



2025 Strategic Annual Work Plan

February 11, 2025



5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Water Efficiency Concepts and Strategies Toward Short and Long-Term Goals	Continue implementation of 5-Year Water Efficiency Master Plan action items.	Ongoing	Budgeted
	Evaluate incentive offerings and revise to align with achieving goals in Water Efficiency Master Plan, recommend program changes and/or updated based on evaluation.	Ongoing	Budgeted
b. Water Efficiency Incentives, Education and Outreach	Launch outreach campaign to promote increased rebates to maximize the grant funding that has been awarded for turf removal.	Begin in Q1	Budgeted
	AMI Implementation – Update to Board.	Q1	Budgeted
	AMI Implementation - Request For Proposal.	Q3	Budgeted
c. Implementation Of Water Loss Control and Leak Detection Program Recommendations	Implement pilot to evaluate acoustic hydrant loggers and AMI meters, which may log district-side leaks.	Begin in Q1; Study findings complete by Q3	Budgeted
d. Industry Association Participation	Participate in the Water Research Foundation's Residential End Use Study..	Study Projected for Completion Q4	Budgeted

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Partnerships to Test Technologies/Theories	Evaluate effectiveness of the turf rebate increase leveraging multi-benefit funding from Marin County Storm Water Pollution Prevention Program.	Complete by Q4	Budgeted
	Partner with Marin Wildfire Prevention Authority to ensure incentives and programs support wildfire resistant landscapes.	Complete by Q4	Budgeted
	Conduct turf removal participation survey and develop targeted programs.	Complete survey in Q1; measures by Q3	Budgeted
f. Policy Review	Align Water Efficient Landscape Ordinance with State rulemaking, which is underway.	Complete by Q3	Budgeted
	Begin process for extending Local Jurisdictions MOU which expires Dec. 31, 2025.	Begin by Q2	Budgeted

5-YR ACTION ITEMS		WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Roadmap Short-Term Actions	1.	Water Efficiency actions outlined in Obj. 1.	1. Q1-Q4	1. Budgeted
	2.	Soulajule to Nicasio Pipeline – Easement acquisition, design & CEQA.	2. Q2	2. Budgeted
			3. Q3	3. Budgeted
	3.	Complete Stream release automation.	4. Q2	4. Budgeted
	4.	Present emergency supply plan.	5. Q1-Q4	5. Budgeted
	5*.	Nicasio Spillway Modifications – environmental review and permit submittal.		
b. Roadmap Medium Term Projects and Longer-Term Goal Update	1.	Select preferred Water Supply Roadmap Project for further development.	1. Q2	1. Budgeted

* New 5-year action item, not identified in the District's 2024-2028 Strategic Plan

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Recycled Water Project Partnerships	Continue relationship building with North Bay Water Reuse Authority and local sanitation districts.	Ongoing	Budgeted
b. Sonoma Water Agreement Renewal	Execute renewal agreement with Sonoma.	Q1	Budgeted
c. Relationship Building for Regional Water Supply Projects	Strategic meetings with Sonoma Water and contractors on regional water supply planning.	Ongoing	Budgeted
d. State And Federal Support for Regional Supply Development	<ol style="list-style-type: none"> 1. Receive WRDA Funding. 2. Seek funding for recycled water projects. 	<ol style="list-style-type: none"> 1. TBD 2. Q1-Q2 	Budgeted

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Reservoir Management Plans	Review industry best practices for reservoir management.	Q2	Budgeted
b. Water Treatment Option Improvements	1. Following successful liquid ammonium sulfate Pilot study develop next steps.	1. Q4	1. Budgeted
	2. Review disinfection practices at treatment plants.	2. Q2	2. Budgeted
c. Water Quality Lab	Complete refocus of Lab resources to distribution system and reservoir management.	Q1	Budgeted
d. Water Quality After Wildfires/ Industry Lessons Learned	Develop summary of wildfire impacts to water quality in surface water reservoirs and impacts to conventional drinking water treatment.	Q3	Budgeted
e. Regulation Development	Monitor proposed and upcoming regulations for drinking water.	Ongoing	Budgeted

