



*Elsinore Valley Municipal Water District*

# **Strategic Plan**

## **2021-2026**

**September 2021**



**Rainforest**  
STRATEGIES

## General Manager's Welcome



**Greg Thomas**

I am pleased to present the Elsinore Valley Municipal Water District 2021-2026 Strategic Plan. This Plan was developed through a series of collaborative workshops and working sessions with EVMWD's Board of Directors, staff, and expert support.

Each participant was asked to share their vision for EVMWD's future as a whole and assess our strengths, weaknesses, opportunities, threats, and trends (SWOTT). Participants were also tasked with identifying EVMWD's top priorities for the next few years. We included relevant trends research influencing our industry and utilized customer and stakeholder input and surveys on District performance and perception. It should not be lost on the team that this effort occurred during a worldwide pandemic caused by COVID, so some of this had a direct impact.

The result is a Plan which clarifies our mission, vision, values, and establishes the objectives EVMWD must master. These are translated into tangible measures and initiatives so we can manage day-to-day activities toward achieving those objectives. As any plan, it is aspirational, yet focuses on the key elements to be successful and improve our services to the customer. The plan also significantly improves the staff, Board, customers and other stakeholders' ability to communicate our priorities and collaborate much more effectively. Lastly, it is a living document, so that as items are completed or new challenges arise, we can remove or add as necessary.

I want to personally thank each and every one of you who made this project a success – I look forward to working with everyone as we implement EVMWD's plan together!

Greg Thomas  
General Manager  
Elsinore Valley Municipal Water District  
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## Overview

This Strategic Plan document’s intent is EVMWD’s Board, Staff, and key Customers’ declaration of record about EVMWD’s mission, vision, values, overall strategy, and the objectives, measures, and initiatives intended to achieve those through 2026. The collaborative process that generated the decisions and statements reflected here was developed over a series of events in 2021 involving all Board members and Staff. In all, over 65 District employees participated over 6 months of collaborative online and in-person work.

## Participants

### EVMWD Board

Darcy Burke – Division 1                      Harvey Ryan – Division 2  
 Chance Edmondson – Division 3      Phil Williams – Division 4  
 Andy Morris – Division 5

### EVMWD Staff

Greg Thomas, EVMWD General Manager, and over 65 Staff representing all departments participated in this planning process. Staff names and departments are listed on the following page.

## Facilitation

Special thanks to Susie Evans, EVMWD Administration, for masterful set up and online tools management that made this process possible.

This strategic planning process was designed, facilitated and documented by Joe Sterling of Sterling Insights, LLC./Rainforest Strategies  
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Special thanks also to Julie Garel and John Bickerman of Charette, for collaboration and support ensuring their branding effort and this strategic planning effort were well aligned from beginning to end.

## Staff Participants

<b>Administration</b>	Susie Evans	Terese Quintanar
<b>Business Services</b>	Allison Cadava	Skyler Munson
<b>Business Services / Community Relations</b>	Bonnie Woodrome	Christina Henry
	Haley Munson	Kaitlyn Wu
	Marco Chavira	Tammy Ramirez
	Tina Christensen	
<b>Business Services / Finance</b>	Corrine Nikolic	Elena Estelle
	LaDawn Allen	Natalee Dee
	Serena Johns	Scott Thompson
<b>Business Services / Information Technology</b>	Daniel Markham	Darryn Flexman
	Gerald Hannah	Jason MacGill
<b>Business Services / Purchasing</b>	AJ Rivera	Barbara Mason
<b>Engineering</b>	Matthew Bates	Andrea Kraft
	Nelson Nuezca	Shawnele Morelos
	Vanessa Paneto	Christina Bachinski
	Mayra Cabrera	Sheena Weiss
	Jason Dafforn	Christina Ramirez
<b>Government Relations</b>	Greg Morrison	
<b>Human Resources</b>	Isabel Casteran	Jaime Huffman
	Jennifer Dancho	Jon Moore
<b>Operations</b>	Jase Warner	Keith Ray
	Daryl Conner	Ryan Johnson
	Bill Graham	Dave Smith
	Jessie Arellano	Lenai Hunter
	Alex Ramirez	Jesus Barron
	George Kolb	Ivan Banda
	Javier Hernandez	Jennifer Aguirre
	Tim Collie	Ruben Murillo
	Brian Vigil	Shawn Gray
<b>Strategic Programs</b>	Jorge Chavez	Margie Armstrong
<b>Water Resources</b>	Parag Kalaria	Jesus Gastelum
	Shane Sibbett	Sudhir Mohleji
	Mike Ali	Patrick Allen
	Edgar Davalos	

