

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	WITHIN BUDGET OR FUNDS NEEDED
a. Water Efficiency Concepts and Strategies Toward Short and Long-Term Goals	Complete Water Efficiency Master Plan and begin implementation.	Publish by Q2	Within budget
b. Water Efficiency Incentives, Education and Outreach	Evaluate incentive offerings and revise to align with WEMP.	By Q2	Within budget
	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	Within budget
c. Implementation Of Water Loss Control and Leak Detection Program Recommendations	Complete water loss study and begin implementation of selected actions.	By Q4	Additional funds may be needed
d. Industry Association Participation	Participate in the Water Research Foundation’s Residential End Use Study.	By Q4	Within budget
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	Additional funds may be needed
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	n/a
	Align Water efficient Landscape Ordinance with the State rulemaking currently underway.	Q3	n/a
Objective 2 – Augment Existing Water Supply			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Roadmap Short-Term Actions	<ol style="list-style-type: none"> 1. Water Efficiency actions outlined in Objective 1. 2. Begin design and CEQA for Soulajule to Nicasio pipeline. 3. Design for Soulajule electrification. 	<ol style="list-style-type: none"> 1. Q1-Q4 2. Q4 	Within budget

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	<ul style="list-style-type: none"> 4. Design/bid Phoenix to Bon Tempe Treatment Plant. 5. Complete stream release project. 6. Develop emergency supply augmentation plan for times of water shortages. 	<ul style="list-style-type: none"> 3. Q4 4. Q3 5. Q4 6. Begin Q4 	
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	Additional funds may be needed
	Select preferred alternative for Local Storage and begin 30% design.	Preferred Alternative Selection by Q3; Award of contract for 30% design by Q4	Additional Funds may be needed
	Complete feasibility analysis for Petaluma River Desal.	By Q3	Additional Funds Needed
Objective 3 – Preserve and Enhance Existing Partnerships			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Recycled Water Project Partnerships	Continued relationship building work with North Bay Water reuse authority and local sanitation agencies.	Ongoing	Within budget
b. Sonoma Water Agreement Renewal	Key terms agreed to and signed.	Key terms agreed to by Q2; Signed by Q4	TBD
c. Relationship Building for Regional Water Supply Projects	Strategic meetings with Sonoma Water and contractors for regional water supply planning.	Ongoing	n/a
d. State And Federal Support for Regional Supply Development	Receive first tranche of WRDA funding for Soulajule water supply project.	TBD	TBD
Objective 4 – Provide High-Quality Water to Customers			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Reservoir Management Plans	Review industry best practices for reservoir management plans.	By Q4	N/A
b. Water Treatment Option Improvements	Pilot study to replace ammonia with liquid ammonium sulfate to improve safety protocols and cost-effectiveness.	By Q4	Additional funds may be needed
c. Water Quality Lab TNI Accreditation	Achieve new TNI accreditation for lab.	By Q4	Funds budgeted

GOAL 2: Resilient Water System

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Objective 1 – Infrastructure Condition Assessment			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Above Ground Facility Assessment	Initiate condition assessment process for remaining tanks and pump stations.	Begin in Q4	Funds needed (Est. \$300,000)
b. PRP Prioritization Process Review	Refine and bring to Board an updated process for prioritization.	Begin in Q3; to Board Q4	n/a
d. Workplace Facilities Plan	Complete facilities plan.	By Q3	TBD
e. Above-ground Infrastructure Hardening	Identify needs to be included into the capital planning effort.	Complete by Q3	n/a
f. Water System Single Points of Failure Assessment/CIP Incorporation	Begin assessment to integrate into CIP effort.	Begin in Q4	n/a
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 in Q4	n/a
h. Water System Master Plan	Complete and use information from the WSMP to identify and prioritize infrastructure capital replacement projects.	Complete in Q3	Within budget
Objective 2 – Capital Planning			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
b. Project Grant Opportunities	Staff will continue to identify grant funding opportunities that are a fit for the Districts capital projects.	Ongoing	n/a
c. Bond Funding Opportunities for Generational Projects	Captured in Goal 4, Objective 4b.	---	---
Objective 3 – Capital Project Delivery			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Resource Needs Assessment	Develop resourcing plan for enhanced CIP, including reallocation of existing positions leveraged with external support.	Complete by Q2	n/a
c. On-Call Engineering Firm Consulting Contracts	Execute on-call engineering contracts for specialty support.	Complete in Q3	Funds needed (est. \$3M)
f. Paving Restoration Requirements	Complete pavement assessment criteria with paving expert and begin discussions with neighboring jurisdictions.	Complete assessment & begin meetings by Q4	Within budget