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Above Ground Facility Assessment	Initiate condition assessment process for remaining tanks and pump stations.	Begin in Q1	Budget Modification Needed
b. PRP Prioritization Process Review	Refine and bring to Board an updated process for prioritization. Update could occur with Water System Master Plan presentation identified in Objective 1.h.	To the Board by Q1	n/a
d. Workplace Facilities Plan	Complete facilities plan.	Begin in Q1	Budget modification needed
e. Above-ground Infrastructure Hardening	Completed - Fire hardening assessments for all pump stations have been completed and information will be incorporated into action item for the overall condition assessment of pump stations and tanks.	COMPLETE	---
f. Water System Single Points of Failure Assessment/CIP Incorporation	Begin assessment to integrate into CIP effort following completion of Water System Master Plan (WSMP) Objective 1.h.	Begin in Q1	n/a
g. Water System Security Measures	Enhance facility security standards that will be used to evaluate the Above Ground Condition Assessment infrastructure and identify security needs to be prioritized in the capital planning effort. Tied to Objective 1.a.	Begin in Q1	n/a
h. Water System Master Plan	Complete and use information from the WSMP to identify and prioritize infrastructure capital replacement projects. Presenting to the Board in January 2025.	By Q1	Budgeted

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Planning with Infrastructure Condition Assessment/Other Data	Develop long-term CIP.	Begin in Q2	Budgeted
b. Project Grant Opportunities	Continue to identify grant funding opportunities that are a fit for the Districts capital projects.	Ongoing	Budgeted
c. Bond Funding Opportunities for Generational Projects	Captured in Goal 4, Objective 4b.	--	--

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Resource Needs Assessment	Completed - resource planning analysis was finished; leveraged several position conversions with 4 new positions resource needs will be evaluated on an ongoing basis.	COMPLETE/Ongoing	Budgeted
b. On-Call Contracts for Expedited Small Repairs	Completed - executed on-call construction contracts to expedite small capital work and will continue to utilize such contracts into the future.	COMPLETE/Ongoing	Budgeted
c. On-Call Engineering Firm Consulting Contracts	Completed - executed on-call geotechnical and civil engineering design contracts to streamline workflow and productivity.	COMPLETE/Ongoing	Budgeted
d. District Contract Specifications Update	Update District contract specifications to most current Construction Specifications Institute Master format.	Begin by Q3	n/a
f. Paving Restoration Requirements	Initiate discussions with neighboring jurisdictions now that the pavement assessment criteria has been established with a paving expert.	Begin in Q1	Budgeted

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Division Training Program	Formalize training to ensure new and current employees receive consistent training within their departments.	Ongoing	n/a
b. Standard Operating Procedure Development	Review/update or develop 5-10 SOPs this year.	Finish in Q4 2025	n/a
c. Learning Through Industry Associations Involvement	Continue developing the “Pipe Tapping Team” to compete at state and regional conferences. Offer opportunities for staff to engage and learn through industry associations.	Compete at regional AWWA conference. Staff attending conferences.	Budgeted
d. Operations Organizational Structure Review	Consistently review when filling vacancies	Ongoing	n/a
e. Efficiency Improvements via Equipment and Process Advancements	Continue to engage staff and develop a list of equipment/practices to improve efficiency, safety, effectiveness, and staff’s work.	Ongoing	n/a

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Fleet Regulatory Compliance	Hire consultant to design EV charging stations from District Fleet Vehicles.	Begin in Q1	Budgeted
b. Pump Station Evaluation for Alternative Energy Use	Evaluate feasibility of integrating solar with pump station rehabilitation projects following completion of Objective 1.a.	Ongoing	n/a
c. Carbon Neutrality	Initiate carbon neutrality policy discussion with the Board.	Begin in Q4	n/a
d. Micro-Turbine Technology	Completed – presented micro-turbine and pump storage findings to the Board at the Operations Committee Meeting on July 19, 2024.	COMPLETE	---
e. Renewable Power Opportunities	Presented finding to Board at July 19, 2024 OPS meeting. SGTP clear wells were identified as good options for solar. Staff will be conducting structural assessment of the clear wells for solar options.	By Q4	Budget modifications needed

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Emergency Response Plan Update	Update our employee notification system as it pertains to response expectations before, during and after an incident.	By Q3	n/a
b. Annual EOC tabletop Exercises	Train District staff with a designated role in the EOC and ICS Organizational Structure. Conduct an EOC-activation drill from the moment an incident occurs through the completion of an initial Incident Action Plan.	By Q2; Ongoing	n/a
c. Dam EAP Review and Tabletop Exercises	All seven dam EAP's have been accepted by Cal OES. Periodic review of contact information to occur on a yearly basis with full EAP reviews every five years.	Ongoing	n/a
d. Emergency preparedness training with Marin County OEM	Participate in County Office of Emergency Management monthly meetings.	Ongoing	n/a
e. FEMA-compliant Contracts for Disaster Recovery Needs	Staff finalizing development of FEMA compliant contract templates that will be ready to use following emergencies. Targeting completion early 2025.	By Q1	n/a
f. Risk Reduction Assessments	Water system single points of failure assessment including fire hardening and security measure assessments as (outlined in obj. 1).	Begin in Q3	n/a

