board for approval</li> <li>• Present Outsourcing Policy to the Board for approval</li> <li>• Revised Policies to the Board for approval.</li> </ul>

FY22-23	<ul style="list-style-type: none"> <li>• Maintain an inventory of SOPs for each department</li> <li>• Develop 8 Financial/ Administrative SOPs</li> <li>• Develop/revise 12 Operations SOPs</li> <li>• Develop, review and revise 32 Laboratory SOPS annually</li> <li>• Provide SOP training to employees</li> <li>• Continue to review and revise all District Policies as needed</li> <li>• Develop position-specific training plans</li> </ul>	<ul style="list-style-type: none"> <li>• Manager monthly Board updates</li> <li>• Report Key Metrics to be used</li> <li>• Quarterly metrics performance reports</li> <li>• Annual Position and Succession Review</li> <li>• Present the Purchasing Manual to the Board for review</li> </ul>
FY23-24	To be identified based on the outcome of 2021-2023 activity status and results.	Ongoing as outlined for FY21-23

## **Strategic Plan Maintenance**

Board Policy and Procedure B-100-20-2 – Annual Study Session on Strategic Plan prescribes that an annual study session will take place in February each year or other such time as mutually agreed upon to review the continued relevancy of the District Strategic Plan and the progress made during the prior year. The Annual Study Session will focus on the following objectives:

1. For the Board to receive a detailed status report from the District Manager on the progress made in achieving the current year goals and objectives.
2. To conduct the required annual review of the strategic plan and confirm its continued relevance for the following year.
3. To adopt goals and objectives for the following year.
4. To address any matters of concern to the Board.

Reviews of this plan will be conducted annually with updates of the plan being carried out generally every three to five years. Reviews will be conducted internally by staff and presented to the Board when updated strategies are recommended. The Board will receive from the District Manager an annual status report on the progress of each identified strategic goal at the Annual Study Session. Updates will involve a comprehensive overview of the existing plan with a 15-year planning horizon. Updates will result in and be documented by an updated plan with new and revised elements as needed.