

GOAL 1: Reliable Water Supply

Timing Key: Q1 = Jan-Mar, Q2= Apr-Jun, Q3= Jul-Sept, Q4= Oct-Dec

Objective 1 – Reduce Potable Water Use			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Water Efficiency Concepts and Strategies Toward Short and Long-Term Goals	Complete Water Efficiency Master Plan and begin implementation.	Publish by Q2	Prepared draft of Master Plan for the May 1 Water Efficiency Mater Plan Workshop.
b. Water Efficiency Incentives, Education and Outreach	Evaluate incentive offerings and revise to align with WEMP.	By Q2	High efficiency toilet and clothes washer rebate programs changes effective 6/30/2024 to align with Water Efficiency Master Plan.
	Implement seasonal water efficiency campaign strategies targeted to higher water users using creative collateral, customer success stories, point-of-service displays, and events.	Q1-Q4	Launched new customer success stories series, publishing 4 in first 6 months, and repackaged for maximized use in various campaign strategies. Completed implementation of winter/spring (indoor) campaigns, including the indoor efficiency estimator educational campaign. Initiated launch of outdoor irrigation season campaigns, using targeted digital ads, an advertorial, and a rain barrel giveaway in collaboration with a local business.
c. Implementation of Water Loss Control and Leak Detection Program Recommendations	Complete water loss study and begin implementation of selected actions.	By Q4	Project is ongoing; board briefing planned for Q3.
d. Industry Association Participation	Participate in the Water Research Foundation’s Residential End Use Study.	By Q4	Held kick-off call for the study on 5/20/2024; the study will use 2024 data and will publish Q4 2025.
e. Partnerships to Test Technologies/Theories	Prepare for AMI deployment: <ul style="list-style-type: none"> • AMI Program Manager. • Establish timeline. • Pilot testing. 	Program Manager by Q2; Timeline by Q3 Begin pilot Q3/Q4	AMI Program Manager has been selected, Board update planned for Q3 to present high-level schedule for moving toward AMI deployment.
f. Policy Review	Review the effectiveness of the District’s Graywater Ordinance, water efficient fixture standards, and water efficient landscape ordinance and provide alternatives for Board consideration.	Q2	Evaluated Graywater Ordinance and the fixture standards and presented alternatives to the Board for discussion at the Comms/WE Committee on 5/15/24.
	Align Water Efficient Landscape Ordinance with the State rulemaking currently underway.	Q3	Nothing to report (District’s Landscape Ordinance will be updated when the state rulemaking process is finalized. Public comment ended on 1/16/24).
Objective 2 – Augment Existing Water Supply			

ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Roadmap Short-Term Actions	<ol style="list-style-type: none"> Water Efficiency actions outlined in Objective 1. Begin design and CEQA for Soulajule to Nicasio pipeline. Design for Soulajule electrification. Design/bid Phoenix to Bon Tempe Treatment Plant. Complete stream release project. Develop emergency supply augmentation plan for times of water shortages. 	<ol style="list-style-type: none"> Q1-Q4 Q4 Q4 Q3 Q4 Begin Q4 	<ol style="list-style-type: none"> See previous section Pipeline work has started and so far on track. Electrification project paused to assess the adequacy of capacity and impact of water supply projects. Nothing to report. Nothing to report. Nothing to report.
b. Roadmap Medium Term Projects and Longer-Term Goal Update	Select preferred alternative for Conveyance and begin 30% design.	Preferred alternative selection by Q3; Award of contract for 30% design by Q4	Shortlist evaluation underway and on track for Q3 selection of preferred alternative.
	Select preferred alternative for Local Storage and begin 30% design.	Preferred Alternative Selection by Q3; Award of contract for 30% design by Q4	Shortlist evaluation is underway and on track for selection of preferred alternative in late Q3. Moved Nicasio Spillway Modifications Project out of planning and into design and implementation.
	Complete feasibility analysis for Petaluma River Desal.	By Q3	Planning report out to board in Q3 on findings.