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Lagunitas Creek Restoration	Initiate implementation of Phase 1B (Sites 1, 2, 3, 12 and 13)	Q3	Budgeted/Grants
c. PIT Program	Annual PIT program monitoring and gravel augmentation study	Q4	Budgeted/Grants
d. Apply technical expertise to regional restoration projects	Complete Nicasio Creek Fisheries Study.	Q4	Budgeted

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Public Safety Partnerships	Coordinate 2-3 inter agency trainings for search and rescue, and wildfire response	By Q4	n/a
b. Biodiversity, Fires, and Fuels Integrated Plan	Complete BFFIP priorities to achieve 1,500 acres of vegetation management and forest restoration projects. Integrate pathway modeling to inform and refine treatment priorities.	By Q3	Budgeted/Grants
	Complete needed environmental compliance and associated program planning, contracting, monitoring and grant reporting.		
	Continue developing burn plans to support implementation of prescribed fire on the watershed.		
c. Strategic Partnership for Regional Resiliency	Continue collaboration with Marin Prescribed Burn Cooperative, Marin Wildfire Prevention Authority, and One Tam Forest Health Strategy	Ongoing	n/a
d. Workforce Development	Ranger Trainee's complete Ranger I certifications	Q3	Budgeted
	Site Sponsor for AmeriCorps Watershed Stewardship Program to support fisheries and Grizzly Corps Fellow to support the volunteer program.	Q2	
	Collaborate with Fire Foundry, California Conservation Corps, and California Conservation Corps North Bay to support BFFIP implementation, trails and water restoration projects	Q4	
e. Wildland Firefighting and Vegetation Equipment	Evaluate options on the used market to replace Water Tender. Add one additional Ranger Vehicle to fleet to support staff.	By Q4	Budgeted/ Modification may be needed

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Annual Biological Monitoring	Complete annual biological monitoring per BFFIP, Lagunitas Creek Stewardship Plan, and to support project level compliance	Q4	Budgeted
b. Regional Partnerships	Contribute staff expertise to advance One Tam Annual Work Plan, TOGETHER Bay Area, California Landscape Stewardship Network, and Golden Gate Biosphere Network	Ongoing	n/a
c. Regional Restoration Opportunities	Evaluate multi-benefit opportunities associated with Nicasio Spillway Project	Q4	n/a
d. Stewardship Programs	Sustain trail stewardship events and establish contract with trail maintenance contractor	Q4/Ongoing	Budgeted
e. Natural Resources Interpretation	Hosting quarterly watershed interpretive hikes	Q4	Budgeted

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Watershed Rec Mgmt Planning Feasibility Study	Advance strategic opportunities outlined in the feasibility study.	Q4	Budgeted
b. Azalea Hill Trail Restoration Project	Complete liberty gulch segment, update compliance document, and initiate parking lot design work.	Q3	Budgeted
c. Evaluate Priority Roads and Trails	Develop Request for Proposals to initiate watershed roads and trails project.	Q3	Budgeted/ Modification may be needed
d. Nature-based Self-guided Tours and Outreach Materials	Update 2-3 watershed kiosks.	Q3	Budgeted

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Roads and Trails Management Plan	Develop Request for Proposals to initiate watershed roads and trails project.	Q3	Budget modification needed
b. Integrate Watershed Facilities into Master Planning Process	Captured in Goal 2, Obj. 1d.	---	---
c. Watershed Housing	Focused on improving Sky Oaks Headquarters.	Ongoing	---

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Stabilization Reserves	Completed - the Board approved revisions and additions to the District's reserve policy (46) to add clarity to the definition, purpose and calculations for each of the existing reserve funds and added an additional reserve fund for Water Supply Projects.	COMPLETE	---
b. Long-Term Capital Improvement Program with Stable Investments	As part of the upcoming two-year budget process, Finance and Engineering will work to integrate recent engineering studies into the 20-year Capital Improvement Program.	Q2	n/a
c. Non-Rate Revenue Updates	Review non-rate revenues as part of the budget process in 2025.	Q2	n/a

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Connection Fee Study	Present recommendations to the Board.	Q1	No
b. Low-Income Program Evaluation	Evaluate program to determine whether criteria can be modified.	Q3	No

