

Vista Irrigation District

# Strategic Plan

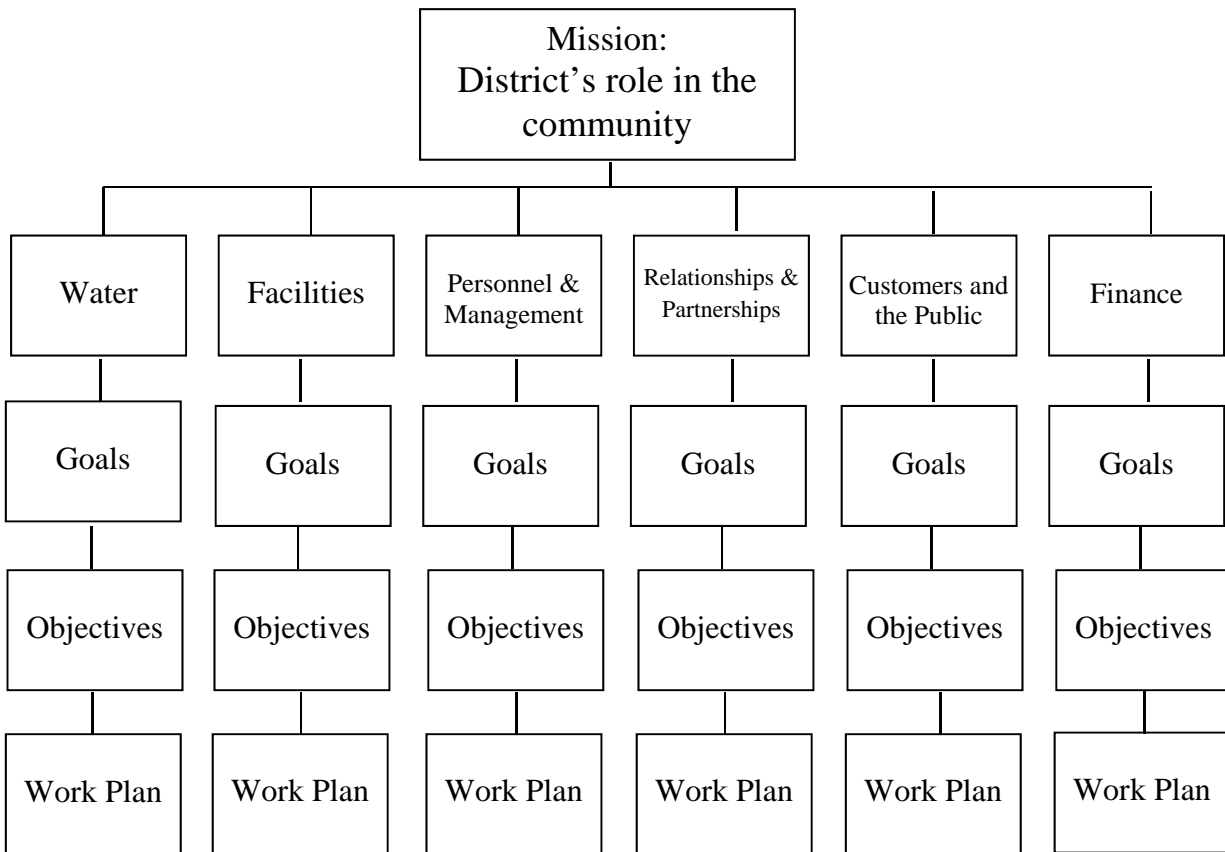
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# PART 1: INTRODUCTION

## Strategic Plan Structure



**Goals:** General areas of the District's functions.

**Objectives:** More specific direction on fulfilling each goal.

**Work Plan:** What staff will do to accomplish each objective.

### Mission Statement

The mission of Vista Irrigation District is to provide a reliable supply of high quality water that meets the needs of its present and future customers in an economically and environmentally responsible manner.

