

MISSION SPRINGS WATER DISTRICT

Strategic Plan

January 2024

Executive Summary

The Mission Springs Water District's 2024 Strategic Plan outlines a focused roadmap for efficient water management and community service. Building on a 70-year legacy, the plan aligns with MSWD's mission to provide, protect, and preserve water resources.

Key Elements:

- **Historical Evolution:** From a one-square-mile entity in 1953 to 135 square miles today, MSWD has expanded infrastructure and services to over 44,000 residents.
- **Mission and Vision:** MSWD's mission is clear - to provide, protect, and preserve water. The vision emphasizes trust-building, employee empowerment, customer-focused service, environmental stewardship, and public health.
- **Values:** Accountability, leadership, professionalism, and service form the foundation of MSWD, guiding decisions and fostering a culture of excellence.
- **Strategic Focus:** The 2024 plan is a dynamic action-oriented document, prioritizing efficient leadership, management, and operational excellence. It serves as the pinnacle planning guide for the organization.
- **Commitment to Excellence:** The Board of Directors and staff are committed to exceeding customer expectations, ensuring MSWD remains dedicated to excellence and envisions a sustainable future for water resources.

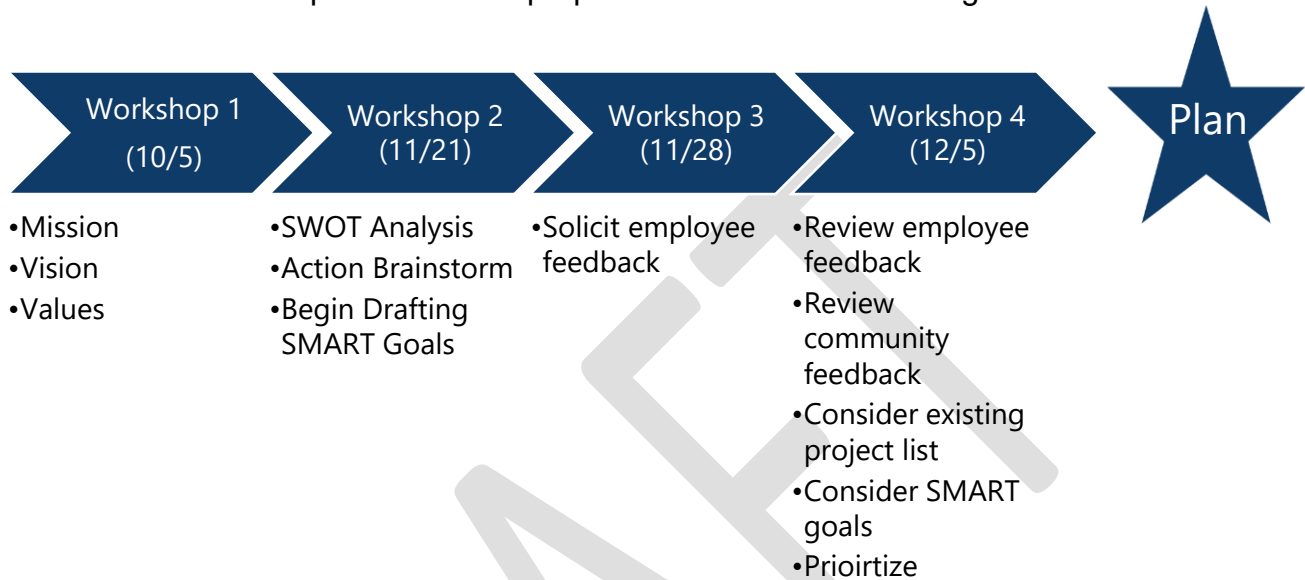
In essence, the MSWD Strategic Plan is a forward-looking blueprint that underscores the district's commitment to responsible water management and community service, guided by a clear mission, vision, and set of values.

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The Mission Springs Water District Strategic Plan

This document represents the strategic plan of the District, incorporating valuable insights from the Board of Directors, dedicated staff, and the community we are committed to serving. The overall process of the development of our strategic plan included four workshops with distinct purposes as described in the figure below.



Our strategic plan serves as the overarching guide, ensuring that every action, activity, and decision aligns with our vision and upholds our mission. This framework is designed to enhance the efficiency of leadership, management, and overall District operations.

A strategic plan stands as the pinnacle planning document for our organization. It establishes the foundation upon which all other organizational, operational, financial, and resource planning efforts are built, emphasizing its paramount significance.

Historical Perspective and Future Outlook

In 1953, the Desert County Water District, endorsed by a resounding vote of 246 to 9, laid the groundwork for what would eventually become the Mission Springs Water District. Governed by Subsection 30000 et seq. of the California Water Code, MSWD is overseen by a five-member, publicly elected Board of Directors.

From its modest beginnings covering one square mile, MSWD has expanded to encompass approximately 135 square miles, serving a population exceeding 44,000 residents. The District exercises statutory authority over water supply, catering to the needs of both residential and commercial customers.

Starting with 100,000 feet of pipelines, five water wells, and two reservoirs, MSWD has evolved significantly. The District now boasts over 1.25 million feet of pipelines, 13

water wells, 12 booster stations, and 24 reservoirs. The District serves Desert Hot Springs, North Palm Springs and several unincorporated areas of Riverside County.

As a testament to our commitment over the past 70 years, MSWD has diligently managed groundwater through conservation, protection projects, and general stewardship. Our 13,880 water accounts rely solely on groundwater, a responsibility we approach with dedication and care.

Complementing our water services, MSWD currently manages 9,719 sewer connections. Wastewater treatment is conducted at the Horton Wastewater Treatment Plant, the Desert Crest Wastewater Treatment Plant, and the almost complete Nancy Wright Regional Water Reclamation Facility. In total, the District treats approximately 2 million gallons of wastewater per day before returning the treated water to the aquifer.