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. SAP Update to Streamline Processes and Improve Analytics	Award contract for Payroll and HR module Systems Integrator contract; engage outside consultant to evaluate customer service and maintenance module needs.	Contract award by Q1; Consultant evaluation by Q2	Budgeted
b. Leverage External Resources for Efficiency	Evaluate the benefits and potential tradeoffs of utilizing additional consulting service for project implementation in the Engineering Division; continue to leverage expertise and assistance from the Fire Foundry and the CCNB to support the Watershed Division.	Ongoing	---
c. AA or Better Credit Quality Rating	Continue to meet with credit ratings agencies on an annual basis and work to prioritize issues that impact long term rating criteria.	Ongoing	---
d. Online & Electronic Bill Payments	Transition to a new online customer bill payment system.	Q2	Budgeted
e. Streamline the Application Process for Discount Programs and Leak Adjustments	Continue to identify processes that can be eliminated or reduced.	Ongoing	---

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. WRDA Funding for Water Supply Projects	Continue to engage USACE in an effort to get funding appropriation for Marin Water projects.	Q4	Budgeted
c. State and Federal Grants	Respond to state and Federal grant funding solicitations that align with District near term projects	Q4	n/a
e. Leverage Regional Partnerships	Continue to work with the Marin Wildfire Prevention Authority, One TAM, the County of Marin and Sonoma Water to implement best practices and maximize grant opportunities.	Ongoing	n/a

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Online Customer Tool Improvements	Completed – Implemented roll out of customer bill estimator on the District website in 2024.	---	---
b. Bi-annual fiscal policies review	Completed in 2024 – this will be an ongoing effort as part of the budget and rate setting process.	COMPLETE/ongoing	n/a
c. Quarterly Financial Summary Publication	Completed - Quarterly financial updates are now being posted routinely to the District's Financial Information webpage.	COMPLETE/ongoing	---
d. Regular Internal and External Financial Audits	Complete - The external audit was completed in November 2024; additional areas for audit and related process improvements will be identified as part of the ERP Modernization project.	COMPLETE/ongoing	---
e. Proactive Customer Communications for Grants and Investments in Key Priorities	Disseminate news releases and other outreach messaging channels to announce receipt of grant awards and to share updates of how funds are used for project implementation.	Ongoing	n/a

5-YEAR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Recruitment Collateral	Redesign the District employment website landing page to add features that improve navigation, showcase District accomplishments and provide a sense of workplace culture.	By Q3	n/a
b. Recruitment Partnerships with local Community Orgs, Colleges, Trade Schools	Continue participation in the monthly Baywork meetings to establish a Baywork Northbay consortium focused on outreach to community colleges, high schools and community-based organizations for the purposes of developing awareness of careers in the water industry and sharing career and internship opportunities.	Ongoing	Budgeted
	Host the Baywork for their Northbay “Workshop on Wheels.”	Q2	
	Continue to send weekly digest emails containing Marin Water job opportunities to agencies listed on our established community outreach list. Continue to develop the outreach list.	Ongoing	
	Attend community career fairs as available.	Ongoing	
c. Welcoming Onboarding Process	Completed – new onboarding process was developed and rolled out; process will continue to be utilized for new employees and fine-tuned, as needed.	COMPLETE/ ongoing	---
d. Diversity, Equity and Inclusion Training	Completed - All existing employees went through training and training is integrated into the onboarding process for new employees.	COMPLETE/ ongoing	---

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Employee Training Program	Finalize and launch a 5-year training program to include training for all staff and tailored for specific classification groups. Training will cover soft skills training (example: customer service), leadership training, management training AND some technical training including data security training and trainings for new IT tools to be rolled out Districtwide (examples: M365, SAP and support for technical training for specific departments and classifications).	Q1	
	The training program will include a 3 - day leadership academy as baseline training. Managers and supervisors who have not completed the academy will be enrolled in the Winter 2025 and Spring 2025 academies.	Q1 – Q3	Budgeted
	Implement learning aids on topics beneficial to the organization. For example: To support employees seeking internal promotions, a learning aid on interviewing techniques has been developed; sessions will begin in January 2025.	Q-1 - Q3	
f. Employee Recognition and Appreciation Programs	Refresh the quarterly employee recognition program and the functional and procedural aspects of the recognition committee utilizing guidance from staff input and corporate best-practice research.	By Q2	n/a

Orange text indicates an update that was incorporated following board input at the 1/14/2025 board retreat.