Objective 3 – Preserve and Enhance Existing Partnerships

ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Recycled Water Project Partnerships	Continued relationship building work with North Bay Water reuse authority and local sanitation agencies.	Ongoing	Active member with NBWRA.
b. Sonoma Water Agreement Renewal	Key terms agreed to and signed.	Key terms agreed to by Q2; Signed by Q4	Staff level progress on key terms delayed as SW is occupied with other initiatives; staff meeting scheduled for June 6.
c. Relationship Building for Regional Water Supply Projects	Strategic meetings with Sonoma Water and contractors for regional water supply planning.	Ongoing	Meetings taking place with contractors.
d. State And Federal Support for Regional Supply Development	Receive first tranche of WRDA funding for Soulajule water supply project.	TBD	WRDA funding was not prioritized by ACOE and other avenue is being explored to get this item into the Corps budget for this year.

Objective 4 – Provide High-Quality Water to Customers

ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Reservoir Management Plans	Review industry best practices for reservoir management plans.	By Q4	Nothing to report.
b. Water Treatment Option Improvements	Pilot study to replace ammonia with liquid ammonium sulfate to improve safety protocols and cost-effectiveness.	By Q4	Nothing to report.
c. Water Quality Lab TNI Accreditation	Achieve new TNI accreditation for lab.	By Q4	Third party audit conducted in March with minimal findings. Accreditation is anticipated on or ahead of schedule.

GOAL 2: Resilient Water System

Timing Key: Q1 = Jan-Mar, Q2= Apr-Jun, Q3= Jul-Sept, Q4= Oct-Dec

Objective 1 – Infrastructure Condition Assessment			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Above Ground Facility Assessment	Initiate condition assessment process for remaining tanks and pump stations.	Begin by Q4	Nothing to report.
b. PRP Prioritization Process Review	Refine and bring to Board an updated process for prioritization.	Begin by Q3; to Board Q4	Nothing to report.
d. Workplace Facilities Plan	Complete facilities plan.	By-Q3 Complete by Q4	Assessments of all workplace buildings currently in progress.
e. Above-ground Infrastructure Hardening	Identify needs to be included into the capital planning effort.	Complete by Q3	On track to complete in Q3. Inspected 47 of 97 Pump Stations and completed Pump Station Defensible Space analysis for each of the 47 pump stations.
f. Water System Single Points of Failure Assessment/CIP Incorporation	Begin assessment to integrate into CIP effort.	Begin by Q4	Nothing to report.
g. Water System Security Measures	Develop facility security standards that will used to evaluate the Above Ground Condition Assessment infrastructure and identify security needs to be prioritized in the capital planning effort.	Begin by Q4	Nothing to report.
h. Water System Master Plan	Complete and use information from the WSMP to identify and prioritize infrastructure capital replacement projects.	Complete by Q3	Nothing to report.
Objective 2 – Capital Planning			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
b. Project Grant Opportunities	Staff will continue to identify grant funding opportunities that are a fit for the Districts capital projects.	Ongoing	Captured in Goal 4, Objective 4c.
c. Bond Funding Opportunities for Generational Projects	Captured in Goal 4, Objective 4b.	---	Nothing to report.
Objective 3 – Capital Project Delivery			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Resource Needs Assessment	Develop resourcing plan for enhanced CIP, including reallocation of existing positions leveraged with external support.	Complete by Q2	Staffing resource analysis ongoing, position conversions underway.
c. On-Call Engineering Firm Consulting Contracts	Execute on-call engineering contracts for specialty support.	Complete by Q3	Nothing to report.
f. Paving Restoration Requirements	Complete pavement assessment criteria with paving expert and begin discussions with neighboring jurisdictions.	Complete assessment & begin meetings by Q4	Nothing to report.