Our strategic plan for 2024 builds upon the achievements of the 2017 plan, considering the rich history, current strengths, weaknesses, opportunities, and threats. It is not merely a document but a dynamic action plan that propels MSWD forward, ensuring our continued success in providing, protecting, and preserving our most vital resource — Water!

The Board of Directors and staff, recognizing the high expectations of our customers, stand ready to surpass them through the implementation of this strategic plan. MSWD remains steadfast in its commitment to excellence, driving towards a future where water remains a sustainable and cherished resource for all.

MSWD Mission

Our Mission at MSWD encapsulates the core function and intrinsic value that defines our existence. It is a simple yet robust statement, articulating our fundamental purpose and the reasons that drive our daily endeavors.

We provide, protect, and preserve our most natural resource . . . Water!

MSWD Vision

Our Vision at MSWD serves as a compass, charting our course toward a future state that reflects our aspirations and commitment to excellence. It encapsulates not just what we aim to become but envisions the success we strive for and the positive transformations we aim to bring to all those we serve.

- **Trust:** Our vision at Mission Springs Water District is to build a trusting community through open communication, accountability, collaboration, and mutual respect among the Board of Directors, staff, and our customers.
- **Employees:** Our vision for Mission Springs Water District employees is to cultivate a workplace where each person is empowered as a steward of our community's water, fostering a culture of excellence, innovation, and service in alignment with our shared mission.

- **Customers:** Our vision for Mission Springs Water District is to deliver reliable, sustainable, and community-focused service to our customers, ensuring you can trust us to meet your water needs while contributing to a healthier, vibrant community.
- **Environment:** Our vision for the natural environment in Mission Springs Water District is harmonious coexistence through responsible management, aiming to be a model for environmental stewardship and sustainable practices, ensuring the health and vitality of our local ecosystems.
- **Public Health:** Our vision for Mission Springs Water District is to serve as a cornerstone of community well-being by providing reliable and safe water services that protect and support a healthy and thriving community.

MSWD Values

Our Values at MSWD stand as the bedrock of our organization, shaping how we work and defining who we are. These guiding principles not only clarify our identity but also serve as a compass for our purpose, culture, and decision-making processes.

- **Accountability:** We are accountable for our actions, committed to transparency, integrity, and rectifying mistakes, ensuring the District's operations are conducted with honesty and responsibility.
- **Leadership:** Leadership is a core value for us, representing a commitment to setting a positive example, inspiring others, and fostering innovation to address water management challenges and drive progress in our community.
- **Professionalism:** We maintain the highest standards of competence, ethics, and integrity in our actions, delivering water services with accountability and respect for the community, ensuring professionalism and expertise in every operation.
- **Service:** We ensure access to clean, reliable water and cultivate a positive, supportive, and respectful environment for our staff, recognizing that community well-being and employee satisfaction are integral to achieving our mission.

Strengths, Weaknesses, Opportunities, and Threats (SWOT) Analysis

MSWD's Board and staff conducted a SWOT analysis, assessing internal strengths and weaknesses, along with external opportunities and threats. This visual breakdown below guides our understanding: strengths (internal positives), weaknesses (internal areas for improvement), opportunities (external positives), and threats (external challenges).

	Positive	Negative
Internal	S	W
External	O	T

The details of the SWOT analysis are found in Appendix A.

Actions

Following the SWOT analysis, the Strategic Plan Team separated into groups to brainstorm action steps that could be taken. Four groups worked on developing lists of ideas, then each presented their ideas to the full team.

These actions became the basis for SMART goals described below.

Employee feedback

MSWD hosted an “all hands” meeting where all employees were invited to learn more about the Strategic Plan and provide feedback on the direction it was going. Strategic Plan Team members presented the work and results to date and asked for feedback. Several changes to the vision and values statement were made as a result.

Employees shared that they generally agreed with the results of the SWOT analysis and emphasized the need to focus on internal communications, suggested that flood control and stormwater capture could be opportunities, and highlighted the State of California’s new recycled water and Chromium 6 regulations as potential threats.

Employees weighed in on potential actions as follows:

- Recycled water should be given a high priority.
- Processes and procedures should be a priority and can be combined with cross training.
- An intranet could be used for several things on the list and address several weakness/threats.
- Regarding the new software for accounting, the focus has been an “all in one” software but employees would be accepting of a new program if they solve 2/3 of the District’s needs.

Employees also provided additional actions as follows:

- Youth development programs such as education in schools, vocational/college certificate programs, or internships
- Holding vendors to the same standards as staff, as they are extensions of staff
- Expanding rebate and conservation programs
- Explore opportunities for water recovery/water banking: saving rainwater.
- Enhancement of the District's "right fit" interviews to ensure quality candidates are being hired.

Themes

Based on the SWOT analysis, the actions, and employee feedback, staff, and the MSWD Board identified key themes that are essential for our sustainable growth and effective service delivery. The Board also considered current, ongoing projects identified in the 2017 Strategic Plan. This list is available in Appendix B.

Through this discussion several themes emerged. These themes strategically align with our strengths with opportunities, address weaknesses, and mitigate threats. Serving as a compass for decision-making and resource allocation, they guide our operational enhancements, allowing us to fulfill our mission. This prioritization ensures a focused and targeted approach with optimal impact. As SMART goals were developed, they were categorized into themes.

Following are our themes:

- Internal Communications for Employees
- Deliberate Customer Education
- Financial Management
- Improved Technology and Process
- Water Supply

Specific, Measurable, Achievable, Realistic, and Timely (SMART) Goals

SMART goals represent the tangible outcomes and achievements we aspire to accomplish. Serving as beacons of direction and purpose, these goals provide clarity for our activities, shaping a path towards success.

