

FY 2017/18
ANNUAL REPORT
SPMUD STRATEGIC PLAN
2018/2022

September 6, 2018





| Objectives | | DEPT RESP. | July-Sept 2017 | Oct-Dec 2017 | Jan-Mar 2018 | Apr-June 2018 |
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| I. Customer Service: | | | | | | |
| Goal 1.1: Engage Customers and stakeholders and promote Public Participation to determine expectations and deliver excellent customer service | | | | | | |
| Goal 1.1 a | Implement Customer and Stakeholder Feedback Form and Satisfaction survey | ASD | | | | |
| Goal 1.1 b | Add a "Forum" component to the District Website | ASD | | | | |
| Goal 1.1 c | Create an interactive learning tool to the website (FOG, roots, building sewer, responsibility, cleanouts, fixtures...) | TSD | | | | |
| Goal 1.1 d | Investigate an interactive customer-specific tool to the website (billing) | ASD | | | | |
| Goal 1.1 e | Investigate an interactive stakeholder tool to be added to the website (GIS) | TSD | | | | |
| Goal 1.1 f | Improve web payments site and customer access to their accounts | ASD | | | | |
| Goal 1.1 g | Focus on building relationships and engage in two-way communication with business partners, title companies, city & county departments as it relates to customer accounts. | ASD | | | | |
| Goal 1.1 h | Develop communication protocol with partner agencies – city/town/county portal | TSD | | | | |
| Goal 1.2: Improve Communications | | | | | | |
| Goal 1.2 a | Implement Project Outreach Plan | TSD | | | | |
| Goal 1.2 b | Publish two newsletters annually | ASD | | | | |
| Goal 1.2 c | Prepare routine press releases of District activities | ASD | | | | |
| Goal 1.2 d | Develop comprehensive content for door hangar | TSD | | | | |
| Goal 1.2 e | Provide employee training (common voice) regarding communication with media/stakeholder/customers. | ASD | | | | |
| Goal 1.3: Transparency with all District Activities | | | | | | |
| Goal 1.3 a | Renew Transparency Certification | ASD | | | | |
| Goal 1.3 b | Obtain GFOA Award for Financial Reporting | ASD | | | | |
| Goal 1.3 c | Post performance measures and annual work plan goals on website | TSD | | | | |
| Goal 1.3 d | Post link to State Waterboards SSO program | FSD | | | | |
| Goal 1.3 e | Encourage clear communications with employees to ensure they understand the Districts values and goals. | ASD | | | | |

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| II. Sustainability | | | | | | |
| Goal 2.1: Develop and implement strategies to conserve energy and use it more efficiently | | | | | | |
| Goal 2.1 a | Perform Energy Audits | FSD | | | | |
| Goal 2.1 b | Solar at CY Facilities | FSD | | | | |
| Goal 2.1 c | Explore back-up generation of power for District facilities | FSD | | | | |
| Goal 2.2: Implement efforts to ensure water efficiency in District buildings and Operations | | | | | | |
| Goal 2.2 a | Perform Water Use Audit | FSD | | | | |
| Goal 2.2 b | Evaluate Reverse Osmosis Water Treatment Plant for efficiency and continued use | FSD | | | | |
| Goal 2.2 c | Assess and reduce water use and attributed costs | FSD | | | | |
| Goal 2.2 d | Irrigate CY grounds with well water | FSD | | | | |
| Goal 2.2 e | Change CY landscape to drought-resistant, reduce amount of grass | FSD | | | | |
| Goal 2.2 f | Supplement hydro-cleaning activities with well water | FSD | | | | |
| Goal 2.2 g | Clean only pipes that need to be cleaned | FSD | | | | |
| Goal 2.3: Select, Implement and Integrate strategies to use renewable energy, low carbon fuels, and investigate options for feasibility or alternative fuel efficient vehicles | | | | | | |
| Goal 2.3 a | Perform Fuel Study | FSD | | | | |
| Goal 2.3 b | Evaluate Fuel Alternatives | FSD | | | | |
| Goal 2.3 c | Hybrid Vehicles | FSD | | | | |
| Goal 2.4: Embrace Green building policies in the design and operation of District Facilities and enhance sustainable building and construction practices | | | | | | |
| Goal 2.4 a | Adopt and Implement Low-Impact-Development Standards | TSD | | | | |
| Goal 2.4 b | Evaluate use of permeable pavements as a long term substitute for asphalt paving | TSD | | | | |
| Goal 2.4 c | Investigate Institute for Sustainable Infrastructure (ISI) Envision process | TSD | | | | |
| Goal 2.5: Implement a comprehensive waste reduction and recycling program | | | | | | |
| Goal 2.5 a | Enhance current recycling efforts at all District facilities. | ASD | | | | |
| Goal 2.5 b | Establish recycling goals. | ASD | | | | |
| Goal 2.5 c | Continue to pursue a paperless work environment. | ASD | | | | |
| Goal 2.5 d | Procure postconsumer recycled content products. | ASD | | | | |
| Goal 2.5 e | Promote source reduction of office supplies. | ASD | | | | |
| Goal 2.5 f | Enhance used cooking oil pick up program | TSD | | | | |
| Goal 2.5 g | Enhance e-waste recycling program (household batteries) | FSD | | | | |
| Goal 2.5 h | Enhance website information regarding oil recycling | TSD | | | | |
| Goal 2.6: Provide performance measures and metrics to compare to Best Management Practices. | | | | | | |
| Goal 2.6 a | Develop performance measures intended to evaluate sustainability efforts. | TSD | | | | |