# Strategic Direction

## MISSION

**The EVMWD team delivers total water management that powers the health and vibrancy of its communities so life can flourish.**

## VALUES

**To succeed, we prize above all...**

### PROFESSIONALISM

- Perseverance ■ Productivity ■ Reliability ■ Poise ■ Quality Work ■ Competence

This means we show knowledge, effectiveness, and competency with coworker and customer interactions. We maintain a calm, professional outward demeanor, upholding a reputation for accuracy, dependability, expertise, efficiency, and high quality through information, services, and product delivery.

### ENTHUSIASM

- Learning ■ Innovation ■ Compassion ■ Sense of humor ■ Humility ■ Excitement ■ Mindfulness

This means we possess a strong drive and desire for learning, innovation, forward-thinking, and the overall desire to do our job well.

### INTEGRITY

- Loyalty ■ Courage ■ Insight ■ Transparency ■ Openness

This means we are sincere and demonstrate high moral standards in principles, intentions, and actions; we have an honest and open approach to all conduct aspects that encourages loyalty, transparency, fairness, and trust.

### INCLUSIVENESS

- Communication ■ Appreciation ■ Diversity ■ Teamwork ■ Respect

This means we conduct ourselves in a manner promoting respect and teamwork. Inclusiveness means communication with and appreciation for all, understanding each person is unique. We strive to understand how to work with our differences, provide better service, work products, and enhance organizational culture.

### STEWARDSHIP

- Fiscal responsibility ■ Environmental responsibility ■ Customer service ■ Resource management ■ Safety consciousness.

This means we take responsibility for and ownership of assigned responsibilities; we value public health and the environment, we consider customer expectations, both internal and external; we demonstrate a proactive, positive willingness to serve (service to others).

# Strategic Direction

## VISION

**EVMWD is Southern California’s most innovative, diverse and trusted public utility partner.**

**By 2030 EVMWD will be:**

- **Innovative, creative, proactive, and technologically advanced.**  
We will be a leader in technology and process innovation to provide the cleanest water, wastewater, and recycled water services focused on public health. We provide proactive, efficient operations and ensure reliable infrastructure.
- **“One Water:” water sourcing, wastewater treatment, water recycling.**  
We will operate a system that produces the highest quality water, most reliable water distribution, comprehensive wastewater collection, and effective water recycling. We manage every drop in the basin as One Water system that is sustainable, resilient and diversified.
- **Trusted and recognized for positive relationships: Customers, Community, Staff.**  
We will exceed customer expectations, increase customer satisfaction, increase two-way communication, and increase community collaboration. We will earn the complete trust of our customers, peers, community and staff by industry leading transparency and engagement.
- **Fiscally fit and highest value.**  
We will be one of the financially strongest and most resilient Districts for our size in Southern California. Our rate structure will provide resources and services at the best value for the rate payer dollar.