Our SMART goals directly stem from the insights of our SWOT analysis. While a SWOT paints a picture of "what" needs attention within a timeframe, SMART goals become the actionable "how" to address the identified areas of focus.

Each SMART goal is accompanied by specific actions and activities, forming a detailed plan of action. Referred to as initiatives or projects, these components outline the intricate steps required to achieve the overarching SMART goal.

The beauty of SMART goals lies in their precision. They not only articulate the desired outcome but also outline the specific actions necessary for successful implementation. This approach ensures that our efforts are targeted, measurable, and aligned with our strategic objectives.

In essence, each SMART goal, with its associated initiatives, is a blueprint for success. It guides our teams in translating strategic priorities into actionable steps, driving purposeful action towards the realization of MSWD's mission and vision.

Our commitment to SMART goals reflects our dedication to strategic planning, effective implementation, and continuous improvement for the benefit of the communities we proudly serve.

Strategic Plan Implementation

Effectively using, updating, and tracking the implementation of a strategic plan is crucial for its success. Now that SMART goals have been established and a blueprint has been created, the following steps describe implementation:

1. Create an Implementation Team at Staff Level:
 - Each SMART goal has a dedicated team responsible for overseeing the implementation of the SMART goal and updating the plan as necessary. As staff changes occur, it will be critical to ensure all roles remain filled for each goal.
 - The implementation team should conduct regular meetings to discuss achievements, challenges, and adjustments and use these meetings to reinforce commitment and address issues promptly.

2. Communicate the Plan:
 - The Board of Directors, General Manager, and staff are responsible for clearly communicating the strategic plan to all employees, impacted agencies/organizations, and other impacted parties. Some of this can occur through informational email but other aspects will require meetings or other events to solicit input or feedback. Each Implementation Team can make those determinations as needed.
 - The Board of Directors and staff understand the importance, how it will drive decision-making, and how periodic review and adjustment is necessary to address evolving strengths, weaknesses, opportunities, and threats. It will be important to review this information with new, incoming staff and leadership.
 - Communicate how each Board member and every employee has a role in the success of the plan and thus MSWD.

3. Regularly Review and Update the Plan and SMART Goals:

- Each SMART goal has actionable steps associated with its implementation (see Appendix B). During MSWD’s management meetings, Implementation Team leaders or representatives should report on the progress of achieving those steps.
 - At those times, staff can update the goals and their actions as needed to adapt to changing circumstances.
 - When a SMART goal is completed, the implementation team can develop the next SMART goal required to meet the priorities identified in this plan.
 - Each quarter, MSWD leadership will schedule a Board of Directors review session to report progress and recommendations for updates/changes.
4. Celebrate Milestones with Staff and Board Members:
 - Acknowledge and celebrate achievements, no matter how small as recognition boosts morale and motivates the team.
 5. Seek Feedback:
 - Encourage open feedback from team members and stakeholders to refine goals, strategies, actions and improve implementation.
 6. Document and Share Learnings:
 - Document lessons learned during the implementation process.
 - Share insights to enhance future planning and implementation efforts.
 7. Continuous Improvement by All:
 - Embrace a culture of continuous improvement.
 - Regularly assess the SWOT, strategies and goals and adjust as needed.
 8. Regularly Report Progress:
 - Provide regular updates to stakeholders through the intranet, website, social media, YouTube, and other tools available to MSWD.
 - Transparent reporting builds trust and keeps everyone informed.
 - Provide information as goals are completed and next steps are developed.
 9. Incorporate the Strategic Plan Elements in other work:
 - The annual budget should align with the themes in this Strategic Plan.
 - Capital Improvements Plan priorities should include consideration of the Strategic Plan.

By adhering to these steps, MSWD ensures a structured and effective approach to the implementation, updating, and tracking of progress in our strategic plans. This iterative process not only promotes adaptability but also fosters a culture of continuous improvement, laying the foundation for our long-term success. At MSWD, we are committed to the dynamic evolution of our strategic initiatives, aligning with our mission to provide, protect, and preserve our most vital resource — water — for the communities we proudly serve.

In order to support continued progress to the Mission, Vision, and Values described in this plan, the Strategic Goals in the next section should be considered starting points. As each goal is completed, staff on the implementation team should develop a next step goal using the tools provided. The next step goal should be a SMART goal that moves the District forward. As goals are achieved, the success and lessons learned should be documented and discussed in the development of the next goal and should be shared during the progress reports.

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SMART Goal #1:

Mission Springs Water District will hire and/or designate a qualified individual that will manage a grant program. The person will be responsible for managing and securing grants related to water management and related issues. The selected candidate is expected to assume the role no later than April 1, 2024.

Much of the discussion of the District's priorities involved capitalizing on opportunities to receive grant funding. Funding from a variety of sources, including state and federal government, are available but require detailed technical applications and agreements, a grant manager will be valuable in supporting the District in achieving other goals. Therefore, this goal is fundamental in the implementation of this strategic plan. The need for this goal is tied to the following priorities:

- **Enhanced Operational Efficiency:** Having a “point person” in charge of grant programs will centralize knowledge of District needs, opportunities, and active applications to ensure that MSWD can efficiently apply for and receive grant funding.
 - **Impact:** Understanding various MSWD grant needs and applications will allow for a more streamlined and efficient process of participating in grant program.
- **Resource Optimization:** The District's use of consultants for this work has been successful but efforts could be optimized by having an in-house expert manage grant program needs.
 - **Impact:** Creating an in-house resource for grant management will increase the level of expertise and streamlining incorporated into grant program tracking and applications.
- **Financial Management:** Much of the District's financial plan relies on grant funding. By hiring or designating a grant manager, the District can prioritize securing these funds.
 - **Impact:** Securing grant funding will have a major impact on financial management for the District in maintaining low rates and reducing the need for financing programs.
- **Customer Service Improvement:** Securing grant funding can reduce rate-payer costs on various projects and programs.
 - **Impact:** Grant funding will assist the District in keeping costs low, therefore avoiding rate increases for customers.