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
g. Strengthened Internal Communication Strategies	Expand internal distribution of the Employee Impact+ internal newsletter to mobile device delivery.	By Q4	n/a
	Pilot internal digital signboards systems to display key internal messages at strategic locations throughout worksites to further enhance District-wide internal communication and awareness.	By Q3	Budgeted
h. Employee Engagement and Organizational Improvement	Continue to build on the internal engagement initiatives the RIPPLE committee launched and identified in Year 1.	Ongoing	Budgeted
i. Workplace Safety	Continue to identify safety programs with room for improvement through policy assessment and evaluation of our practices. Ensure staff is adequately trained on the details of our updated written safety programs.	Ongoing	
	Train District staff with a designated role in the EOC and ICS Organizational Structure; fine tune the process for communicating with employees during crisis; conduct an EOC-activation drill from the moment an incident occurs through the completion of an initial Incident Action Plan.	End of Q1 & Q3	N/A
j. Work Facilities Assessment and Evaluation	Captured in Goal 2, Obj. 1d	---	---
k. Staffing Assessment	Develop District-wide list of internal resource gaps and present it to the Board as part of the two-year budget process.	By Q1	TBD

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Facilities, Programs, Outreach Accessibility Audit	Incorporate first phase of identified ADA website accessibility enhancements into implementation of District's website CMS migration project.	By Q2	Budgeted
b. Key Messaging and Visual Brand Identity	Develop new engaging outreach booth displays for use at community events, and new indoor facility signage for the customer counter at the Administration Building and the visitor counter area at the Watershed Sky Oaks Office.	By Q2	Budgeted
	Update the District's Communications and Branding Guidelines and work with all teams to ensure its successful incorporation into various District activities and functions.	By Q1	n/a
c. Geo-targeted Customer Communications	Research, evaluate and select cost-effective platform that provides geo-targeted call and SMS capabilities and prepare system for public launch including developing template messaging, trainings for staff users, and outreach to explain its roll out.	By Q4	Budgeted
d. Data-Driven Targeted Water Efficiency Outreach Campaigns	Implement seasonal water efficiency campaigns that target higher water users, including development of a new campaign to highlight the one-time increased turf rebate.	Ongoing; New turf rebate campaign by Q2	Budgeted
	Support the pilot AMI deployment effort.		Budgeted

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Creative Storytelling Campaigns and Techniques for Priorities and Initiatives	<p>Utilize drone imagery, visual assets and creative writing in new ways to help show and tell to customers the district's major investments in our water system on CIP projects, including Pine Mountain Tanks, Lagunitas Creek Habitat Enhancements, large pipeline replacements, water supply roadmap work, and vegetation management/forest restoration activities.</p> <p>Seek out strategic messaging opportunities to educate the public on various, lesser-known ways the District supports the community.</p>	Ongoing	Budgeted
f. School Open Houses, Field Trips, Virtual Tours and Curricula	Connect youth with water education through continued focus on the district's classroom presentation offerings, water walks on the watershed, and ZunZun Musical Watershed assemblies.	Ongoing	Budgeted
g. Engagement with Local Municipalities	Develop schedule of engagement opportunities at town/city council meetings; coordinate/ provide District updates at a different council meeting once per quarter.	By Q2	n/a

Orange text indicates an update that was incorporated following board input at the 1/14/2025 board retreat.

5 YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Industry Associations	Captured in Goal 2, Obj. 4c	---	---
b. Professional Development Opportunities	Encourage staff at all levels to engage in relevant professional associations through submittal of abstracts, joining committees, and other similar types of engagement.	Ongoing	---
c. Stakeholder Collaboration and Communication	Develop stakeholder list and identify key contacts to connect with for ongoing relationship building and communications.	By Q1	---
	Continue building working relationships with Federated Indians of Graton Rancheria.	Ongoing	

5 YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/N BUDGET OR FUNDS NEEDED
a. Intranet	Implement Microsoft M365 services throughout District and utilize included SharePoint Online application to build intranet site, including migration of files from legacy solution to cloud-based document store.	M365 by Q2 ; Intranet by Q4	Budgeted
b. Employee Self-Service Function	Implement an employee-centric services portal administered by HR and Payroll which is part of the District's Enterprise Resource Planning (ERP) modernization effort.	By Q4	Budgeted
c. Workplace process/ Tech Efficiency Improvement Program	Incorporating into Goal 5, Objective 1f.	---	---
d. Academia Partnerships	Assess and report to the Board on continued engagement with Isle Utilities, which the District joined as a piloting member in 2024.	Ongoing	Budgeted
e. Succession Planning Through Documented SOPs/Training Overlap	Captured in Goal 2, Obj. 4b	---	---
f. AMI Conversion and Associated Customer Portal	Captured in Goal 1, Obj. 1c	---	---
g. SAP Selection, Implementation & Operational Integration	Implement the initial implementation efforts for the District's Enterprise Resource Planning (ERP) modernization effort (Payroll and HCM).	Kickoff Q1; Complete Q1 2026	Budgeted
h. Online Customer Bill Pay System Replacement	Implement District/customer transition to new online bill pay system.	By Q2	Budgeted