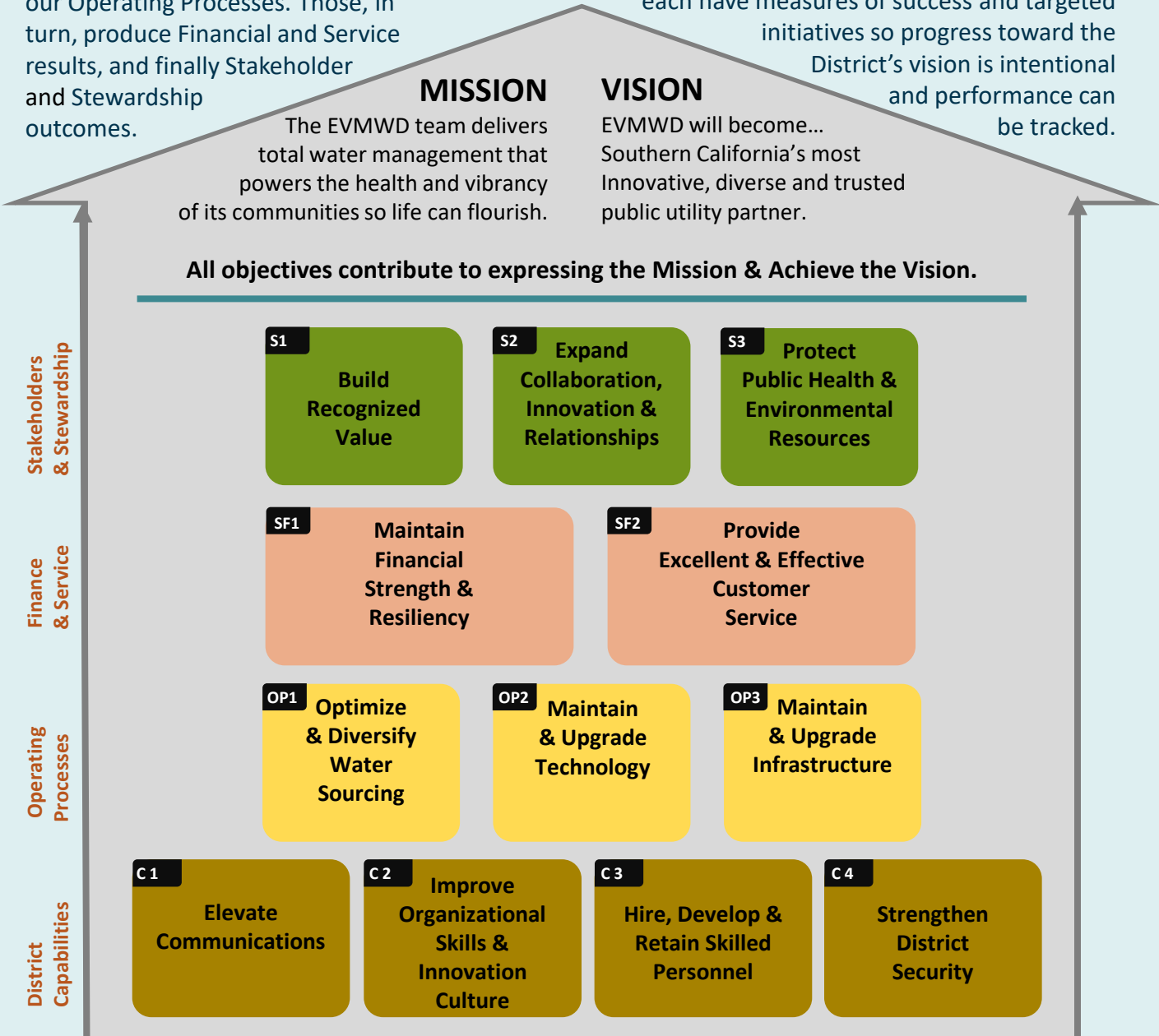
# EVMWD - Strategy Map

## About this map:

Each block represents an objective that EVMWD works to achieve every day. The bottom row of objectives improve our District Capabilities. These enable the next layer up, our Operating Processes. Those, in turn, produce Financial and Service results, and finally Stakeholder and Stewardship outcomes.

## Doing a good job:

EVMWD's Board and Staff are working hard to achieve these objectives. There is a direct linkage between getting results on the objectives and expressing the District's mission. The objectives each have measures of success and targeted initiatives so progress toward the District's vision is intentional and performance can be tracked.



## EVMWD VALUES:

- Professionalism ■ Enthusiasm ■ Integrity ■ Inclusiveness ■ Stewardship

# C1. District Capabilities: ELEVATE COMMUNICATIONS

**Objective:** Further the District’s mission, vision, objectives and brand values through elevated communications.

- Measures:** Great **Internal** communicators and influencers generate...
- Improvement in staff, management and Board morale, as demonstrated through increased satisfaction ratings on employee engagement surveys, turnover reduction, and industry awards/recognition. Increase 20% from baseline.
- Great **External** communicators and influencers generate...
- 70% or more satisfaction and brand recognition in external surveys and industry awards/recognition. Increase 20% from baseline.