Identifying the responsibilities of a grant manager and identifying that person will have a ripple effect on projects throughout the District. A higher level of grant applications success will ensure critical projects are able to move forward and customers are not impacted financially by those needs.

SMART Goal #2:

Mission Springs Water District will finalize its financial plan and initiate the implementation of its recommendations, aiming to enhance fiscal sustainability and ensure effective resource allocation in alignment with organizational objectives by July 1, 2024.

The District has invested resources into developing a financial plan and will work toward incorporating the recommendations to meet all the District's priorities and ensure long-term financial health. All components of the District's operations rely on sound financial management and key priorities include:

- **Financial Management:** Sound financial management is critical to the District's ability to operate. Ensuring that the financial plan is implemented will provide sustainable financial management into the future.
 - **Impact:** The District will be fiscally sound and operate in alignment with the financial plan.
- **Customer Service Improvement:** Incorporating the recommendations of the financial plan will allow the District to ensure customer rates are appropriate and reasonable.
 - **Impact:** Sound financial management will allow the District to keep rates affordable and avoid the impact of large rate increases to customers.
- **Resource Optimization:** The financial plan describes resource allocation and identifies strategies for successful management.
 - **Impact:** Implementing the recommendations of the financial plan will contribute to management of resources in a way that maximizes efficiency throughout the District's operations.
- **Data-Driven Decision Making:** The financial plan recommendations are thoroughly researched actions based on the District's financial data.
 - **Impact:** By incorporating the recommendations, the Board can be sure that their actions reflect the needs of the District based on sound data.

The District's commitment to the financial plan is an important step in sustainable and efficient operations. Implementation of the recommendations in the plan align with many of the opportunities outlined in this Strategic Plan.

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SMART Goal #3:

By July 1, 2025, the Mission Springs Water District will identify and address workflow inefficiencies by implementing technology solutions, resulting in a measurable improvement in process efficiency and resource utilization.

In response to the evolving demands and challenges faced by the Mission Springs Water District, the imperative for addressing workflow inefficiencies through technological advancements becomes crucial. This need was elevated through the SWOT analysis and employee feedback; thus, the Board of Directors identified this goal as a priority. Several compelling reasons underscore the necessity of this goal including:

- **Enhanced Operational Efficiency:** Streamlining workflows through technology integration will enhance overall operational efficiency.
 - **Impact:** This will lead to quicker response times, reduced bottlenecks, and a more agile response to changing demands.
- **Resource Optimization:** Identifying and rectifying inefficiencies will optimize the use of resources, both human and material.
 - **Impact:** Improved resource utilization will contribute to cost-effectiveness, allowing the district to allocate resources more effectively.
- **Adaptation to Technological Advancements:** Embracing technological solutions aligns the District with industry best practices and modern standards.
 - **Impact:** Staying abreast of technological advancements ensures the District remains competitive, resilient, and prepared for future challenges.
- **Customer Service Improvement:** Streamlined processes enable better customer service by reducing delays and errors.
 - **Impact:** Enhancing customer satisfaction and trust in the water District's services.
- **Data-Driven Decision Making:** Implementing technology solutions facilitates data collection and analysis.
 - **Impact:** Informed decision-making based on real-time data will contribute to strategic planning and improved long-term outcomes.

By addressing these aspects, the District aims to not only meet its immediate operational needs but also to future-proof its processes, ensuring sustainable and effective water management for the community. This comprehensive approach reflects a commitment to excellence, innovation, and the continued delivery of high-quality services.

Insert cover divider: **Internal Communications for Employees**

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SMART Goal #4:

By September 2026, the Mission Springs Water District will complete the construction of a Critical Service Center which will foster increased collaboration, communication, and teamwork among employees working at one central location. This initiative aims to drastically improve morale by enhancing overall efficiency and cohesion within the organization.

During the Strategic Planning process, challenges related to internal communications were identified repeatedly. Many of these challenges were linked to operational silos. A centralized operations center to house all critical services would be a major step in addressing these issues, therefore resolving some of the weaknesses from the SWOT analysis. A number of concerns can be addressed by this goal including:

- **Enhanced Operational Efficiency:** Improved internal communications will increase operational efficiency by creating a better understanding of priorities, tasks, schedules, and integrated efforts.
 - **Impact:** By creating a centralized Critical Service Center, employee communications can reduce duplication of effort and/or unintended consequences of actions, therefore improving efficiency in all aspects of the District.
- **Resource Optimization:** Centralizing operations will allow for sharing resources and increasing collaboration between departments.
 - **Impact:** Increased collaboration and the incorporation of shared resources will improve cost-effectiveness and full utilization of resources.
- **Improved Employee Morale:** A new Critical Services Center will improve the cohesiveness of the organization and nurture a team atmosphere.
 - **Impact:** Improved morale will increase employee satisfaction and retention and help develop a more collaborative work environment.
- **Customer Service Improvement:** Providing all services in one location will allow customer service to be centralized and will allow greater communication between departments to ensure customer needs are addressed.
 - **Impact:** Improve customer satisfaction via enhanced employee communication will help develop additional confidence in the District from the community.
- **Adaptation to Technological Advancements:** Centralizing operations will allow for new technology to be adopted District-wide at the same time, reducing the resources required for on-boarding technology.
 - **Impact:** Efficiency adapting to new technologies will provide more cost effective and streamlined change.

