

CAMROSA WATER DISTRICT



BUILDING WATER
SELF-RELIANCE



Woodard
& Curran



DELOACH
& ASSOCIATES, INC.

STRATEGIC PLAN

Fiscal Year 2022-23



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A STRATEGY FOR THE FUTURE

The California water industry is facing unprecedented challenges related to the increased frequency of drought cycles, the unreliability of imported water supplies, and State-mandated water-use efficiency standards. These are

a few of the factors that have reinforced Camrosa Water District's (District) long-standing commitment to a strategic process of building water supply self-reliance to ensure that the District is successful in accomplishing its mission well into the future. Water supply reliability, and managing the rising cost of water, labor, and critical resources, are key factors incorporated in the District's strategic planning process.

The District recognizes the need to be resilient, adaptable, and flexible to meet the current and future needs of its customers. This 2022-2023 Strategic Plan represents a significant commitment of time and effort on behalf of the Board of Directors and staff in evaluating the District's mission, vision, and goals for the next five years and beyond. The Strategic Plan provides the Board and staff with the strategies and guidance necessary to effectively manage the utility and support future planning efforts, including a comprehensive master plan scheduled for later in the 2022-2023 fiscal year.

CAMROSA WATER DISTRICT

The Camrosa Water District was formed in 1962 as a County Water District pursuant to the California Water Code and today provides water and wastewater services within a 31-square mile service area of Ventura County. The District provides retail water services to unincorporated areas of Ventura County, as well as areas within the city limits of Camarillo, Thousand Oaks, and Moorpark. Additionally, the District collects and treats wastewater from the Mission Oaks area of the City of Camarillo.

There are approximately 8,100 potable water connections, 400 non-potable and recycled water connections, and 5,800 wastewater connections within the District's service area. On average, the District imports approximately 50% of its total potable water supply from the Calleguas Municipal Water District, a wholesale member agency of the Metropolitan Water District of Southern California (Metropolitan), with the remainder from groundwater produced from the Arroyo Santa Rosa, Tierra Rejada, and Pleasant Valley groundwater basins. The District's non-potable water supplies include recycled water and surface water from Conejo Creek.

The District has taken an active leadership role in regional water resource management as a member of the Calleguas Creek Watershed Management Group, which is part of the Watershed

Coalition of Ventura County's Integrated Resource Management Plan. The District's Board of Directors, in partnership with the County of Ventura, serve as the Arroyo Santa Rosa Groundwater Sustainability Agency. The District also serves as the Groundwater Sustainability Agency for portions of the Pleasant Valley Basin outside the jurisdiction of the Fox Canyon Groundwater Management Agency, but within the District's service area and participates with the Fox Canyon Groundwater Management Agency for management of groundwater within the Fox Canyon Aquifer, including the Pleasant Valley Basin, where the District operates three wells and a brackish groundwater desalination facility.

THE STRATEGIC PLANNING PROCESS

Strategic planning is an organization's process for defining its purpose and future direction leading to decisions on the allocation of resources, including staffing, in furtherance of a defined strategy. It is a formal consideration of an organization's future. In 2008, the District's Board of Directors and management staff developed the 2008 Strategic Plan¹. The 2008 Strategic Plan has been used extensively by the Board of Directors and staff in guiding capital, operational, and financial decision making. Several of the goals identified in the 2008 Strategic Plan served as a catalyst for the current planning process.

Since the completion 2008 strategic planning effort, the District has also completed or is in the process of developing additional guidance and planning efforts, including the following:

- Operations and capital budgets (annual)
- Integrated Facilities Master Plan (2011 draft, with a new update begun in 2022)
- Integrated Technology Master Plan, including a component for cyber security threat protection (ongoing)
- Five-year Water Rate Study and Implementation Plan (2013 and 2019) and other financial planning efforts, including revenue and expense projections integrated with the annual budget. A new Five-Year Rate Study is scheduled to start in 2023.
- Draft Employee Classification and Compensation Plan (2021)

¹ The 2008 Strategic Plan can be found here:

<https://www.camrosa.com/wp-content/uploads/2022/03/Strategic-Plan-2008.pdf>

- Urban Water Management Plans (2010, 2015, 2020)

The District has prepared a new 2022-2023 Strategic Plan with the objectives of:

1. Defining the purpose of the organization.
2. Creating a strategy to align activities and resources to be integrated into a larger master planning effort.
3. Building consensus within the organization through enhanced communication.
4. Enabling the District to effectively communicate with its customers, stakeholders, elected officials, and other constituents on current and future projects and programs.