Initiatives	Target Date	Responsible Group
<p><b>Brand:</b></p> <ul style="list-style-type: none"> <li>• Finalize the brand/positioning/image update initiative with contemporary graphics. Flow brand changes across internal and external facing items, surfaces, documents, etc. Use programmed timeline.</li> <li>• Perform annual employee and customer branding and satisfaction surveys.</li> </ul>	<p>Initial Oct 2021 Complete Jul 2022</p> <p>Annually after implementation – Jul 2022</p>	<p>Board of Directors; Executive Mgmt.; All</p> <p>Community Affairs</p>
<p><b>Marketing Communications Update:</b></p> <p>Update District Style Guide reflecting the brand update. Align the website, quarterly Waterlogs, bill inserts, and social media posts to the updated brand/style guide. Update all instances where mission, vision, values, and objectives appear. Note how mission, vision, and strategic direction changes target audiences.</p>	<p>Mar 2022</p>	<p>Community Affairs</p>
<p><b>Social Media:</b></p> <p>Refresh social media plan, leveraging the brand and District descriptor updates. Consistent with today’s stakeholder expectations for online communication, proactively master social media as needed.</p>	<p>Feb 2022 (no later than 6mos. after completion of rebranding)</p>	<p>Community Affairs</p>
<p><b>Interpersonal Communication &amp; Influence:</b></p> <p>Plan staff and Board training to improve general communication and influence skills promoting collaboration, innovation, advocacy, legislation, negotiations, etc.</p> <ul style="list-style-type: none"> <li>• Proactively highlight employee accomplishments.</li> <li>• Clearly communicate the annual employee engagement survey purpose, results, and action items.</li> </ul>	<p>Develop plan for training within 6 months; ongoing efforts after plan developed</p>	<p>Board of Directors; Executive Mgmt.; HR; Community Affairs</p>
<p><b>Transparency:</b></p> <p>Building upon current efforts and branding study, improve level of board packets, website, outreach and public information, etc.</p>	<p>Initial by Dec 2021; Ongoing</p>	<p>Executive Mgmt.; Administrative Services; Business Services; Engineering; Operations</p>



## C2. District Capabilities: IMPROVE ORGANIZATIONAL SKILLS & INNOVATION CULTURE

**Objective:** Build and refresh Board and District skills and knowledge. Ensure consistently effective leadership, wise decision-making, and anticipatory innovation.

- Measures:** We will know we are successful when...
- Strategic plans are completed/executed/reviewed periodically and revised as appropriate.
  - Programs, policies and objectives demonstrate a proactive versus reactive culture and mindset using the Rainforest Scorecard metrics; 20% increase from baseline.

Initiatives	Target Date	Responsible Group
<p><b>Strategic Planning:</b> Annual review and regular progress check-ins for course correction. Maintain coherent strategic, operational, and brand direction; manage to priorities; lead implementation; disciplined, collaborative updates.</p>	Calendar Year End 2021	Board of Directors; Executive Mgmt.
<p><b>Board Skills Onboarding &amp; Refresher Training:</b> Develop and implement regular industry standards/benchmarks training to assist Board productivity, legislative advocacy, Board governance &amp; operating basics.</p>	Calendar Year End 2021; Review/Refresh semi-annually	Board of Directors; General Manager; Administrative Services; Legal
<p><b>Industry &amp; Situational Awareness (PESTEL, SWOTT):</b> Develop/refresh situational awareness for water industry and larger trends (innovation economy, environmental and public health topics, climate realities, social changes influencing customers and employees, security topics).</p>	Complete initial by Feb 2022. Annual updates by every Feb	Board of Directors; Executive Mgmt.
<p><b>Culture that Balances Innovation &amp; Excellence:</b> Board and management champion frameworks, policies, and role models. Develop policies and programs that promote innovation. Rainforest Scorecard framework.</p> <ul style="list-style-type: none"> <li>• Create employee Innovation Reward Program.</li> </ul>	Dec 2021; annually every Aug  Dec 2021	Board of Directors; Supervisory Staff
<p><b>Supervisory &amp; Management Training:</b> Employee cross-training and management development programs, keep skills and knowledge current, and build focus on culture of innovation and effective change management.</p>	Jan 2022; annually reviewed thereafter	HR; Supervisory and Mgmt. Staff
<p><b>Collaborative Relationships inside District:</b> Select an innovation culture assessment and framework to measure collaboration and innovation conditions; periodically reassess and track Staff, Management, and Board improvements.</p>	Jul 2022; Annually	General Manager; Executive Mgmt.; HR

## C3. District Capabilities: HIRE, DEVELOP & RETAIN SKILLED PERSONNEL

**Objective:** Attract, hire, develop, and retain a diverse and highly skilled workforce.

- Measures:** We will know we are successful when...
- A high number of diverse, qualified candidates apply for open positions.
  - Employee retention rates continuously improve, and internal promotion rate is higher than benchmarks.
  - Compensation/Benefits packages are competitive, and program offerings attract the next generation of employees.