Objective 4 – Operations & Maintenance			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Standard Operating Procedure Development	Review/update or develop SOPs. Select 10 of the highest priority SOPs to update this year.	Complete by Q4, 2024	Reviewed 121 SOPs utilized within the Operations Division and identified the need for and created five additional new SOPs.
b. Learning Through Industry Associations Involvement	Reinstate 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.	Pipe Tapping Team competed at AWWA Operator Symposium in Burlingame. Staff participated in supply chain resilience regional tabletop exercise in San Mateo. Actively pursuing opportunities for staff to visit other water utility companies to learn and engage in industry advancements – most recently visited East Bay Municipal Utility District, Contra Costa Water and San Jose Water.
e. Efficiency Improvements via Equipment and Process Advancements	Establish a process to engage staff and develop a list of equipment/practices to improve efficiency, safety, effectiveness, and staff’s work (e.g. leak detection, thermal gauge, etc.)	Ongoing	Coordinated with various tool and equipment vendor representatives to create an opportunity for staff to attend demonstrations with different tools used throughout the industry to improve efficiency and safety. Tools and equipment demonstrated include pneumatic chain saw, diamond wire rope hydraulic pipe cutter, vehicle emergency lighting and a water service installation tool.
Objective 5 – Energy Planning			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
c. Carbon Neutrality	Initiate carbon neutrality policy discussion with the Board.	Begin by Q4	Nothing to report.
d. Micro-Turbine Technology	Take another look at possible locations in transmission and distribution system for next-gen micro turbine.	Begin by Q4	Nothing to report.
e. Renewable Power Opportunities	Work with Board on renewable energy goals/policy.	Begin by Q3	Nothing to report.
Objective 6 – Emergency Response Readiness			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Emergency Response Plan Update	Review current emergency response plan, including the role of the board during a disaster/emergency, and develop timeline and process for its update.	By Q4	Nothing to report.
b. Annual EOC tabletop Exercises	Coordinate 2 tabletop exercises to help prepare/ train staff for an organized response to specific emergency/natural disaster scenarios most common to California and the water industry. (also in Goal 5)	Q2 and Q4	Updating Emergency Operations Plan and EOC staffing to inform upcoming desk/tabletop exercises.

c. Dam EAP Review and Tabletop Exercises	Review EAP contact information.	Q1 Complete in Q3	Dam EAPs currently under Cal OES review for approval (3 of 7 EAP's approved). Tabletop exercise to follow approval of EAPs.
d. Emergency preparedness training w/ Marin County OEM	Participate in County Office of Emergency Mgmt monthly meetings.	Ongoing	Continued staff participation at OEM monthly meetings.
e. FEMA-compliant Contracts for Disaster Recovery Needs	Develop FEMA compliant contract templates that will be ready to use following emergencies.	Complete Q3	Nothing to report
f. Risk Reduction Assessments	Water system single points of failure assessment (outlined in obj. 1).	Begin Q4	Nothing to report