## District Values

In carrying out our mission, we conduct our activities in accordance with the following values:

- Honesty, Trust and Integrity
- Responsive customer service
- Respect for our employees
- Responsibility and Accountability
- Leadership
- Quality
- Effectiveness
- Reliable facilities
- Efficient operations
- Fiscal strength and stability
- Open communications
- Cooperative relationships



## **PART 2: STRATEGIC GOALS, OBJECTIVES & WORK PLAN**

### **Goal 1.0 Water**

*Develop and manage the resources necessary to provide a safe and reliable supply of quality water, sufficient to meet the present and future needs of our customers.*

Objective	Work plan	Completed	In Process	Ongoing	Future
1.1	<b>Develop a diversified portfolio of water supplies, to include:</b> <ul style="list-style-type: none"> <li>• <b>MWD/CWA Imported Water;</b></li> <li>• <b>Local Water;</b></li> <li>• <b>Recycled Water;</b></li> <li>• <b>Desalinated Water;</b></li> <li>• <b>Conservation;</b></li> <li>• <b>Lost Water;</b></li> <li>• <b>Supplemental Water;</b></li> <li>• <b>Alternative Water Supplies.</b></li> </ul>				
	1.1.1			X	
	1.1.2			X	
	1.1.3			X	
	1.1.4				
	a.			X	
	b.			X	
	c.				X
	1.1.5	X			
	1.1.6				
	a.			X	

Objective	Work plan		Completed	In Process	Ongoing	Future
	b.	Work with the cities of Oceanside, Carlsbad and Vista to deliver recycled water to the Shadowridge golf course and other potential markets.		X		
	1.1.7	Monitor and support the regional production and distribution of desalinated water. <i>[Carlsbad Desalination Plant is in process; other projects are ongoing.]</i>		X	X	
	1.1.8	Balance our direct participation in the desal project with our ongoing water quality needs, water production opportunities, and water distribution limitations. <i>[2012 – District chose not to become a direct customer of the Carlsbad Desalination Project.]</i>	X			
	1.1.9	Monitor and enforce the District’s Drought Response Conservation Program.			X	
	1.1.10	Work with the City of Vista to develop and implement appropriate conservation measures for public facilities, new development, and existing commercial and residential facilities.			X	
	1.1.11	Work with the region to develop and promote water conservation policies.			X	
	1.1.12	Develop and implement a new demand offset program.				X
	1.1.13	Provide and promote public education and outreach.			X	
	1.1.14	Maintain goal of total lost water to be less than 8 percent of the District’s total water purchases through meter change out, main replacement program, leak detection, polybutylene service line replacement, water theft prevention, etc.			X	
	1.1.15	Develop an approach to maximize the benefits associated with the supplemental water provided by the San Luis Rey Water Rights Settlement Act and Settlement Agreement.		X		
	1.1.16	Cultivate awareness and receptiveness to creative water supply opportunities, including groundwater banking and open market water purchases.				X
<b>1.2</b>	<b>Quantify and assign relative cost and other factors to rank each water resource.</b>					
	1.2.1	Retain a consultant to prepare an Integrated Water Resources Master Plan. <i>[4/3/2013 - Completed Water Supply Planning Study]</i>				X
<b>1.3</b>	<b>Project water demand for current and future customers.</b>					
	1.3.1	Utilize historical data and planning agency information to project future demands.			X	

Objective	Work plan			Completed	In Process	Ongoing	Future
1.4	<b>Develop plans and processes to assure that we meet or exceed all water quality standards.</b>						
	1.4.1		Monitor proposed changes to water quality regulations.			X	
	1.4.2		Provide training and resources sufficient to assess water quality standard compliance.			X	

## Goal 2.0 Facilities

*District facilities will meet their functional requirements, and be capable of meeting current and future regulatory and community needs, and:*

- Be safe, secure, efficient
- Of modern design
- Maintainable and upgradeable
- Environmentally responsible
- Meet high standards of appearance

