



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion: Paul Clarke, Director of Operations and Water Quality
Report Period: FYE 2019

Strategic Goal #1: Provide Safe and Reliable Water, Recycled Water and Wastewater Services

Initiative	Key Success Measures	Performance in Achieving Success Measures Status, Comments and Exceptions
1.1 Maintain and Renew Assets	1.1.1 Continue the Predictive and Preventive Maintenance Program to meet established performance benchmarks	●
	1.1.2 Diligently manage and maintain current equipment and vehicle fleet to provide maximum value to the District	●
	1.1.3 Assess existing pipelines and associated equipment	●
	1.1.4 Select and implement a complete Computerized Maintenance Management System	●
1.2 Facilitate Strategic Capital Improvements	1.2.1 Perform ongoing replacement and improvement of existing infrastructure	●
	1.2.2 Update Comprehensive Facilities Master Plan	●
	1.2.3 Build Secondary Connection to better serve Eastern Service Area	●
	1.2.4 Continue to evaluate system interconnects with neighboring agencies	●
	1.2.5 Purchase two portable backup generators for remaining five pump stations	●
	1.2.6 Upgrade and modernize Ray Stoyer Water Recycling Facility (WRF) to ensure compliance	●
	1.2.7 Evaluate emerging technologies and consider implementation	●
	1.2.8 Provide a comprehensive backup transmission system to the Eastern Service Area	●
	1.2.9 Evaluate and develop strategies to reduce inflow and infiltration into the wastewater collection system	●
1.3 Infrastructure Security	1.3.1 Optimize security preparedness	●
	1.3.2 Identify, monitor, and resolve flood risks	●
	1.3.3 Enhance security measures at key remote sites	●
1.4 Emergency Preparedness	1.4.1 Continue to improve and refine the District's disaster recovery and critical operations	●
	1.4.2 Effectively communicate with outside agencies and emergency preparedness partners	●
	1.4.3 Train District personnel in National Incident Management System (NIMS) to recommended levels and ensure proficient use of Web-EOC software program	●
1.5 Ensure Excellence in Regulatory Compliance and Environmental Stewardship	1.5.1 Actively monitor new regulations and engage in the process	●
	1.5.2 Deliver services in accordance with standards set by regulatory agencies	●
	1.5.3 Enhance sustainability through minimizing waste in resources needed to continue to meet O&M objectives. Consider environmental impact on all business practices	●
	1.5.4 Update District Rules and Regulations and maintain annually	●

● Completed ● On Task ● Off Task ● At Risk ● Pending Funding



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Champion: Karen Jassoy, CFO/Director of Finance
 Report Period: Through June 2019

Strategic Goal #2: Ensure Fiscal Health and Competitively Sustainable Rates

<i>Initiative</i>	<i>Key Success Measures</i>	<i>Performance in Achieving Success Measures</i> <i>Status, Comments and Exceptions</i>	
2.1 Conduct Long Range Planning to Ensure Adequate and Reliable Revenue Stream	2.1.1 Employ functioning and responsive rate model capable of performing what-if scenarios	●	Developed reforecasted operating, capital equipment and CIP budget for FY '20-'22; received unanimous board approval. Forecasted actual results for FY '19 are positive and reserves are strong.
	2.1.2 Ensure rate structure is sound, tiered rates are defensible, and customer groups are charged appropriately	●	
	2.1.3 Increase revenue stability by recovering more fixed costs through fixed charges while maintaining fairness among customers and ensuring compliance with BMP standards	●	
	2.1.4 Flexible rate structure that allows the District to react to external factors and internal demands	●	
	2.1.5 Gain Board support for reasonable, necessary rate increases	●	
	2.1.6 Increase CIP budget and reserves to levels recommended in the 2017 Cost of Service Study	●	
2.2 Control Costs Diligently	2.2.1 Actively manage costs and "live within the household budget"	●	Staff continues to manage expenses; the reforecasted budget ties back to original approved budget total expenses.
	2.2.2 Ability to adjust spending in response to revenue fluctuations and restrictions	●	
	2.2.3 Water loss limited to 4% or less	●	
	2.2.4 Limit impact of unexpected expenditures on operations	●	
2.3 Manage Debt Responsibly	2.3.1 Preserve District's credit rating of AA- and qualify for favorable borrowing terms in the future	●	Staff continues to pursue low interest financing/grants for the AWP program. WIFIA application deadline is July 5. SRF update is due Dec 2019. District's credit rating remains stable AA by Fitch, AA+ by S&P. District is in compliance with reporting requirements for existing debt.
	2.3.2 Implement recommendations from the 2017 rate study	●	
	2.3.3 Use debt prudently to smooth out cash flows, stabilize rates and finance essential projects	●	
2.4 Provide Exceptional Financial Reporting to Internal and External Customers	2.4.1 Keep bills looking fresh and simple while providing sufficient information about charges and water use	●	Monthly financial report and full financial statement package posted to the Stream. Customer enrollment in Aquahawk and Electronic Billing continues to increase; current enrollment in Aquahawk is 12,500 and Electronic Bill Pay is 14,400.
	2.4.2 Ongoing dissemination of financial information including performance to budget, water sales and purchases, wastewater and park operations, and overall financial health of the District	●	
	2.4.3 Provide information to customers about internal versus external cost of services and pass through appropriate commodity increases from suppliers	●	
	2.4.4 Keep employees educated and involved in financial matters	●	
2.5 Manage and Enhance Technology and Systems Effectively	2.5.1 Information systems planning aligned with the District's Strategic Planning and Initiatives	●	Windows 10 PCs deployment to all workgroups complete. Began migrating all user email accounts from on-site to Exchange online. New virtual servers provisioned for the CIS infinity upgrade. Munis 11.3 upgrade completed. Performed email vulnerability testing campaigns and follow-up online user awareness training and USB drive vulnerabilities. Staff working with WRF workgroup replacing WRF maintenance software. Staff working with park and operations workgroups replacing park maintenance software and sewer video monitoring software with GIS integrated solutions. Migrated remote users from old to new VPN. Began configuration and testing of Office 365 online meeting and collaboration tools, i.e. Skype.
	2.5.2 Technology used to increase staff efficiency and operational savings	●	
	2.5.3 Information system support of effective decision making, system integration, reliable data and decreased redundancy	●	
	2.5.4 Expand and improve use of mobile computing and communication technology	●	
	2.5.5 Enhanced cyber security	●	
	2.5.6 Ensure secure data access, remote access and valid customer data	●	