GOAL 3: Watershed Stewardship

Timing Key: Q1 = Jan-Mar, Q2= Apr-Jun, Q3= Jul-Sept, Q4= Oct-Dec

Objective 1 – Creek Restoration			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Lagunitas Creek Restoration	Secure resource agency permits to begin implementation of Phase 1 restoration (1-6 & 12- 13).	Initiate construction Q3	Secured permits for construction activities. Currently working on a minor amendment to CDFW Permit for environmental compliance conditions.
	Complete restoration construction of 3-5 sites of the 8 sites in Phase I.	Complete construction Q4	Phase 1A Construction Bid award approved at May 21 Board Meeting. ESA Contract amendment for Phase II Design. Construction to begin in July/August.
b. Lagunitas Creek Stewardship Plan	Update Lagunitas Creek Stewardship Plan.	Complete Q4	Nothing to report.
c. PIT Program	Install two new Passive Integrated Transponders Antennas to improve fisheries monitoring data collection. One of which will be installed within Phase I restoration reach.	Complete Q3	Nothing to report.
d. Apply technical expertise to regional restoration projects	In a support role, participate in discussions regarding Redwood Creek, and add value where we can.	Ongoing	Nothing to report.
Objective 2 – Watershed Resiliency to Wildfire			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Public Safety Partnerships	Coordinate 2-3 inter agency trainings for search and rescue and wildfire training.	Complete by Q4	Watershed rangers participated in overnight watershed training in May conducted by Marin County Search and Rescue.
b. Biodiversity, Fires, and Fuels Integrated Plan	Complete BFFIP Year 5 priorities to achieve 1,500 acres of vegetation management and forest restoration priorities. Complete needed environmental compliance and associated program planning, contracting, monitoring and grant reporting.	Complete by Q4	On track to complete 1,500 acres of BFFIP work by June 30 with grant funding from CAL FIRE. Hired an additional Forestry Contractor in April. Additional contract to be bid in June and awarded in July to support scaling up of vegetation work.
c. Strategic Partnership for Regional Resiliency	Implement One Tam Forest Health Strategy and one prescribed burn project in coordination with Marin County Fire and One Tam agencies.	Complete by Q4	One Tam Partners completed Forest Health Strategy and used it to support two awarded grants through CAL FIRE and Wildlife Conservation Board. New contract established with County Fire to support prescribed burning implementation.
d. Workforce Development	Secure grant funding for CCNB crews to carryout BFFIP work and support forest ecology crew training	Complete by Q4	Secured \$500K in CCNB crew time for FY 2024 and 2025.
	Secure grant funding for CCC crews to carryout trail work.	Complete by Q4	Nothing to report.
	Contract with Marin County Fire Foundry Program to support early career development.	Complete by Q2	Completed.
	Apply as a site sponsor to secure AmeriCorps Grizzly Fellow and Watershed Stewardship Program participants for 2025.	Complete by Q4	Approved for FY 24/25 Grizzly Corps fellow.

e. Wildland Firefighting and Vegetation Equipment	Add one additional Ranger Vehicle to fleet to support increased staff.	Complete by Q3	Nothing to report.
	Add 1-2 additional UTV's to support Ranger Trainee field work.	Complete by Q3	Nothing to report.
Objective 3 – Stewardship			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Annual Biological Monitoring	Contribute biological monitoring data and staff expertise to update of One Tam Peak Health Report.	Complete by Q4	One Tam Peak Health Report finalized in April. Public webinar in June
b. Regional Partnerships	Update One Tam Strategic Plan, Annual Work Plan and MOU.	Complete by Q2	Board approved One Tam MOA at the April 2 Board of Directors meeting.
c. Regional Restoration Opportunities	Contribute staff expertise to complete Golden Gate Biosphere Network Climate Vulnerability Study.	Complete by Q4	Nothing to report.
d. Stewardship Programs	Host trail maintenance training for seasonal staff and Ranger trainees to build capacity for volunteer trail stewardship work.	Complete by Q4	Completed trainings in April and May 2024.
	Launch a monthly trail maintenance and stewardship program to engage community members, non-profits and youth teams in watershed stewardship.	Complete by Q4	Coordinated trail events in March, April, May and June.
e. Natural Resources Interpretation	Reimagine trail kiosk signage (6 total) to broaden customer awareness of the service value of District's watershed stewardship work, including its work to preserve the watershed's biodiversity, and to provide education on the source of the community's local water supply.	Complete by Q4	Initiated planning and development of signage concepts.
	Host quarterly watershed hikes and/or community events.	Complete by Q3	Nothing to report.
Objective 4 – Recreation			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Watershed Rec Mgmt Planning Feasibility Study	Complete study and advance priority outcomes in alignment with study timeframes.	Complete by Q2; Develop timeline for implementation of priority outcomes Q3	Presented Pilot Program Framework at June Watershed Committee Meeting.
b. Azalea Hill Trail Restoration Project	Complete 1.9 miles of improvements along multi-use trail; close 2 miles of the 4.4 miles of social trails in the project area; complete 1 additional bridge.	Complete by Q4	Bridge construction underway near Bolinas Fairfax Road. Two volunteer trail days complete and three rock crossing. CCNB completed installation of trail closure signs and began social trail decommissioning.
d. Nature-based Self-guided Tours and Outreach Materials	Complete a self-guide tour of prescribed burn project sites on the watershed.	Complete by Q4	Developed a self-guided tour of the Ridge Crest Prescribed burn site in collaboration with One Tam.