Objective	Work plan		Completed	In Process	Ongoing	Future
2.1	<b>Assess and maintain all major District facilities:</b> <ul style="list-style-type: none"> <li>• <b>Transmission and distribution pipelines.</b></li> <li>• <b>Treatment facilities.</b></li> <li>• <b>Pump stations.</b></li> <li>• <b>Escondido Canal.</b></li> <li>• <b>Vista Flume.</b></li> <li>• <b>Potable Water Storage Reservoirs.</b></li> <li>• <b>Henshaw Facilities.</b></li> <li>• <b>Administration and operations headquarters.</b></li> </ul>					
	2.1.1	Replace aging pipeline infrastructure through the annual mainline replacement program.			X	
	2.1.2	Retrofit treatment facilities with water quality monitoring equipment. <i>[April 2008 – Installed Plant 2 equipment.]</i>	X			
	2.1.3	San Pasqual Undergrounding Project				
		a. Complete a feasibility study of the San Pasqual Undergrounding Project. <i>[2010 – Black &amp; Veatch feasibility report]</i>	X			
		b. Upon implementation of the San Luis Rey Water Rights Settlement Agreement, complete the design and construction of the San Pasqual Undergrounding Project.				X
	2.1.4	Demolish F & E-2 reservoirs and consider ultimate disposition of property.				X
	2.1.5	Consider taking MD reservoir out of service and possible demolition and sale of the site when the Flume is replaced.				X
	2.1.6	Reconstruct/replace E reservoir. Develop an orderly and proactive system to determine maintenance, repair and replacement actions.				X
	2.1.7	Alternative Energy Projects				



Objective	Work plan		Completed	In Process	Ongoing	Future
	a.	Implement photovoltaic solar energy production at the District's headquarters. <i>[Feb. 2011 – completed headquarters project.]</i>	X			
	b.	Consider alternative energy options on the Warner Ranch.		X		
<b>2.2</b>	<b>Develop an orderly and proactive system to determine maintenance, repair and replacement actions.</b>					
	2.2.1	Maintain the Vista Flume.				
	a.	Complete the pilot project for the re-lining of the Vista Flume. <i>[April 2010 – Completed MW Bench pilot project.]</i>	X			
	b.	Perform a evaluation of the present condition and expected life of the Vista Flume. <i>[November 2012 – Black &amp; Veatch report]</i>	X			
	c.	Perform high-priority maintenance projects on Vista Flume		X		
	d.	Prepare a bench-by-bench and siphon-by-siphon comparison of the costs and benefits of rehabilitating and/or replacing sections of the Vista Flume, culminating in a comprehensive long term plan for the disposition of all elements of the Vista Flume.		X		
	e.	Prepare detailed plans for the rehabilitation or replacement of each element of the Vista Flume.				X
	f.	Perform the rehabilitation or replacement of each element of the Vista Flume.				X
	2.2.2	For facilities other than the Vista Flume, prepare a Facilities Maintenance Plan that will include an assessment of each facility's condition, determine needed changes, establish schedules to make changes, establish priorities, and estimate project costs.				X
	2.2.3	Continue current preventative maintenance, repair and replacement activities.			X	
<b>2.3</b>	<b>Meet all anticipated and current regulatory requirements.</b>					
	2.3.1	Engage in training activities to stay informed regarding current and future regulatory requirements.			X	
	2.3.2	Include anticipated and current regulatory requirements in the assessment and maintenance of all facilities.			X	
<b>2.4</b>	<b>Prepare a Warner Ranch master plan.</b>					
	2.4.1	Consider the possible sale of the Warner Ranch. <i>(Board Workshop 4/18/2013 – determined consideration of the sale of the Warner Ranch not in the District's best interests at this time.)</i>	X			

Objective	Work plan		Completed	In Process	Ongoing	Future
	2.4.2		Consider compatible and/or competing uses of the Warner Ranch for water production, lease & license activities, environmental mitigation and stewardship.			X
	2.4.3		Consider preparation of a Natural Communities Conservation Plan to facilitate the master plan of the Warner Ranch.			X
	2.4.4		Protect and maintain cultural resources on the Warner Ranch.			
		a.	Rehabilitate the Warner Carrillo Ranch House. <i>[Opened to public November 2012]</i>	X		
		b.	Make the Warner Carrillo Ranch House available for public education and enjoyment.		X	
		c.	Rehabilitate the Warner Carrillo Ranch House barn.			X