For the 2022-2023 Strategic Plan, the District retained the team of Woodard & Curran and DeLoach & Associates to facilitate and coordinate the planning process. Given the challenging environmental, hydrologic, and financial environment, it was determined that the Plan would use a five-year planning horizon, allowing the District to review progress and adapt to changes as needed. The planning process focused on the current and future role of the District as a high-performance organization and leader within its service area, as well as regionally. The 2022-2023 strategic planning process included a review of the District's mission, vision, and values statements, development of strategic vision goals, and an assessment of its core water and wastewater functions. The process also included conducting an influence modeling exercise to identify and evaluate relationships with other agencies or individuals that may influence the District's role with their customers and the public.

MISSION, VISION, AND VALUES

The mission statement states the intended purpose of the District while the vision statement describes the District's vision of its future role. The mission statement is the foundation for linking District operations and long-term strategy with execution of its strategic vision. The corporate values of an organization define specific performance and cultural expectations. Values establish standards of behavior as well as performance expectations that guide decision-making at every level of the organization.

As part of the strategic planning process, the District's Board of Directors reviewed and updated the mission and vision statements as well as the core values included in the 2008 Strategic Plan. The updated mission, visions and values are shown below.

MISSION STATEMENT

The mission of Camrosa Water District is to provide reliable, safe, and cost-effective water and wastewater services.

VISION STATEMENT

Camrosa Water District preserves and improves the quality of life for our customers through innovative leadership and exceptional customer service.

VALUES

To help achieve success, the District has identified a set of core values upon which it can base its policies and actions. These values are listed below along with a description of how the District defines each value as it works to complete its mission and achieve its vision.

Respect	We are considerate, caring, and treat others with dignity.
Transparency	We ensure that the decisions and investments we make are clearly communicated and understood.
Trust	We are trustworthy and ethical in the way we conduct business and in all our interactions.
Leadership	We are proactive in leading initiatives, policies, and practices on behalf of our customers, employees, and the community.
Innovation	We are creative and continuously seek to improve the services we provide.
Responsive Customer Service	Our internal and external customer service is provided with cooperation and collaboration exceeding customer expectations.
Commitment to Excellence	We take ownership of our actions and are committed to seeking solutions to continuously improve our effectiveness and services to our customers.
Teamwork	We are a service-oriented organization, acting as a team, placing the public interest above self-interest.

STRATEGIC VISION GOALS

The objective of strategic planning is to align activities with agreed-upon goals and objectives, based on a desired vision of an organization's future role. Five strategic goals were identified for this strategic planning effort. An assessment of the specific Strengths, Weaknesses, Opportunities, and Threats (S.W.O.T. Analysis) for each of the identified goals was utilized in developing strategies for accomplishing each goal. Each of the Strategic Vision Goals include potential strategies and programs for accomplishing the goal. The strategies noted for each goal were not intended to be an exhaustive list, but rather representative of the types of potential strategies available.

1. WATER SUPPLY INDEPENDENCE

The Camrosa Water District has built water self-reliance through strategies and programs designed to take advantage of new supply opportunities, while enhancing and conserving its current supplies.

Potential strategies for achieving this goal include:

- a. Maximize beneficial use of Camrosa's wastewater.
- b. Preserve existing non-potable water resources to increase the reliability of the District's potable water supply.
- c. Offset potable water demands by extending the non-potable distribution system into areas where it is not currently available and maximize the beneficial use of available non-potable supplies through groundwater recharge and treatment.
- d. Assess options to develop conjunctive use, cyclic storage, and aquifer storage and recovery programs, including opportunities to partner with Calleguas, Metropolitan Water District, and other agencies.
- e. Engage producers and others within the Tierra Rejada Groundwater Basin in developing mutual agreement on terms and conditions leading to development of a basin management plan.

2. INFRASTRUCTURE INTEGRITY

The Camrosa Water District invests in its infrastructure systems to ensure the integrity of treatment and distribution of its water supplies, as well as maintaining and improving facilities and operational support systems.