Objective 5 – Facilities			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Roads and Trails Management Plan	Evaluate priority projects and updates to best management practices and inclusion of recreation management and stewardship. RFP for a consultant to complete an updated plan and associated environmental compliance document.	By Q4	Nothing to report.
	Develop priority list of visitor amenity improvements.	By Q4	Purchased bear-proof trash receptacles, three water fountains, and one bike fix-it station.
b. Integrate Watershed Facilities into Master Planning Process	Explore opportunities for outdoor education and engagement facility.	By Q4	Nothing to report.
c. Watershed Housing	Identify priority facilities updates at Sky Oaks Ranger Station.	By Q4	Nothing to report.
	Evaluate improvements to existing watershed housing assets.	By Q4	Executed contract in May to complete floor repair and maintenance work at Sky Oaks Ranger Residence

GOAL 4: Fiscal Responsibility

Timing Key: Q1 = Jan-Mar, Q2= Apr-Jun, Q3= Jul-Sept, Q4= Oct-Dec

Objective 1 – Financial Stability			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Stabilization Reserves	Per Board Policy updates in 2023, configure reserves to meet minimum balances and consider additions or revisions to target balances.	Q3 (following year end)	Nothing to report.
b. Long-Term Capital Improvement Program with Stable Investments	Provide financial support for development of CIP.	Q4 – budget preparation	Nothing to report.
c. Non-Rate Revenue Updates	Evaluate non-rate revenues (e.g. parking fees, cell tower leases) and update for FY 26.	Q4 – budget preparation	Nothing to report.
Objective 2 – Fair, Equitable and Proportional Rates			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Connection Fee Study	Complete Connection Fee Study, including a review of how population growth may impact demand, and make recommendations to the Board.	Recommendations to Board by Q3	Consultant selected, in data collection phase.
b. Low-Income Program Evaluation	Evaluate current program, compare to other local agencies and review with the Board identified opportunities to enhance the program.	By Q4	Nothing to report.
Objective 3 – Cost-Effective Business Processes			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. SAP Update to Streamline Processes and Improve Analytics	Develop business case and complete vendor selection process.	By Q4	Nothing to report (vendor selection process scheduled to begin Q3).
b. Leverage External Resources for Efficiency	Evaluate resources, including the right balance of internal and external, to support CIP.	Q4	Captured in update for Goal 2, Obj. 3a.
c. AA or Better Credit Quality Rating	Review with credit agencies the state of the District as part of credit rating process.	Q1	Complete – credit rating upgraded to “AA” in Q1 (this rating is considered ‘very high credit quality’).
e. Streamline the Application Process for Discount Programs and Leak Adjustments.	Evaluate current program and compare to other local agencies and present findings and recommendations to Board.	By Q4	Nothing to report.
Objective 4 – Outside Funding to Reduce Financial Impacts on Ratepayers			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. WRDA Funding for Water Supply Projects	Captured in Goal 1, Obj. 3d.	---	Captured in Goal 1, Obj. 3d.