Objective 4 – Operations & Maintenance			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Standard Operating Procedure Development	Review/update or develop SOPs. Select 10 of the highest priority SOPs to update this year.	Complete in Q4 2024	Budgeted
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.	TBD
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	TBD
Objective 5 – Energy Planning			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
c. Carbon Neutrality	Initiate carbon neutrality policy discussion with the Board.	Begin by Q4	n/a
d. Micro-Turbine Technology	Take another look at possible locations in transmission and distribution system for next-gen micro turbine.	Begin in Q4	TBD
e. Renewable Power Opportunities	Work with Board on renewable energy goals/policy.	Q3	---
Objective 6 – Emergency Response Readiness			
ACTION ITEMS FOR 5 YR OBJECTIVES	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
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	n/a
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	n/a
c. Dam EAP Review and Tabletop Exercises	Review EAP contact information.	Q1	n/a
d. Emergency preparedness training w/ Marin County OEM	Participate in County Office of Emergency Mgmt monthly meetings.	Ongoing	n/a
e. FEMA-compliant Contracts for Disaster Recovery Needs	Develop FEMA compliant contract templates that will be ready to use following emergencies.	Complete Q3	n/a
f. Risk Reduction Assessments	Water system single points of failure assessment (outlined in obj. 1).	Begin Q4	n/a

GOAL 3: Watershed Stewardship

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Objective 1 – Creek Restoration			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Lagunitas Creek Restoration	Secure resource agency permits to begin implementation of Phase 1 restoration sites (1-6 and 12-13).	Initiate construction Q3	Grant Funded
	Complete restoration construction of 3-5 sites of the 8 sites in Phase I.	Complete construction Q4	Grant Funded
b. Lagunitas Creek Stewardship Plan	Update Lagunitas Creek Stewardship Plan.	Complete Q4	Within budget
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	Within budget
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	n/a
Objective 2 – Watershed Resiliency to Wildfire			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Public Safety Partnerships	Coordinate 2-3 inter agency trainings for search and rescue and wildfire training.	Complete by Q4	Within budget
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	Budgeted/ Grants
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	Budgeted/ Grants
d. Workforce Development	Secure grant funding for CCNB crews to carryout BFFIP work and support forest ecology crew training	Complete by Q4	N/A
	Secure grant funding for CCC crews to carryout trail work.	Complete by Q4	N/A
	Contract with Marin County Fire Foundry Program to support early career development.	Complete by Q2	Within budget/ Grants
	Apply as a site sponsor to secure AmeriCorps Grizzly Fellow and Watershed Stewardship Program participants for 2025.	Complete by Q4	Within budget

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e. Wildland Firefighting and Vegetation Equipment	Add one additional Ranger Vehicle to fleet to support increased staff.	Complete by Q3	Additional funds needed
	Add 1-2 additional UTV's to support Ranger Trainee field work.	Complete by Q3	Additional funds needed
Objective 3 – Stewardship			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Annual Biological Monitoring	Contribute biological monitoring data and staff expertise to update of One Tam Peak Health Report.	Complete by Q4	N/A
b. Regional Partnerships	Update One Tam Strategic Plan, Annual Work Plan and MOU.	Complete by Q2	Within budget
c. Regional Restoration Opportunities	Contribute staff expertise to complete Golden Gate Biosphere Network Climate Vulnerability Study.	Complete by Q4	N/A
d. Stewardship Programs	Host trail maintenance training for seasonal staff and Ranger trainees to build capacity for volunteer trail stewardship work.	Complete by Q4	Within budget
	Launch a monthly trail maintenance and stewardship program to engage community members, non-profits and youth teams in watershed stewardship.	Complete by Q4	Within budget
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	Additional funds need to be identified.
	Host quarterly watershed hikes and/or community events.	Complete by Q3	Within budget
Objective 4 – Recreation			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
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	Additional funds need to be identified.
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	Grant/Budget for Phase II; Additional funds need for Phase I
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	Within budget

Objective 5 – Facilities			
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
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	Additional funds need to be identified.
	Develop priority list of visitor amenity improvements.	By Q4	Additional funds need to be identified.
b. Integrate Watershed Facilities into Master Planning Process	Explore opportunities for outdoor education and engagement facility.	By Q4	Additional funds need to be identified.
c. Watershed Housing	Identify priority facilities updates at Sky Oaks Ranger Station.	By Q4	Additional funds need to be identified.
	Evaluate improvements to existing watershed housing assets.	By Q4	Additional funds need to be identified.