### **Goal 3.0 Personnel and Management**

*Recruit and retain a workforce adequate to meet the needs of the District. Hire qualified, capable employees, provide training and improvement opportunities, create a safe, supportive and humane work environment, provide career incentives and support, and maintain “Open Door” access to management and the Board.*

Objective	Work plan		Completed	In Process	Ongoing	Future
<b>3.1</b>	<b>Complete and maintain a Workforce Planning and Career Development program that provides organizational staffing assessments and employee career planning, education, and training, and meets the standards of the Personnel and Management Goal.</b>					
	3.1.1	Assign Workforce Planning program coordinator(s). <i>[Feb.2012]</i>	X			
	3.1.2	Conduct periodic surveys to determine workforce planning requirements as a result of upcoming retirements.			X	
	3.1.3	Meet with employees by department to discuss program components and communicate individual responsibilities. <i>[Completed initial meetings April 2012, but task remains ongoing.]</i>	X		X	
	3.1.4	Make training opportunities available through consortiums and professional organizations/associations.			X	
	3.1.5	Encourage employee involvement in industry organizations to enhance work related skills and abilities.			X	
<b>3.2</b>	<b>Meet industry competitive levels of compensation and benefits.</b>					
	3.2.1	Conduct periodic surveys to assess salary and benefit levels relative to the industry and the marketplace.			X	
<b>3.3</b>	<b>Provide management training to all levels of management; utilize enlightened management methods to maintain a quality and supportive work environment of mutual respect.</b>					
	3.3.1	Schedule regular on-site training for supervisors and managers to reinforce leadership and teambuilding skills.			X	
	3.3.2	Periodically evaluate and provide feedback to ensure that management models the culture and expectations of the District.			X	
<b>3.4</b>	<b>Establish clear criteria for District standards of work achievement, work environment and personnel evaluation. Develop methods to assure that the standards are met.</b>					
	3.4.1	Review personnel policies on an annual basis and update and distribute as needed.			X	

Objective	Work plan		Completed	In Process	Ongoing	Future
	3.4.2	Establish, review and communicate work expectations and quality standards on a regular basis utilizing performance feedback sessions, coaching, and other methods.			X	
<b>3.5</b>	<b>Establish a workplace where success includes quality work and fun.</b>					
	3.5.1	Promote the values of quality work and fun through training and workplace teambuilding activities (as embodied in the FISH Philosophy).			X	
	3.5.2	Encourage additional involvement in District wide committees by employees throughout the organization.			X	

## Goal 4.0 Relationships and Partnerships

*Develop and maintain effective relationships with neighbor agencies and cities to provide opportunities for enhancing District water supplies, operational efficiency, and public cooperation.*

Objective	Work plan		Completed	In Process	Ongoing	Future
4.1	<b>Identify, develop, plan and pursue opportunities for selected mutually beneficial activities with neighbor agencies or entities to include, at minimum:</b> <ul style="list-style-type: none"> <li>• <b>Wastewater treatment plant, with City of Vista</b></li> <li>• <b>Water treatment plant, with City of Oceanside</b></li> <li>• <b>Distribution of desalinated water, with City of Carlsbad</b></li> <li>• <b>Potential merger/contractual relationship, with Vallecitos Water District</b></li> </ul>					
	4.1.1	Support and participate in City of Vista efforts to recommission the Shadowridge Water Reclamation Facility. <i>[10/5/2011 - Recommissioning deemed infeasible.]</i>	X			
	4.1.2	Foster collaborative arrangements with the City of Oceanside.				
		a. Consider options to collaborate with and/or secure production from the Weese Filtration Plant.		X		
		b. Monitor and evaluate City of Oceanside efforts to expand its brackish water desalination plant for possible District participation.			X	
		c. Consider collaboration on reclaimed water supply projects.		X		
	4.1.3	Monitor and support the Carlsbad desalination project with the SDCWA and other water and regulatory agencies		X		
	4.1.4	Assess the District's relationship with the Vallecitos Water District.				
		a. Review existing operational agreement with VWD.				X
		b. Monitor VWD plans to reorganize the Boot and Bennett areas.				X
		c. Continue to explore and develop intertie opportunities with VWD. <i>[The latest intertie was completed January 2013 at Reese Road – no new interties under active consideration.]</i>	X		X	
		d. Board review of past merger discussions with VWD.				X
	4.1.5	Maintain ongoing partnership with the City of Escondido relating to our joint water treatment plant and the local water system.				