● Completed ● On Task ● Off Task ● At Risk ● Pending Funding



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion(s): Melissa McChesney, Communications Officer
Report Period: FYE 2019

Strategic Goal #3: Enhance Customer Communications and Education

<i>Initiative</i>	<i>Key Success Measures</i>	<i>Performance in Achieving Success Measures</i> <i>Status, Comments and Exceptions</i>	
3.1 Provide Quality and Responsive Service to Enhance Customer Experience	3.1.1 Cultivate a strong customer service focus through communicating and engaging with the community on matters important to our region	●	AWP post-tour surveys continue to share that customers are learning more about our program and potable reuse during tours, further expanding support and acceptance. We have been working with part of our Eastern Service Area to share information about the Mountain View Pipeline Project. Outreach efforts have helped share key information and gather input from the community.
	3.1.2 Survey customer groups involved in water-related events (e.g., construction activities, service interruptions, water quality changes, emergencies, and other important issues) for the purpose of hearing about the customer experience and determine if Padre Dam can make any improvements to the way the event is being handled	●	
	3.1.3 Ensure 100% of Padre Dam staff has access to informational materials so they are able to provide customers with current, accurate, and consistent information	●	
3.2 Educate Customers on Water Issues and Water Usage	3.2.1 Create and implement a customer education program with easily understood information about District infrastructure, water quality, financials, and/or future water issues	●	We continue to use the Value of Water concept in our outreach to customers. Our Padre Profiles program highlights a different employee every other month. This employee is highlighted through social media, customer e-newsletters and on the District website. AWP Tours have continued with a busy spring. With completion of the AWP IFA we will be ramping up our outreach again to share the next steps towards implementation with the public.
	3.2.2 Promote customer understanding of water supply issues	●	
	3.2.3 Increase customer understanding of water costs and impacts on rates	●	
	3.2.4 Educate customers on Advanced Water Purification Program (AWPP)	●	
3.3 Enrich Customer Communication and Provide User-Friendly Service	3.3.1 Use technology effectively to increase access to District information and public meetings	●	Social media engagement continues to grow. We have implemented a couple of social media contests to expand engagement on social. Additionally, we have successfully used Facebook ads to promote key posts to expand our audience reach. Enrollment in our online water use portal, Aquahawk is currently at 54%.
	3.3.2 Continually increase number of followers on Padre Dam website and social media forums	●	
	3.3.3 Invest in business process changes and technologies that promote customer care, convenience, and self-service	●	
	3.3.4 Provide customers with measuring and monitoring tools to enhance awareness of water usage and potential water leaks. Achieve 70% enrollment by 2021	●	
3.4 Cultivate Positive Community Relations and Partnerships	3.4.1 Cultivate supportive and positive relationships with federal, state and local agencies that may impact District operations	●	AWP Program Partnerships continue to be strong as seen through recent IFA approvals. Staff recently submitted papers for the WIFIA LOI program.
	3.4.2 Cultivate positive relationships with key industry professionals to stay informed and gather feedback	●	
	3.4.3 Pursue grants and projects that would mutually benefit District customers and those of other local agencies	●	
3.5 Foster Positive Media Relations	3.5.1 Write and distribute press releases in a timely manner to communicate topics important to the community with a goal of no fewer than four (4) instances of positive media coverage per calendar year	●	Continuing relationships with the media. Most recent media coverage has been on the AWP IFA agreements which was covered by the Union Tribune and East County Magazine.
	3.5.2 Develop and enhance media relationships	●	
3.6 Legislative Advocacy	3.6.1 Identify and influence legislation that affects movement towards the District's vision	●	Key topics during this legislative session have included: State Water Tax, Water/Wastewater training for Veterans, and Potable Reuse Terminology. We continue to remain engaged as the legislative session continues. Additionally, Governor Newsom is launching a Water Resiliency Portfolio Program which we will follow and engage in as it moves forward.
	3.6.2 Further cultivate positive relationships with city, county, state and federal legislators	●	
3.7 Continue District-Wide Transparency	3.7.1 Continue to provide comprehensive information on the website and Stream	●	News spotlights are updated on the website at least monthly. Promotion of Aquahawk continues to encourage more customers to view water use online. Pipeline News and other Stream articles and recognitions are posted monthly and as applicable. Staff is creating talking points to be shared at Chamber and EDC meetings by the Board representative.
	3.7.2 Continue to provide training to the Board of Directors and employees	●	