Initiatives	Target Date	Responsible Group
<b>Leadership Training &amp; Development Programs:</b> <ul style="list-style-type: none"> <li>• Staff training programs promoting succession planning/increase promotion readiness.</li> <li>• Incorporate time management training to existing development programs.</li> <li>• Leadership programs designed to develop current and future leaders' skills.</li> </ul>	In process – Est. 2022	Exec. Staff (General Manager)
<b>Develop and expand a workforce development plan.</b>	Mar 2022 and annual review	Exec. Mgmt.; HR; Community Affairs; Supervisory Staff in Applicable Depts.
<b>Develop Succession Planning &amp; Knowledge Transfer processes:</b> <ul style="list-style-type: none"> <li>• Development of SOP for each Dept. regular activities.</li> <li>• Defined cross training and knowledge sharing programs.</li> <li>• Improved technology utilization for knowledge share/institutional knowledge capture.</li> </ul>	Jul 2022 - Review annually	HR Lead; All departments
<b>Organizational Development Programming:</b> <ul style="list-style-type: none"> <li>• Training and education utilization - Capitalize on training, provide implementation methods, and foster the skills learned and tools obtained.</li> <li>• Enhanced DISC training programs.</li> <li>• Implement improved performance evaluation program, focusing on employee development.</li> </ul>	Organizational Development: Jul 2022 – ongoing semi-annual review/refresh	HR; IT; Exec. Mgmt.; All Supervisory Staff; Enlightened Bite
<b>Conduct team building exercises at two levels:</b> <ul style="list-style-type: none"> <li>• Executive Mgmt.; Managers; Supervisors</li> <li>• Board of Directors; Executive Mgmt.</li> </ul>	Start Jan 2022 (semi-annual)	Exec. Mgmt.; Managers; Supervisors; Board of Directors
<b>Conduct Organizational Assessment/Study for efficiencies.</b>	Jul 2022 & every 5 years after	General Manager; HR
<b>Review and enhance existing compensation plan to attract and retain highest caliber of employee.</b>	Jan 2022	HR; General Manager; Legal; Bargaining Unit Representatives
<b>Develop and implement a Mentor/ Volunteer Program.</b>	Develop Feb '22; Launch May '22	HR

# C4. District Capabilities: STRENGTHEN DISTRICT SECURITY

**Objective:** Strengthen District facilities security and physical assets; District information systems and technology controls; and improve water resources protections.

**Measures:** We will know we are successful when...

- Meet or exceed industry standards, regulations, and best practices.

Initiatives	Target Date	Responsible Group
<p><b>Review and enhance IT/Controls Security plan</b> that meets or exceeds industry standards, regulations, and best practices.</p> <ul style="list-style-type: none"> <li>• Evaluate application of Internet of Things (IoT) to District applications and usage.</li> </ul>	<p>IT Master Plan: Apr 2022</p> <p>Mar 2023</p> <p>Disaster Recovery Plan Update: Jul 2022</p> <p>SCADA Master Plan: Jul 2023</p>	<p>IT; Operations</p>
<p><b>Review and enhance Water Resources &amp; Facilities Security plan</b> that meets or exceeds industry standards, regulations, and best practices.</p>	<p>Update existing Water Infrastructure RRA: Apr 2025</p> <p>Update existing ERP: Sep 2025</p> <p>Initiate WW/RW Infrastructure RRA: Jun 2022</p>	<p>Water Resources; Engineering; Operations; IT; HR/Safety</p>
<p><b>Collaboration for Security:</b> Engage other agencies and jurisdictions to access and share threat identification information, potentials for collaborative response and recovery. Engage community stakeholders and customers to enroll local support for District security.</p>	<p>Periodic review &amp; report out by stakeholders; 4 months</p>	<p>Facilities; IT, HR/Safety; Operations; Community Affairs</p>
<p><b>Implement Cybersecurity Network Intrusion Detection system</b> NID for Business, SCADA and DCS networks.</p>	<p>2022</p>	<p>IT</p>