Potential strategies for achieving this goal include:

- a. Identify and prioritize future infrastructure needs, including operational support systems.
- b. Develop a financial management strategy to support the infrastructure needs recommended in the master plan.
- c. Conduct an annual capital improvement review process which identifies progress achieved on projects and programs outlined in the master plan.
- d. Develop an emergency backup power supply plan for critical facilities and explore opportunities for alternative energy production.
- e. Develop partnerships with agencies interested in cooperative agreements and investments in regional infrastructure projects.
- f. Engage in public outreach to increase awareness of how investments in infrastructure enhance water supply reliability benefiting the public.

3. PRUDENT FINANCIAL MANAGEMENT

The Camrosa Water District practices prudent financial management of its financial resources to ensure the current and future reliability of its operations.

Potential strategies for achieving this goal include:

- a. Develop a financial plan based on the projects and programs identified in the capital improvement and master plans.
- b. Conduct a cost-of-service analysis to identify revenue requirements to support current and planned capital and operational needs identified in the master plan, including all applicable rates, fees, and charges and reserve requirements.
- c. Continuously improve the District's financial modeling capability and budgeting process.
- d. Develop a comprehensive public outreach and communications strategy to increase customer awareness of the need for continuous investments in critical infrastructure.
- e. Continuously update analysis of unfunded liabilities to explore opportunities to reduce or eliminate risk.

4. PUBLIC TRUST

The Camrosa Water District proactively identifies opportunities to develop strategic alliances and partnerships that foster better relationships with its customers, political entities, and members of the public.

Potential strategies for achieving this goal include:

- a. Develop a comprehensive communications and public outreach strategy that includes customer education, collateral material development, and optimization of available social media platforms.
- b. Consider forming a Public Relations subcommittee consisting of members of the Board and staff to provide oversight and direction of the District's public outreach and communication efforts.
- c. Strengthen interagency collaboration by assuming a local and regional leadership role.
- d. Participate in local, regional, and statewide organizations, such as the Association of California Water Agencies (ACWA) and ACWA/JPIA, to influence decisions impacting the District and its customers.
- e. Ensure compliance with all water quality standards and regulations to preserve and improve the quality of life for our customers.
- f. Continue to implement proportionate cost-of-service policies to ensure that fees, rates, and charges are fair and equitable to each customer.

5. SERVICE EXCELLENCE THROUGH ORGANIZATIONAL DEVELOPMENT

The Camrosa Water District is committed to service excellence through organizational development by hiring, training, and retaining the highest quality employees and providing them with the tools to grow in their professional and personal development.

Potential strategies for achieving this goal include:

- a. Integrate the corporate values identified in the strategic planning process into the workplace culture through the District's hiring, training, and employee performance management practices.
- b. Conduct a staffing audit or Organizational Performance Assessment to align staffing needs with operational requirements.
- c. Establish a formal employee development program designed to train and retain employees while providing them with opportunities to grow personally and professionally.
- d. Organize training for the Board of Directors and management staff through the California Special District's Association and ACWA/JPIA.
- e. Promote workplace safety.
- f. Develop a merit-based compensation system to reward performance.

INTEGRATION WITH FUTURE PLANNING ACTIVITIES

The Strategic Plan will be incorporated into the District's existing planning processes to effectively guide development and management of capital and operational resources, including investments in water and wastewater infrastructure, operations, and staffing.

INTEGRATED MASTER PLAN UPDATE (2023)

Specific strategies, concepts, and projects identified in the Strategic Plan will be integrated with the development of the 2023 Master Plan. The master plan will identify and analyze specific projects and programs needed to develop future capital improvement and operational plans as well as longer-term water resources needs to meet sustainability goals.

STRATEGIC PLAN IMPLEMENTATION AND UPDATES

Adoption of the Strategic Plan requires a commitment of continuously assessing the District's progress and alignment with its mission, vision, and planning strategies. The District will adopt an annual Strategic Plan review process to monitor progress on stated goals and update implementation strategies as necessary. The Strategic Plan will be formally reviewed and updated every five years or as appropriate and made accessible to stakeholders and the public through a link on the District's webpage.



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