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| III. Infrastructure Management and Capital Improvement | | | | | | |
| Goal 3.1: Plan all projects to ensure adherence to District standards and ordinances | | | | | | |
| Goal 3.1 a | Create a Quality Control process for SPMUD projects | TSD | | | | |
| Goal 3.1 b | Create a Quality Control process for Development projects | TSD | | | | |
| Goal 3.1 c | Create a Quality Control process for County/City/Town projects | TSD | | | | |
| Goal 3.2: Provide construction management to ensure the best possible facilities for the District | | | | | | |
| Goal 3.2 a | Evaluate work force to ensure appropriate staffing to achieve this goal | TSD | | | | |
| Goal 3.2 b | Develop a Construction Management Program for District projects | TSD | | | | |
| Goal 3.3: Develop and implement a Tactical Asset Management Program | | | | | | |
| Goal 3.3 a | Evaluate current asset inventories and management practices | TSD | | | | |
| Goal 3.3 b | Develop condition assessment/rehab replace program | TSD | | | | |
| Goal 3.3 c | Prioritize CIP and determine long-term needs: a. HRD, HFLS b. Lift Station Abandonment Schedule | TSD | | | | |
| Goal 3.4: Provide performance measures and metrics to compare to Best Management Practices | | | | | | |
| Goal 3.4 | Provide Performance Measures and metrics to compare to Best Management Practices | TSD | | | | |

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| IV. Sewer System Maintenance and Watershed Management | | | | | | |
| Goal 4.1: Maintain Compliance with pertinent regulations | | | | | | |
| Goal 4.1 a | Use consultants to establish a regulatory compliance program | FSD | | | | |
| Goal 4.1 b | Attend/participate in industry workshops and conferences | FSD | | | | |
| Goal 4.1 c | Participate in the State Water Boards SSO reduction programs | FSD | | | | |
| Goal 4.1 d | Continuously evaluate the District's OERP | FSD | | | | |
| Goal 4.1 e | Investigate Regional Partners Regulatory Compliance Program | TSD | | | | |
| Goal 4.2: Prevent and Mitigate Sewer System Overflows (SSOs) using the most efficient and effective maintenance and operational methods and procedures. | | | | | | |
| Goal 4.2 a | CCTV the mainline system in a four-year interval | FSD | | | | |
| Goal 4.2 b | Perform condition assessment of 1600 laterals/year | FSD | | | | |
| Goal 4.2 c | Clean all lines identified by CCTV operations to be cleaned | FSD | | | | |
| Goal 4.2 d | Eliminate repeat customer service calls | FSD | | | | |
| Goal 4.2 e | Ensure cleanouts on all District owned Lower Laterals | FSD | | | | |
| Goal 4.3: Implement the FSE FOG permit system. | | | | | | |
| Goal 4.3 a | Permit all FSE's | TSD | | | | |
| Goal 4.3 b | Inspect all FSE's on an appropriate schedule | TSD | | | | |
| Goal 4.4: Provide performance measures and metrics to compare to Best Management Practices | | | | | | |
| Goal 4.4 | Provide Performance Measures and metrics to compare to Best Management Practices | fsd | | | | |