# OP1. Operating Process: OPTIMIZE & DIVERSIFY WATER SOURCING

**Objective:** Proactively optimize and diversify water sources to meet increasing quality standards and greater demand.

**Measures:** We will know we are successful when...

- Develop and implement plans that focus the District’s efforts on meeting “One Water” by 2050.

Initiatives	Target Date	Responsible Group
<b>Update the Integrated Resources Plan</b> addressing long-term water supply, water quality, and climate challenges.	Dec 2022	Engineering; Operations
<b>Develop a comprehensive groundwater treatment strategy</b> as part of the Water Master Plan Update.	Mar 2023	Engineering; Operations
<b>Implement Groundwater Sustainability Plans (GSP)</b> for our local groundwater basins (Elsinore Valley (Elsinore, Warm Springs, and Lee Lake) and Bedford/Coldwater sub-basins) as requested by Sustainability Groundwater Management Act (SGMA) fostering long sustainable Groundwater resources use.	Dec 2021; followed by annual and 5-year updates	Water Resources
<b>Optimize existing assets use to decrease imported water dependence.</b>	2030	Engineering; Operations; Water Resources
<b>Explore purchasing additional groundwater or surface water rights.</b>	2030	Assistant General Manager-Engineering & Operations
<b>Develop a regional coalition to explore the Inland Empire area desalination feasibility.</b>	2030	Assistant General Manager-Engineering & Operations

## OP2. Operating Process: MAINTAIN & UPGRADE TECHNOLOGY

**Objective:** Proactively maintain and upgrade technology, meeting District operational needs.

**Measures:** We will know we are successful when...

- Maintain 99% system uptime.

Initiatives	Target Date	Responsible Group
<p><b>Update District software and hardware matrix</b> and review version, utilization level, cost, and alternatives.</p>	End of 2021, reviewed annually	IT, All Departments
<p><b>Implement Software Applications, improving existing business processes:</b></p> <ul style="list-style-type: none"> <li>• GHR</li> <li>• Permit Tracking</li> <li>• AMI/AquaHawk (water loss)</li> </ul>	<p>2023</p> <p>Dec 2022</p> <p>Jul 2022</p>	<p>HR; IT</p> <p>Engineering; IT</p> <p>Operations; Engineering; IT</p>
<p><b>Institute Asset Management Program</b></p> <ul style="list-style-type: none"> <li>• CMMS</li> </ul>	<p>Jun 2025</p> <p>Dec 2023</p>	<p>Engineering; Operations; IT</p>
<p><b>Explore or investigate implementing Artificial Intelligence (AI) opportunities for operations and efficiency.</b></p>	2024	IT; Operations; Engineering; Assistant General Managers

## OP3. Operating Process: MAINTAIN & UPGRADE INFRASTRUCTURE

**Objective:** Proactively maintain and upgrade the District’s infrastructure.

**Measures:** We will know we are successful when...

- Meet established KPIs for water, wastewater, and recycled water infrastructure.

Initiatives	Target Date	Responsible Group
<b>Update water, sewer, and recycled water master plans.</b>	2022; every 5 years after	Water Resources; Engineering
<b>Deliver 80 percent of the planned 5-year CIP program.</b>	Biennial (match to budget)	Engineering; Operations; Water Resources
<b>Implement a pipeline replacement program</b> specifically focusing on fire, pressure, and age-based deficiencies.	2023	Operations; Engineering
<b>Continue meter testing and replacement program compliance.</b>	Ongoing	Operations; Water Resources; Customer Service

## SF1. Finance & Service: MAINTAIN FINANCIAL STRENGTH & RESILIENCY

**Objective:** Grow the revenues and assets sustainability and reliability.

**Measures:** We will know we are successful when...

- Maintain bond rating at or above AA.