b. Bond Funding	Begin work of bond funding for near-term selection of projects.	Q4	Nothing to report.
c. State and Federal Grants	Identify priority projects and programs that are competitive for state and Federal funding opportunities and submit grant applications.	Q4	Secured \$10,067,222 in grant award funds for: DWR Pipeline Replacement Project (\$6,500,000), USBR Applied Sciences (\$152,190), MCSTOPP Rain Water Harvesting (\$15,032), WCB One Tam Forest Health (\$2,800,000), CDFW Lagunitas Creek Restoration (\$600,000). Submitted grant applications, which are pending, totaling \$23,400,000 for: Cal OES/FEMA SGTP Clarifiers, USBR AMI Expansion, USBR Planning and Design Grant.
e. Leverage Regional Partnerships	Support ACWA, and TOGETHER Bay Areas legislative work in support of state funding for grant programs that support District projects and programs. Support One Tam efforts to develop funding opportunities as a collaborative.	Q4	Nothing to report.
Objective 5 – Financial Transparency			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Online Customer Tool Improvements	Develop more interactive and informative bill estimator.	Launch tool by Q2	Developed and published a new digital rate calculator and indoor efficiency estimator tool to website in February.
b. Bi-annual fiscal policies review	Conduct internal review and update to financial and purchasing policies.	Present to board by Q4	Purchasing policy review is underway, will begin initial discussions in late Q2
c. Quarterly Financial Summary Publication	Develop quarterly financial statement and post to public website.	Publish quarterly statement by Q4	Completed.
d. Regular Internal and External Financial Audits	Conduct external financial audit and identify internal audit focus areas.	Identify internal audit areas by Q4	On track, interim audit complete.
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 implementations.	Q1-Q4	Disseminated public information and/or secured earned media coverage for the following grant awards: Federal grant for weather forecasting, State grant for Lagunitas Creek Enhancement Project, County grant for rainwater catchment rebates.

GOAL 5: Organizational Excellence

Timing Key: Q1 = Jan-Mar, Q2= Apr-Jun, Q3= Jul-Sept, Q4= Oct-Dec

Objective 1 – Organizational Culture and Values			
ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
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.	Complete by Q3	Nothing to report.
	Refine recruitment collateral to maximize potential reach across various recruitment platforms to attract diverse applicant pools.	Launch by Q1	Launched LinkedIn as a recruitment engagement tool and developed long-term planning strategy for its ongoing management. Designed suite of new recruitment brochure templates and recruitment graphics to use for job advertisements across various platforms.
b. Recruitment Partnerships with local Community Orgs, Colleges, Trade Schools	Identify annual list of local recruitment events, career fairs and other networking opportunities that strengthen relationships and expand contacts within underserved communities that support the growth of diverse, nontraditional applicant pools.	List by Q1; attend events Q2-4	Attended career fairs hosted by Multicultural Center of Marin, Contra Costa Community College's, Marin City. Beginning preparation to host Baywork for their Northbay "Workshop on Wheels in the Fall." Updated and expanded the local community contact list used for sharing weekly digest of job announcements.
c. AND e. Welcoming On-boarding Process / Employee Training Program	Bring on a new HR Training Program position and develop the approach for a District-wide training program with an initial focus on the employee onboarding experience.	Hiring by Q2; Onboarding program in place by Q4	Hired HR Training Program position.
d. Diversity, Equity and Inclusion Training	Complete District-wide DEI training, including an element for new hires, and follow up with a plan for initiatives that will build and reinforce DEI skillsets.	Training Q1, develop plan Q3	99% of employees hired before 3/18/24 completed 3.5 hours of interactive DEI training. A plan has been established for training new hires (and those staff members who were on leave and missed the training) with the next training session for this group set for this fall.
f. Employee Recognition and Appreciation Programs	Evaluate current practices, gather broad staff input, and seek out other employer best practices to develop a plan for implementing enhanced, modernized recognition & appreciation programs.	By Q4	Nothing to report.
g. Strengthened Internal Communication Strategies	In an effort to strengthen alignment, coordination and awareness in the organization on timely and key initiatives and/or issues, launch internal newsletter.	Launch first issue by Q4	Met with new internal staff committee to get input on employee newsletter and currently utilizing feedback to develop publication, with first issue scheduled to publish later this summer.