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| V. Financial Stability | | | | | | |
| Goal 5.1: Maintain Wastewater rates sufficient to meet financial needs, operational demands, regulatory requirements and customer expectations | | | | | | |
| Goal 5.1 a | 5- Year Financial plan updates | ASD | | | | |
| Goal 5.1 b | Establish predictable rates | ASD | | | | |
| Goal 5.1 c | Recover sufficient revenues to maintain wastewater operations, capital and regulatory requirements. | ASD | | | | |
| Goal 5.2: Explore and evaluate investment and business practice alternatives | | | | | | |
| Goal 5.2 a | Periodically review Board Investment and Reserve policies and permitted investment allocations. | ASD | | | | |
| Goal 5.3: Maintain financial responsibility by ensuring allocated funding sources are adequate to meet expenses; and that available funds and resources are managed efficiently. | | | | | | |
| Goal 5.3 a | Evaluate investments and monitor liquidity needs. | ASD | | | | |
| Goal 5.4: Prepare balanced annual budgets; conduct acceptable audits | | | | | | |
| Goal 5.4 a | Obtain GFOA Award for Financial Reporting | ASD | | | | |
| Goal 5.4 b | Conduct Annual Audit | ASD | | | | |
| Goal 5.5: Provide qualifying low income program rates for eligible customers | | | | | | |
| Goal 5.5 a | Investigate the mplementation of a Lifeline Low income Rate Assistance Program. | ASD | | | | |
| Goal 5.6: Provide routine reports on Financial Stability | | | | | | |
| Goal 5.6 a | Monthly and annual reporting of investments and expenditures. | ASD | | | | |
| Goal 5.6 b | Annual report to the Board from the investment team. | ASD | | | | |
| Goal 5.7: Provide performance measures and metrics to compare to Best Management Practices | | | | | | |
| Goal 5.7: | Provide Performance Measures and metrics to compare to Best Management Practices | FSD | | | | |

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| VI. Workforce Planning and Employee Development | | | | | | |
| Goal 6.1: Enhance Professional Development and Training Programs to invest in District employees | | | | | | |
| Goal 6.1 a | Bring experts to the District for in-house training (Departmental specific) | FSD | | | | |
| Goal 6.1 b | Field staff attend CWEA training | FSD | | | | |
| Goal 6.1 c | Investigate a regional partners training program | FSD | | | | |
| Goal 6.1 d | Enhanced incentives for professional development | FSD | | | | |
| Goal 6.1 e | Evaluate core/non-core duties for performance by contracted services/consultants | TSD | | | | |
| Goal 6.2: Develop and implement competitive and Incentive-based Compensation Programs | | | | | | |
| Goal 6.2 a | Implement Performance Based Compensation Program (West Bay Model) | FSD | | | | |
| Goal 6.2 b | Implement Performance Based Wellness Program | FSD | | | | |
| Goal 6.3: Continuously Annually evaluate the organizational staffing needs for the District | | | | | | |
| Goal 6.3 a | Investigate staffing triggers | FSD | | | | |
| Goal 6.3 b | Investigate the concept of staffing models and determine cost benefit analysis | TSD | | | | |
| Goal 6.3 c | Use of Consultants; evaluate outsourcing of non-core functions | TSD | | | | |
| Goal 6.3 d | Safety Regulatory Compliance Officer | FSD | | | | |
| Goal 6.3 e | Develop Performance Standards by Job Classification | FSD | | | | |
| Goal 6.4: Provide performance measures and metrics to compare to Industry Best Management Practices | | | | | | |
| Goal 6.4: | Provide Performance Measures and metrics to compare to Best Management Practices | FSD | | | | |

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| VII. Operational Optimization | | | | | | |
| Goal 7.1: Information Technology Improve various data management and information systems | | | | | | |
| Goal 7.1 a | Continuously evaluate available technology to ensure efficient programs and processes | TSD | | | | |
| Goal 7.1 b | Implement technology based upon District needs | TSD | | | | |
| Goal 7.2 Develop and Implement Records Management Plan | | | | | | |
| Goal 7.2 a | a) Implement Records Retention Policy | ASD | | | | |
| Goal 7.2 b | a) Inventory Old Agreements, Establish intention and history , document (use of GIS) and train staff accordingly (refund agreements, assessment districts, pre-paid agreements/credits) | ASD | | | | |
| Goal 7.2 c | a) Manage Archiving Systems | ASD | | | | |
| Goal 7.2 d | Develop standard documentation procedures/electronic filing protocols, file naming etc. | ASD | | | | |
| Goal 7.3 Business Efficiencies | | | | | | |
| Goal 7.3 a | Implement Fuel Station Card-Lock | FSD | | | | |
| Goal 7.3 b | Increase the number of customers using the web site to manage their customer accounts and make web payments. | FSD | | | | |
| Goal 7.3 c | Evaluate contracted services or use of consultants for business tasks | ASD | | | | |