Initiatives	Target Date	Responsible Group
<b>Update Long-Range Financial Plan</b> including risk analysis while anticipating increasing uncertainties.	2022; Every budget cycle	Business Services
<b>Perform rate studies.</b>	2024	Business Services
<b>Investigate alternative rate setting models.</b>	Jun 2023	Business Services; Strategic Programs; Executive Management
<b>Explore alternative revenue, cost savings, services and internal efficiencies.</b>	Jun 2022	Business Services; Engineering; Operations
<b>Implement grant strategic funding plan.</b>	Jul 2021; Ongoing	Grants; Engineering

## SF2. Finance & Service: PROVIDE EXCELLENT & EFFECTIVE CUSTOMER SERVICE

**Objective:** Build customer trust and credibility.

**Measures:** We will know we are successful when...

- Hit targets (70% or better satisfied/neutral) in customer-based surveys and polling.

Initiatives	Target Date	Responsible Group
Customer Service / Employee Ambassadorship Training.	Annually	HR; Executive Staff
Promote and encourage community program involvement.	Ongoing	Community Affairs; Operations; HR; Customer Service
Survey customers after staff interactions and community events.	Dec 2021; ongoing	Community Affairs; IT
Increase technology use to assist customer interaction and engagement.	Ongoing	Operations; IT; Customer Service; Engineering



# S1. Stakeholders & Stewardship: BUILD RECOGNIZED VALUE

**Objective:** Leverage a coherent brand and deploy communications best practices, building recognized value among external stakeholders.

**Measures:** We will know we are successful when...

- Hit targets (70% or better satisfied/neutral) in customer-based surveys and polling.

Initiatives	Target Date	Responsible Group
<p><b>District Value Scoreboard:</b> Understand best practices then assemble a surveys suite, engagement tools, and program calendar, regularly assessing customer and stakeholder value perceptions. Combine with call data, social media observations, and other information to make a “District Value Scoreboard”, tracking communications, brand, staff behaviors, rates effectiveness etc., toward hitting value targets.</p>	<p>Scoreboard created within 1 year</p> <p>Scoreboard revisited/ reviewed annually for possible updates</p>	<p>Assistant General Managers (Business Services; Engineering/Ops)</p>
<p><b>Transparent Scoreboard Reporting:</b> Develop meaningful content and publish relevant materials. Engage customers/stakeholders regarding the District’s project spending and District Value Scoreboard results (how the community values us). Understand the investment’s value and how customers benefit. The Value Scoreboard confirms the rates value is perceived.</p>	<p>Biennial</p>	<p>Community Affairs; Finance; Administrative Services</p>
<p><b>Become subject matter experts, industry event presenters, and industry publication contributors.</b></p>	<p>Annually</p>	<p>All Departments</p>
<p><b>Develop local business engagement outreach program.</b></p>	<p>2023</p>	<p>Purchasing; Operations; Engineering; Community Affairs</p>

## S2. Stakeholders & Stewardship: EXPAND COLLABORATION, INNOVATION & RELATIONSHIPS

**Objective:** Collaborate, innovate, and expand outside relationships.

- Measures:** We will know we are successful when...
- We have influenced outside entities that promote district policies or initiatives.
  - Generate the District’s mission and vision support among government, community, and business leaders.

Initiatives	Target Date	Responsible Group
<p><b>Collaborative Relationships with Peers, regional organizations and other industry agencies:</b> Identify and join/create multi-agency collaborations.</p> <ul style="list-style-type: none"> <li>• Provide local and regional public officials and community/opinion leaders with a clear and comprehensive explanation of water, wastewater, and water resource management issues.</li> </ul>	Quarterly	Executive Staff; (all departments involved); Government Relations
<p><b>Collaborative Relationships with Federal and State Legislators and Regulators:</b></p> <ul style="list-style-type: none"> <li>• Identify and participate in innovation opportunities with and influence legislators, regulators, policymakers, and other officials.</li> </ul>	Monthly reporting	Board of Directors; General Manager; Executive Mgmt.; Government Relations
<p><b>Participate and advocate in a broad range of water, wastewater, and water resource policy and regulatory issues with other agencies, industry organizations, and regional stakeholders.</b></p>	Ongoing	Board of Directors; Executive Mgmt.
<p><b>Elevate the District as an advocacy leader for water, wastewater, and water resource management issues</b> through participation in national, statewide and regional associations.</p>	Ongoing	Board of Directors; Executive Mgmt.