Implementation of this SMART goal will demonstrate to the employees that their concerns about internal communications were taken seriously. This goal ties to the priorities identified by the Board, Strategic Planning Team, and employees and successful completion of this goal will address key items identified throughout this plan.

Insert cover divider: **Water Supply**

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SMART Goal #5:

By April 2025, the Mission Springs Water District will thoroughly evaluate and present viable options for implementation of diversified water supply exploring opportunities such as recycled water and stormwater, to ensure sustainable and reliable water provision for its customers.

Water supply is of the utmost importance to the District. Throughout the strategic planning process, several types of concerns about water supply were identified and securing long-term water supply is a critical priority of the District. This goal is intended to strategically investigate water supply options that the District can implement. Several compelling reasons underscore the necessity of this goal including:

- **Water Supply Security:** MSWD's mission is to provide, protect, and preserve our most natural resource . . . Water! The strategic exploration of water supply options is critical to long-term sustainability and aligns with the District's core mission.
 - **Impact:** By evaluating and implementing diversified water supply strategies, the District will provide long-term sustainability to its customers, fulfilling its mission.
- **Data-Driven Decision Making:** This goal will result in a detailed analysis of a variety of water supply options, allowing leadership to make informed decisions related to water supply options.
 - **Impact:** Understanding the details of water supply options via quality data will allow for sound actions by the Board of Directors in pursuing water supply opportunities.
- **Customer Service Improvement:** Ensuring a long-term water supply is imperative to service customers.
 - **Impact:** The District's prioritization to securing water supply will ensure customers can trust MSWD to meet their water supply needs in perpetuity.
- **Financial Management:** A thorough analysis of water supply options will include a review of costs associated with each option, better allowing the District to conduct financial planning.
 - **Impact:** Incorporating water supply costs into financial planning will help the District prepare for large-scale costs and pursue funding assistance.

Thoroughly exploring water supply options to plan for the future will support the District in achieving its mission and will position the District to secure supplies as they are available. This goal is critical to the future of the District and will have a significant impact on long-term planning.

Insert cover divider: **Deliberate Customer Education**

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SMART Goal #6:

By the end of the first quarter of 2024, Mission Springs Water District will identify and design an annual plan to increase outreach and engagement with its customers, leveraging various communication channels, technologies, and community events, with the objective of enhancing customer trust, satisfaction and understanding of water services. The District will begin to implement these strategies in the second quarter of 2024 and will annually refine the communications plan and its goals.

Part of the District's vision is to enhance customer trust. The District included the following vision statement in this plan: Our vision for Mission Springs Water District is to deliver reliable, sustainable, and community-focused service to our customers, ensuring you can trust us to meet your water needs while contributing to a healthier, vibrant community. To achieve this vision, this SMART goal is critical. Other benefits of incorporating this goal include:

- **Customer Service Improvement:** When customers better understand what the District does and how it operates, they will recognize the work MSWD does to protect and provide water services.
 - Impact: Enhancing customer education will increase trust in the water District's services.
- **Improved Recognition and Familiarity:** Many customers do not know who their water district is or what services it provides. Educating customers on this will increase their recognition of MSWD and its role in the community.
 - Impact: Familiarity with MSWD and its role will increase public trust.
- **Resource Optimization:** A better relationship with the public will help the District understand public needs and desires.
 - Impact: The District will be better able to allocate resources to the needs of its customers.
- **Internal Communications:** Deliberate customer outreach also has a ripple effect of educating employees about the District.
 - Impact: Employees can serve as stronger ambassadors for the District helping to created and strengthen relationships with customers.

A strategic effort to enhance outreach and engagement directly correlates to the District's vision statements, which are focused on trust. Because MSWD has a positive and progressive story to tell the public, this enhanced effort will educate customers while creating greater satisfaction throughout the community.

Appendix A: SWOT Analysis and Results

The following is the raw data from our SWOT analysis. This information can be of value in defining future priorities and SMART goals.

Strengths:

- Response time to customers
- Quality staff/staff emergency response
- Public Communications/outreach/strong bonds in the community
- Strong leadership/new leadership/board vision/desire to improve/engaged management
- Award-winning water/water quality
- Groundwater protection
- Financial stability
- Conservation
- Benefits/competitive pay/interesting work/low turnover
- Formal work processes/workflow
- Water/sewer system maintenance program
- Growing community infrastructure

Weaknesses:

- Need to better prioritize
- Infrastructure/old building and facilities
- Physical silos
- Internal communications
- Record keeping
- Customer confidence/customer follow through
- Holding vendors and contractors accountable
- Chrom-6
- Power supply back ups
- Slow processes/need to modernize
- Revenue – fixed charge and property taxes
- Not always proactive
- Lack of recharge for aquifer/source of supply
- Water/sewer system maintenance program
- Knowledge loss from retirement/weakened staff levels
- Outdated ERP/lack of data analysis/customer account errors
- Timecards/payroll
- Technology gaps/use of all SCADA features/outdated software's

Threats:

- Outdated technology/manuals/plans
- Copper theft

- Customers unable to pay bills/pressure on rates/disadvantage community rate base
- Security threats (Cyber, vandalism)
- SGMA (DWA)
- DWA
- Legislative/regulatory (crhom-6, PFAS, conservation)
- Natural disasters (climate change, earthquakes, storms, statewide water shortages)
- Concerns with long-term health of the city
- Wholesaler increased costs that effect rates
- Economy
- Supply chain disruptions
- Real estate crash
- Customer trust
- Development/growth
- Loss of Colorado River Water/no ability to get MET allotment
- Talent shortage with specialized water industry credentials
- Political influence/litigation
- Social media/negative posts
- Aging infrastructure/leaks

Opportunities:

- Infrastructure/devices
 - Surge anticipator valve
 - Weather stations
 - Site cameras
 - Tank mixers
 - Tank headspace ventilators
 - Flow metering/bi-directional flow meters
 - Pre-treatment program
- New technology
- Recycled water/nonpotable
- Employee retention programs/DEI initiatives/employee training/team building
- Transparency
- Communications/PR
- Secondary internet access
- Internal communications (who is on-call)
- Technology/AMI/customer portal/employee portal
- On-site electrician
- Grant funding opportunities
- Budget tiered rates/rate structure
- Community growth

Appendix B: 2017 Strategic Plan Project List

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2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

STRATEGIC GOAL # 1 – WATER SUPPLY

NO.	PRIORITY	PROJECT DESCRIPTION	DEPARTMENT ASSIGNED	STATUS
1	A	Develop an integrated water supply plan to identify and evaluate alternatives to diversifying the Districts existing water supply and decrease reliance on imported water. The plan should include a financial impact analysis and delivery options.	Administration	Completed (2021) Mission Creek Basin Groundwater Sustainability Plan with DWA and CVWD
2	A	Conduct a feasibility study and cost analysis providing additional treatment options for imported water supplies from the Colorado River to alleviate future concerns with increased levels of Total Dissolved Solids (TDS).	Engineering	On-Going SNMP did not show a significant increase in TDS as expected
3	A	Coordinate with the Coachella Valley Water District and Desert Water Agency on an evaluation to enhance existing hydrologic studies of the ground water basins the District relies on for current and future production. The evaluation will consider issues such as aquifer storage potential, groundwater quality, and the location of geologic faults, storage capability and groundwater movement. Approval of the evaluation study is contingent on completion of the SGMA process.	Administration / Engineering	Completed (2021) Mission Creek Basin Groundwater Sustainability Plan with DWA and CVWD
4	A	Evaluate opportunities with the Agua Caliente Indian Reservation to access groundwater within the Indio and San Gorgonio Pass basins.	Administration	On-Going MOU has been signed
5	A	Initiate discussions with the Desert Water Agency and other wholesale and retail water providers, as well as private parties of interest to formulate a regional groundwater management structure and strategy. Options include: formulation of a joint powers agency, adjudication or other management/political body. Identify strategies and agreements for imported water, production rights, enhancing ground water quality, and fees and budget administration.	Administration	Completed (2021) Mission Creek Basin Groundwater Sustainability Plan with DWA and CVWD
6	B	Modify existing water distribution system to incorporate production of groundwater from the Indio and San Gorgonio Pass Sub-Basins directly into the Districts system.	Engineering	On-Going Water Master Plan will include projects connecting the IDE areas to the “main” system
7	B	Review and update the Districts Urban Water Management Plan to include additional analysis of multiple dry-year drought conditions.	Engineering / Conservation	Completed (2021) Mission Creek Basin Groundwater Sustainability Plan with DWA and CVWD
8	C	Evaluate opportunities for expanded use of recycled water including direct reuse and recharge into existing aquifers.	Engineering	Completed (2018) Feasibility Study

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

9	A	Participate on negotiations for final determination of the Ground Sustainability Agency for basins within the District's service area, which include the San Gorgonio Pass Sub-Basin, the Mission Creek Sub-Basin, the Indio Sub-Basin and the Desert Hot Springs Sub-Basin.	Administration	On-Going MSWD v DWA
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STRATEGIC GOAL # 2 – INFRASTRUCTURE

NO.	PRIORITY	PROJECT DESCRIPTION	DEPARTMENT ASSIGNED	STATUS
1	A	Conduct project design and construction to expand wastewater treatment capacity at the MSWD Regional Wastewater Treatment Plant by 1.5 million gallons per day.	Engineering	On-Going Under construction
2	A	Update existing water and wastewater master plans.	Engineering	On-Going
3	A	Conduct an analysis of staffing and workload allocation for infrastructure and maintenance operations to determine staffing needs based on industry standards. Identify opportunities for privatization of specific routine maintenance functions to augment staffing levels.	Engineering / Operations	On-Going Developing a work order management system to better track work orders
4	A	Identify and record easements for water and sewer utility purposes in those areas where they are currently missing.	Engineering	Completed/On-Going
5	A	Develop a Technology Plan that incorporates all aspects of the District's internal and external technology including, field operational technology.	Administration / Operations	On-Going
6	A	Conduct a financial and operational analysis of the impact of future residential and commercial development based on the Cities of Desert Hot Springs' and Palm Springs' General Plan.	Finance / Engineering	On-Going Master Plans and Long Range Financial Plan
7	A	Conduct an evaluation of alternative energy opportunities including cost and feasibility for each alternative.	Engineering	On-Going
8	A	Conduct an evaluation and cost analysis for renovation of the current administration and annex facilities. The evaluation should include space planning and opportunities for internal growth, public access and accessibility, ADA compliance, office ergonomics and furniture.	Finance / Engineering / Administration	On-Going
9	A/B	(A) Expand utilization of the current Geographic Information System for operational and facility use. (B) The system can be expanded to also include a customer database utilized by the Customer Service Department.	Engineering (A) / Customer Service (B)	On-Going
10	B	Conduct an analysis of the infrastructure needs and financial cost impacts to operate and maintain the Improvement District and develop a separate water rate structure for this area.	Engineering / Finance	On-Going Long Range Financial Plan
11	B	Conduct analysis of available capacity within the current water system with future water demand projections to forecast time of demand need. Incorporate results in UWMP updates and Water Master Plan updates.	Engineering	On-Going