Objective	Work plan		Completed	In Process	Ongoing	Future
	a.	Cooperate to maximize the mutual benefits of our local water resource and jointly owned treatment facilities.			X	
	b.	Develop and implement a revised local water system operating agreement.		X		
	4.1.6	Explore options for selling water from the Vista Flume to the City of Escondido, the Rincon del Diablo MWD, Valley Center MWD, Vallecitos WD, and the SDCWA.		X		
	4.1.7	Establish and maintain cooperative relationships with appropriate entities to protect the District's water supply interests in the San Luis Rey River, such as the San Luis Rey Watershed Council, the Upper San Luis Rey Watershed Authority, etc.			X	
<b>4.2</b>	<b>Resolve relations with Indian bands on water supply.</b>					
	4.2.1	Finalize and execute the San Luis Rey Indian Water Rights Settlement Agreement.		X		
	4.2.2	Develop a working partnership based on mutual respect.		X		
<b>4.3</b>	<b>Support efforts of the SDCWA to provide a reliable water supply.</b>					
	4.3.1	Continue to participate in SDCWA planning and implementation efforts for all potential water supplies. <i>[District serves on the SDCWA Master Planning Committee.]</i>		X	X	
<b>4.4</b>	<b>Maintain vigilance to protect the viability and independence of the District where independence continues to provide effective and cost efficient service to our customers.</b>					
	4.4.1	Maintain the District's identity as a special district.			X	
	4.4.2	Consider a name change to avoid association with the City of Vista and to avoid confusion related to the term "Irrigation".				X

## Goal 5.0 Customers and the Public

*Keep customers and the public informed about critical water issues, including water supply, water quality, infrastructure needs and issues, water cost issues, and water conservation.*

Objective	Work plan		Completed	In Process	Ongoing	Future
<b>5.1</b>	<b>Assure that all water users, as well as property owners/managers, receive meaningful water information from the District.</b>					
	5.1.1	Maintain up-to-date contact lists differentiating owner and tenant status.			X	
	5.1.2	Prepare, assess, update and disseminate timely information to all District customers through various media: <ul style="list-style-type: none"> <li>a. direct mailing;</li> <li>b. web site;</li> <li>c. on-hold messages;</li> <li>d. public service announcements;</li> <li>e. press releases;</li> <li>f. electronic communications.</li> </ul> <i>[District web site redevelopment proposed for FY 2014 budget.]</i>		X	X	
<b>5.2</b>	<b>Increase the public's understanding of the District as a separate, independent public entity, whose Board is elected by the public.</b>					
	5.2.1	Promote organizations that are dedicated to communicating the value and importance of special districts, such as the California Special Districts Association and the Association of California Water Agencies.			X	
	5.2.2	Achieve and maintain recognition from the Special District Leadership Foundation as a "District of Distinction". <i>[The District was accredited as a "District of Distinction" in September, 2009; is in the process of meeting revised requirements for reaccreditation in August, 2013; and intends to maintain this status on an ongoing basis.]</i>	X	X	X	
<b>5.3</b>	<b>Obtain information about customer knowledge and understanding of water issues affecting the District and the community.</b>					
	5.3.1	Participate in regional surveys such as those conducted by the SDCWA to assess customer awareness levels.			X	
	5.3.2	Participate in community organizations in order to receive and deliver communications regarding the District and the water industry.			X	