## S3. Stakeholders & Stewardship: PROTECT PUBLIC HEALTH & ENVIRONMENTAL RESOURCES

**Objective:** Protect and enhance public health and environmental resources.

- Measures:** We will know we are successful when...
- Meet or exceed public health regulations.
  - Reduce carbon footprint five percent by 2030.

Initiatives	Target Date	Responsible Group
<b>Anticipate new regulations.</b>	Ongoing	Water Resources; Engineering; Operations
<b>Stakeholder Engagement:</b> Educate the public about providing safe and reliable drinking water District initiatives. Promote and encourage District Water use vs Bottled Water.	Ongoing	Water Resources; Engineering; Community Affairs; Operations
<b>Evaluate climate and weather patterns and long-term impacts across EVMWD’s assets and services.</b>	2025	Assistant General Manager-Engineering & Operations
<b>Develop EVMWD’s carbon footprint reduction plan considering social trends and anticipated State- and Federal-level regulations.</b>	2025	Executive Mgmt.

# About this Strategic Plan

## Strategic Planning Primer

Joe Sterling provided a Strategic Planning Primer outlining the strategic planning and management concepts used during the planning process and reflecting the plan document structure and language. These tools represent the best and most widely adopted planning tools relevant for EVMWD. This helped keep best practice planning and management language consistent by referring to the Primer.

## Trends Analysis (PESTEL)

Conducted an industry trends analysis covering Political, Economic, Social, Technical, Environmental, and Legal topics facing water industry peers. Sourced analysis information from over 20 water district strategic plans and many more district websites, as well as industry publications and expert input.

## SWOTT (Strengths, Weaknesses, Opportunities, Threats, Trends)

A SWOTT analysis assessed the current internal and external conditions making up the strategic and tactical context for the planning process. All EVMWD staff and Board members who participated in the planning process developed the SWOTT analysis. For a more in-depth SWOTT explanation, see the Strategic Planning Primer and separate analysis-specific results.

## How to Evolve This Plan Over Time

Significant document edits (once first completed) will likely be made annually. Changes will most likely involve fine tuning the measures, fine tuning the objectives, and updating the initiatives. In the Strategic Planning Primer you'll find **monthly operational review** meeting suggestions compared to **quarterly strategic review** meetings. A process for the PESTEL, SWOTT, and plan element updates should be conducted annually. The 2020's will see more and accelerated industry and world changes, so testing all planning assumptions more frequently than in previous decades is prudent.

## Planning Process Used (December 2020 through June 2021)

**Phase 1: Planning to Plan** - This phase included designing a customized planning process for EVMWD based on leadership meetings. The Strategic Planning Primer was also customized and delivered to all planning participants. The process was coordinated with the GM and the branding consultants.

**Phase 2: Situation Analysis** – This phase included interviews with Board members and workshops to engage all staff. It produced the SWOTT analysis, a PESTEL analysis (Political, Economic, Social, Technical, Environmental, Legal), and other conditions and trends perspectives.

**Phase 3: Strategic Direction** – This phase included workshops with the Board, Staff, and brand consultant meetings. This phase produced mission, vision, values updates, and produced this document's objectives, measures, targets and initiatives.

**Phase 4: Complete Plan Document** – This phase included a review cycle whereby all staff and Board members had multiple review, fine tune, and plan ratifying opportunities. The final 2021 version of the plan reflects an unprecedented collaboration for EVMWD. The plan is the District's most comprehensive and implementable strategic management tool to date.

## Glossary of Common Acronyms

ACWA	Association of California Water Agencies
AM	Asset Management
AMI	Automated Metering Infrastructure
CalFire	Department of Forestry and Fire Protection
CASA	California Association of Sanitation Agencies
CIP	Capital Improvement Plan
CMMS	Computerized Maintenance Management System
CSDA	California Special Districts Association
DPR	Direct Potable Reuse
ERP	Enterprise Resource Planning System
GIS	Geographic Information System
HR	Human Resources
IPR	Indirect Potable Reuse
JPIA	Joint Powers Insurance Agency (part of ACWA)
R&R	Renewals and Replacements
SEMS	Security Environmental Management System (software suite from SEMS Technology)