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

12	C	Evaluate options for relocation of existing water infrastructure within inaccessible areas of the District for ease of maintenance.	Engineering / Operations	On-Going Water Master Plan
13	C	Pipeline replacement project for all galvanized piping within the water distribution system. Incorporate project in Master Plan update.	Engineering / Operations	On-Going Water Master Plan
14	C	Evaluate vendor options for automating the inventory management system for purchasing, receiving and warehouse operations. Develop cost estimates for future capital budget allocation.	Finance	On-Going

STRATEGIC GOAL # 3 – FINANCIAL MANAGEMENT

NO.	PRIORITY	PROJECT DESCRIPTION	DEPARTMENT ASSIGNED	STATUS
1	A	Convert the manual check signature process to an 'electronic' signature format including approval criteria established by the Board of Directors.	Administration / Finance	Completed (2018)
2	A	Automate the employee payroll structure and eliminate the manual entry of time and project numbers.	Finance / Administration / Human Resources	On-Going
3	A	Conduct a review of the employee performance evaluation process and the number of individual pay-range step increases allocated to employees based on employee tenure and the correlation to the evaluation process. Options include reducing the number of steps or establishing a median pay scale for each job classification.	Finance / Accounting	Completed (2022)
4	A	Update current accounting software interface.	Finance / Accounting	On-Going
5	A	Modify the vendor contract and material procurement and approval process to include authorization at the executive staff level (Director of Finance and Administration and Director of Engineering and Operations).	Finance / Administration	Completed (2018)
6	A	Conduct a customer experience and needs assessment to gauge customer interaction and service level experience.	Finance / Customer Service	On-Going
7	A	Modify the budget document preparation process to include additional financial detail designed to increase customer confidence and knowledge of the District's financial management practices.	Finance	Completed (2021) / On-Going GM Report / Budget submitted to GFOA
8	A	Develop and implement a customer education program designed to educate customers on water and sewer rates, capital spending requirements and budgeting.	Finance / Public Relations /	Completed (2021) Water 101 at Public Library

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

			Customer Service	
9	B	Implement changes to budget and revenue management to fully fund the reserve policy by 2020.	Administration / Finance	On-Going
10	B	Develop an asset management and replacement component of the Financial Master Plan.	Finance / Accounting	On-Going

STRATEGIC GOAL # 4– PUBLIC AND POLITICAL OUTREACH

NO.	PRIORITY	PROJECT DESCRIPTION	DEPARTMENT ASSIGNED	STATUS
1	A	Develop a comprehensive public relations strategy and master plan of activities and programs. Components of the plan shall include the overall goal of the program, staffing and resource needs, budget requirements and role and responsibility of the Board of Directors and staff for implementation.	Administration / Public Relations	On-Going Communication Strategic Plan completed in 2019
2	A	Develop a crisis communication protocol for use in natural disasters, emergencies and interruptions in water supply. The protocol should include the role of the Districts Emergency Operations Center (EOC) and the role of the Board of Directors and staff in communicating with the public, the media and other elected officials.	Administration / Public Relations / Engineering / Operations	Completed (2021)
3	A	Develop a staff engagement and training program to fully integrate the Districts Mission, Vision and Values throughout the organization. Employees as ambassadors of the organization are the program objectives.	Administration / Public Relations	Completed (2018) / On-Going Need to re-implement Post-COVID
4	A	Update the District website.	Administration / Public Relations	Completed (2021)

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

5	A	Develop a Board Handbook or Guidelines. Components to consider include: role, relationship and responsibility of the Board of Directors and staff, standards of performance and expectations of public office.	Administration	Completed (2020)
6	A	Communicate the goals and objectives of the 2017 Strategic Plan to all District employees. Provide updates on progress at least semi-annually.	Administration / Public Relations / Finance / Engineering /	Completed (2018)
7	A	Develop a strategy to position the Board of Directors as regional water leaders including elevating their public and professional profiles within the region. The Board of Directors is a resource for the District and the water industry.	Administration / Public Relations	On-Going

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

STRATEGIC GOAL # 5 – ORGANIZATIONAL DEVELOPMENT

NO.	PRIORITY	PROJECT DESCRIPTION	DEPARTMENT ASSIGNED	STATUS
1	A	Modify the employee performance evaluation process to incorporate employee input into performance measures and alignment with the Districts core values.	Human Resources / Administration / Finance / Engineering	Completed (2018)
2	A	Develop an organization-wide succession plan allowing employees the opportunity for professional growth, cross -training, and preparation for succession and temporary assignments to maintain continuity and operational effectiveness.	Human Resources / Finance / Engineering / Operations	Completed (2018) / On-Going
3	A	Enhance and strengthen the existing organizational culture through promotion of District vision and core values. Develop individual employee development plans to promote personal and professional growth.	Administration / Human Resources / Engineering / Operations / Finance	Completed (2018) / On-Going
4	A	Develop a comprehensive employee development and training program that is initiated during the on-boarding process when first hired and continues throughout employment with the District. Create an individual professional growth program for each District employee. Department supervisors and managers will monitor the program.	Human Resources / Finance / Engineering / Operations / Administration	Completed (2020) / On-Going
5	A	Develop a comprehensive supervisor development and training program for existing managers and supervisors as well as employees aspiring to supervisory positions. The program will provide education and skill development in the following areas: conducting an employee performance evaluation, agency policies and procedures, expectations of leadership, administration of the employee discipline and development process and developing individual employee improvement plans.	Human Resources / Finance / Engineering / Operations / Administration	Completed (2020) / On-Going
6	A	Develop a program and role for the Board of Directors in supporting and enhancing the development of a professional staff. Program to include the allocation of resources for an employee recognition program in coordination with performance metrics and the Districts core values.	Administration / Human Resources	Completed (2018) / On-Going