GOAL 4: Fiscal Responsibility

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Objective 1 – Financial Stability			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
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)	n/a
b. Long-Term Capital Improvement Program with Stable Investments	Provide financial support for development of CIP.	Q4 – budget preparation	n/a
c. Non-Rate Revenue Updates	Evaluate non-rate revenues (e.g. parking fees, cell tower leases) and update for FY 26.	Q4 – budget preparation	n/a
Objective 2 – Fair, Equitable and Proportional Rates			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
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	n/a
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	n/a
Objective 3 – Cost-Effective Business Processes			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. SAP Update to Streamline Processes and Improve Analytics	Develop business case and complete vendor selection process.	By Q4	Within budget
b. Leverage External Resources for Efficiency	Evaluate resources, including the right balance of internal and external, to support CIP.	Q4	TBD
c. AA or Better Credit Quality Rating	Review with credit agencies the state of the District as part of credit rating process.	Q1	Within budget
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	n/a
Objective 4 – Outside Funding to Reduce Financial Impacts on Ratepayers			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. WRDA Funding for Water Supply Projects	Receive first tranche of WRDA funding for Soulajule water supply project (also in Goal 1, Obj. 3b).	TBD	TBD

b. Bond Funding	Begin work of bond funding for near-term selection of projects.	Q4	Within budget
c. State and Federal Grants	Identify priority projects and programs that are competitive for state and Federal funding opportunities and submit grant applications.	Q4	N/A
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	N/A
Objective 5 – Financial Transparency			
5 YR ACTION ITEMS	WORK PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Online Customer Tool Improvements	Develop more interactive and informative bill estimator.	Launch tool by Q2	Within budget
b. Bi-annual fiscal policies review	Conduct internal review and update to financial and purchasing policies.	Present to board by Q4	n/a
c. Quarterly Financial Summary Publication	Develop quarterly financial statement and post to public website.	Publish quarterly statement by Q4	n/a
d. Regular Internal and External Financial Audits	Conduct external financial audit and identify internal audit focus areas.	Identify internal audit areas by Q4	Within budget
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	n/a

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	WITHIN 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.	Complete by Q3	n/a
	Refine recruitment collateral to maximize potential reach across various recruitment platforms to attract diverse applicant pools.	Launch in Q1	Within budget
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	Within budget
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	Within budget
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	Within budget
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	n/a
g. Strengthened Internal Communication Strategies	<i>In an effort to strengthen alignment, coordination and awareness in the organization on timely and key initiatives and/or issues, launch internal newsletter.</i>	Launch first issue by Q4	n/a
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.	n/a
i. Workplace Safety	Assess and evaluate the District’s Safety Program and identify key initiatives to strengthen and enhance the reach of the program.	Q4	Funds needed
	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	Funds needed
j. Work Facilities Assessment and Evaluation	Incorporate into Worksite Facilities Plan.	By Q4	Within budget
k. Staffing Assessment	Develop Districtwide list of internal resource gaps and opportunities.	Q4	n/a

Objective 2 – Customer Experience			
ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
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	Within budget
	Review webs for accessibility improvements and develop schedule for completing improvements.	Develop plan by Q3	Within budget
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	n/a
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	Within budget
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	Within budget
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, then 1x per quarter	n/a
Objective 3 – Industry Engagement, Growth and Leadership			
ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	WITHIN BUDGET OR FUNDS NEEDED
a. Industry Associations	Develop an Operations and Maintenance departmental team to represent the District in competitive water-industry challenges at the regional, state and national levels.	Team assembled by Q2	n/a
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	Within budget
c. Stakeholder Collaboration and Communication	Develop stakeholder list and identify key contacts to connect with for ongoing relationship building and communications.	List by Q2	n/a
Objective 4 – Technology, Innovation and Process Improvements			
ACTION ITEMS FOR 5 YR OBJECTIVES	STRATEGIC ELEMENTS PLANNED IN YEAR 1	MILESTONE	WITHIN 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.	In use district-wide by Q4	Within budget
d. Academia Partnerships	Develop a plan and schedule to engage with regional institutions such as UC Berkeley, Stanford, and/or others.	Q3	n/a
f. AMI Conversion and Associated Customer Portal	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	Within budget