Objective	Work plan		Completed	In Process	Ongoing	Future
<b>5.4</b>	<b>Provide understandable and interesting information about the District and water issues.</b>					
	5.4.1	Maintain the District's Speakers Bureau program to provide appropriate speakers to community groups and organizations.			X	
	5.4.2	Evaluate and utilize alternatives such as print media, television media, Internet, industry publications, newsletters, and speaking engagements to convey District messages and information to the appropriate audiences.			X	
	5.4.3	Develop unique and creative approaches to public outreach, particularly related to drought and conservation, such as through the District's Public Service Announcement (PSA) program in local movie theaters.			X	
<b>5.5</b>	<b>Maintain effective and customer-friendly customer service activities.</b>					
	5.5.1	Provide friendly and responsive customer service at the counter.			X	
	5.5.2	Provide timely personal response to telephone customers.			X	
	5.5.3	Improve electronic/technological options in order to provide better service to the public, such as website redesign and expanded customer account inquiry/payment options. <i>[Electronic bill presentment and payment implemented July 2012; web site redevelopment proposed for FY 2014 budget; and new enhancements are being considered on an ongoing basis.]</i>	X	X	X	
	5.5.4	Improve customer service in the field by promoting outreach activities to customers affected by District actions in the field.			X	



## Goal 6.0 Finance

*The District will maintain a clear, comprehensive and understandable account of its financial condition, assure that District activities are conducted in a financially stable, prudent and businesslike manner, in order to minimize, to the extent possible, undesirable financial impacts on its customers.*

Objective	Work plan		Completed	In Process	Ongoing	Future
<b>6.1</b>	<b>Develop and maintain a broad, high level summary of the District’s financial situation. Include reference to major financial issues such as the Vista Flume/pressurized pipeline project, Indian litigation settlement, desalination project, Weese Treatment Plant involvement, rising MWD/CWA imported water costs, water sales reduction due to conservation, rising energy and other operating costs, Warner Ranch issues and others, all of which have the potential of increasing customer rates.</b>					
	6.1.1	Update “Cost of Local Water Study” [Black and Veatch report – April 2013]	X			
	6.1.2	Prepare a financial feasibility analysis for participating in the Weese Filtration Plant expansion		X		
	6.1.3	Gather and update data and information needed to assess the District’s long term financial situation. Consider, as a minimum:				
	a.	Revenue fluctuations;	X		X	
	b.	Operating expenses;	X		X	
	c.	Infrastructure replacement;				X
	d.	Water Master Plan expansion projects;				X
	e.	Indian settlement costs; [B&V – 2013]	X			
	f.	Projected water costs;	X		X	
	g.	Well field replacement costs; and				X
	h.	Other Warner Ranch strategic planning issues				X
<b>6.2</b>	<b>Prepare and maintain a Strategic Financial Plan, with a time horizon of at least 5 years and beyond, that takes into account the major issues from Objective 6.1. Make recommendation with respect to customer rates; debt options such as GO bonds, COP’s, State Revolving Fund loans, grants, bank loans, and so forth; and reserve categories and levels.</b>					
	6.2.1	Update the Strategic Financial Plan.			X	
	6.2.2	Maintain the Financial Reserve Policy.			X	

Objective	Work plan		Completed	In Process	Ongoing	Future
<b>6.3</b>	<b>Conduct Board workshops to explain and address key financial issues such as rates, reserves, borrowing, facility costs and so forth, contained in the Strategic Financial Plan.</b>					
	6.3.1	Conduct Board workshop on tiered water rate structures for various levels of water supply reductions [3/18/09]	X			
	6.3.2	Conduct Board workshop on SDCWA water rates, addressing: a. Costs of MWD, IID and Canal Lining water sources; b. SDCWA fixed and variable rate components; c. Projected future water supply costs; and d. Cost of non-compliance with mandatory reductions.				X
	6.3.3	Conduct Board workshop on revenue deficiency (non-drought rate increases). [5/13/09]	X			
<b>6.4</b>	<b>Assure that critical financial issues that may impact customers are adequately communicated to the public.</b>					
	6.4.1	Hold public hearings on tiered water rate structures. [7/15/09]	X			
	6.4.2	Hold public hearings on mandatory water reductions, if applicable. [10/7/09]	X			
	6.4.3	Develop and provide financial information in a customer-friendly, understandable format for use in public outreach materials and forums.			X	