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

Project	Project Description	Status
Strategic Plan	Strategic Plan is envisioned to establish a long-term vision for MSWD and set a course of action for the next five years by establishing priorities, outlining actions to achieve objectives effectively, and develop a framework for reporting progress to the MSWD Board of Directors.	Workshop to be scheduled for early October 2023 To be completed Q1 2024
Long Range Financial Plan	Long-Range Financial Plan (LRFP) to support the long-term fiscal sustainability of MSWD. The LRFP will be used as the basis for projecting fiscal requirements needed to fund ongoing operations, reserves, debt service, capital improvements, and its non-potable water program.	Kick-off Meeting held in Q2 2023 To be completed Q1 2024
Water and Wastewater Master Plans	Water and Wastewater Master Plans are essential tools in identifying current and future system improvements. They allow the District to plan for and meet the ever-changing/growing water and wastewater needs within our service area. The current plans were completed in 2005 and 2007, and since that time several projects identified in them have been implemented. This combined with regulatory changes and new District produces that govern how we store, manage, and treat water, dictate that a comprehensive update is necessary.	Michael Baker International completed 80% Staff is reviewing and updating the models and report. To be completed Q4 2023
Enterprise Resource Planning (ERP) Software Replacement	The financial software is outdated, and the integration team members have informed MSWD that they will not be able to make the requested MSWD changes in the future. It is recommended MSWD migrate to a new ERP	Project was added to this year's budget. RFQ has been drafted but not published.
Work Order / Asset Management System	MSWD has fallen behind the industry in tracking field operations and transferring that information into an asset management system. Project will include updating the current ESRI software, purchasing a work order management software, and filling the GIS Specialist position.	ESRI software upgrade is ongoing. GIS position is budgeted. RFQ has been drafted but not published.
Customer Service Training Program	To enhance customer service throughout MSWD, staff will be re-organized and asked to participate in customer service training activities	June 2023 - Arturo and I made our first change by reorganizing an Office Specialist which was useful

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

		<p>until an employee health issue forced us to reallocated staff.</p> <p>August 2023 – Business Analyst created in exchange of retiring Sr. Customer Service rep. Dori and Kurt were moved to areas where their skills could be better utilized.</p> <p>October 2023 – Hiring aforementioned Business Analyst, temporary full-time Business Analyst</p>
<p>On-going Discussions with Army Corp of Engineers</p>	<p>MSWD have been working closely with the Army Corp of Engineers to design Areas A and G (Mission Lakes). We have also been successful in securing over \$1M in the last two federal fiscal years via community project grants through Carpi & Clay</p>	<p>Two (2) different Community Projects have been proposed by the US Senate -</p> <p>\$2.5M Padilla & \$5.4M Feinstein</p>

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

Project	Project Description	Status
Critical Services Center	<p>Construct a new administrative building and operations building to allow the District to grow and continue to provide service to its customers.</p> <p>Two Bunch location is no longer feasible due to environmental issues. Two (2) most obvious new locations are Corporate Yard and Nancy Wright Regional Wastewater Treatment Facility</p>	<p>Tour at East Valley scheduled for June 29th</p> <p>July 2023 - Workshop</p> <p>October 2023 – Site cost estimates to be provided</p>
Solar Installations on Multiple District Sites	As the State of California and Southern California Edison continues to promote solar projects to offset electrical grid demand, MSWD has been working with ENGIE to develop a solar energy plan at site where the most benefit would be achieved	<p>Design is currently underway.</p> <p>We expect a presentation to the Board to occur in Q3 2023</p>
Nancy Wright Regional Wastewater Treatment Facility	<p>A new 1.5 million gallon per day sequence batch reactor wastewater treatment plant. Project includes new operations and administration building that will house a solids processing area, chemical storage area, maintenance, electrical room, and blower room.</p>	<p>Start up to commence in Q3 2023</p> <p>Construction to be completed Q4 2023 Q1 2024</p>
Conveyance Line Construction	The Conveyance Line construction project includes a force main from the existing Dos Palmas Lift Station at Dillon Road and Avenida Manzana to Little Morongo Road and Dillon Road. From there, a gravity line will bring flows down to the new regional plant.	Construction to be completed Q4 2023 Q1 2024
Area M-2 Septic to Sewer Project	The Area M-2 Sewer Collection System will connect 695 parcels to the MSWD sewer systems and abate 405 on-site septic disposal systems. The Area M-2 Sewer Collection System is one of the three projects that comprise the Regional Water Reclamation Facility Project.	Construction to be completed Q4 2024
Supplemental Environmental Project (Septic to Sewer)	MSWD is to conduct a septic to sewer conversion program, abandoning septic systems located on private property and enhancing groundwater quality protection by removing known point sources of groundwater degradation in high-density economically	Construction to be completed Q4 2023

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023

2017 STRATEGIC PLAN PROJECT PRIORITY LISTING

	disadvantaged areas. Staff estimates that 21 properties can be benefited by this project.	
Well 22 Rehabilitation	Well 22 needs maintenance and rehabilitation. Well improvements include downhole rehabilitation and chemical treatment, new discharge piping and outlet systems, electrical panels, and new pump improvements.	Construction to be completed Q1 2024
Well 34, Well 35, and Associated Water Main	Funded by the current developer of Skyborne, MSWD is lead agency in the rehabilitation of Well 34, equipping Well 35, and designing and constructing the water main between the two wells	Construction to be completed Q4 2024
Well 42 Construction	Currently, under construction, the well will provide an additional water source for MSWD's 1240 and 1400 pressure zones.	Construction to be completed Q1 2024
Terrace Reservoirs and Site Rehabilitation	Rehabilitation and maintenance of the Terrace Reservoirs and site to enhance safety and operations and maintenance activities of the three existing reservoirs.	Construction to be completed Q4 2024

Priority A: 2018-2019

Priority B: 2019-2023

Priority C: 2023