h. Employee Engagement and Organizational Improvement	Launch employee engagement survey and develop subsequent action plans based on common themes derived from survey responses.	Survey complete by Q1, action plans developed by Q3.	Completed district-wide employee engagement survey in April 2024. A multi-departmental staff team has been assembled to focus on enhancing the Marin Water employee experience and increasing staff engagement through the development of broad and sustainable initiatives.
i. Workplace Safety	Assess and evaluate the District’s Safety Program and identify key initiatives to strengthen and enhance the program’s reach.	Q4	Completed an RFP in April and hired safety consultant (Harris and Lee Environmental) to work with safety manager to complete gap analysis.
	Coordinate 2 tabletop exercises to help prepare and train District staff for an organized response to specific emergency/natural disaster scenarios most common to California and the water industry.	Q2 and Q4	Updating Emergency Operations Plan and EOC staffing to inform upcoming desk/tabletop exercises.
j. Work Facilities Assessment and Evaluation	Captured in Goal 2, Obj. 1d	---	Captured in Goal 2, Obj. 1d.
k. Staffing Assessment	Develop Districtwide list of internal resource gaps and opportunities.	Q4	Nothing to report.

Objective 2 – Customer Experience

ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
a. Facilities, Programs, Outreach Accessibility Audit	Incorporate accessibility, via an update to the ADA Assessment and Transition Plan, into worksite facilities planning process.	By Q4	Nothing to report.
	Review webs for accessibility improvements and develop schedule for completing improvements.	Develop plan by Q3	Identified web forms in need of transition from PDF documents to online accessible formatting and developed schedule for their completion by Q4.
b. Key Messaging and Visual Brand Identity	Standardize highly visible District materials, including CIP signage for infrastructure projects, to expand service value awareness.	Template sign design complete by Q2	Template completed; signs will be in production and use beginning in Q3.
d. Data-Driven Targeted Water Efficiency Outreach Campaigns	Implement seasonal water efficiency campaigns that target higher water users and support pilot AMI deployment effort.	Ongoing	Published efficiency estimator calculator and launched corresponding campaign targeting high water users and “opportunity” zone users who have potential for further household water savings.
e. Creative Storytelling Campaigns and Techniques for Priorities and Initiatives	Develop creative collateral to broaden customer awareness of District’s work on key priorities and initiatives using public relations campaigns, interpretive signage, video, point-of-service displays, and events.	Q1-Q4	Nothing to report.
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.	Begin Q2 Begin Q3, then 1x per quarter	Nothing to report.

Objective 3 – Industry Engagement, Growth and Leadership

ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
----------------------------------	--------------------------------------	-----------	--------------------

a. Industry Associations	Captured in Goal 2, Obj. 4	---	Captured in Goal 2, Obj. 4b
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	District staff provided session presentations at two conferences in the last six months and an abstract on Marin Water dams was submitted to the Association of State Dam Safety Officials and has been selected for presentation at their September conference in Denver; abstract to be developed into white paper.
c. Stakeholder Collaboration and Communication	Develop stakeholder list and identify key contacts to connect with for ongoing relationship building and communications.	List by Q2-By Q4	Nothing to report.
Objective 4 – Technology, Innovation and Process Improvements			
ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	Q2 PROGRESS UPDATE
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.	In use district-wide by Q4	Microsoft Enterprise Agreement approved, beginning M365 rollout in Q3
d. Academia Partnerships	Develop a plan and schedule to engage with regional institutions such as UC Berkeley, Stanford, and/or others.	Q3	Nothing to report.
f. AMI Conversion and Associated Customer Portal	Captured in Goal 1, Obj. 1	---	Captured in Goal 1, Obj. 1
g. SAP Selection, Implementation & Operational Integration	Perform business capability modeling across all applicable departments to develop recommendation regarding upgrade vs. replacement of system. Perform needs assessment and develop Vendor Selection RFP (for ERP platform if recommendation to replace, and for Systems Integrator for implementation).	Begin Q1, Vendor Selection by Q4	Business capability modeling complete; recommendation to upgrade SAP approved. Vendor selection process for systems integrator will begin in Q3. Demos for Payroll and HR modules began in May.