● Completed ● On Task ● Off Task ● At Risk ● Pending Funding



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion: Mark Niemiec, Director of Engineering and Planning
 Report Period: FYE 2019

Strategic Goal #4: **Increase Water, Wastewater and Energy Independence**

Initiative	Key Success Measures	Performance in Achieving Success Measures Status, Comments and Exceptions
4.1 Increase Local Water Supply up to 25% of Current Demand	4.1.1 Explore potable reuse options	● Elected official approval of the Term Sheet Addendum (Product Water Pricing) and the Interim Funding Agreement (IFA) confirms the commitment of all partners to expand local water supplies.
	4.1.2 Affirm and further develop partnering opportunities to expand local water supply	●
	4.1.3 Position Padre Dam to be the leader in potable reuse	●
	4.1.4 Evaluate financial feasibility and rate payer affordability of local water supply project(s)	● Upcoming industry day in mid-August will provide notice to prospective designers and contractors regarding the initiation of a selection process for the progressive design build (PDB) of the ECAWP.
	4.1.5 Implement selected water supply project(s)	● Approximately \$36M in grants have been obtained for the ECAWP project. On behalf of the ECAWP JPA, District staff recently submitted a letter of interest (LOI) for WIFIA funding and is preparing a feasibility study to be submitted to the US Bureau of Reclamation (USBR) seeking eligibility for funding through the WIIN grant program.
4.2 Offload Wastewater Flow to Point Loma WWTP to the Maximum Extent Possible	4.2.1 Expand Ray Stoyer Water Recycling Facility (WRF) up to 15 MGD	● Development of a regional wastewater treatment plant capable of handling up to 15 million gallons per day continues to progress. Two separate agreements are being developed to further the WRF expansion and secure partnerships. A Joint Powers Authority (JPA) agreement and a Wastewater Services Agreement.
	4.2.2 Optimize utilization of available Title 22 water	●
	4.2.3 Diligently control wastewater treatment project costs	● The JPA will be the governing body for the project and will be comprised of the three wastewater agencies (Padre Dam, the County of San Diego, and the City of El Cajon). The JPA will hold the contracts for financing, design, construction, and operation and maintenance of the Project. Each of the wastewater agencies will have an agreement with the JPA for wastewater treatment and disposal.
4.3 Increase Use of Sustainable Energy Sources and Optimize Energy Efficiencies	4.3.1 Add solar panels to district facilities and convert low electrical use sites to solar	● A study is currently underway to determine the feasibility of installing solar panels on the District's campus.
	4.3.2 Evaluate hybrid/electric technology opportunities	●
	4.3.3 Explore bio-fuel opportunities	● Although waste management declined the opportunity to participate in a feasibility study with the District to explore co-digesting municipal biosolids and diverted organics, space on-site will be included for a future high strength waste receiving station to accommodate co-digestion and energy recovery facilities.
	4.3.4 Reduce overall energy consumption associated with District facilities by 10% from 2012 levels	●
	4.3.5 Evaluate opportunities to minimize greenhouse gas emissions in District operations	●
4.4 Support Regional Water Supply Reliability	4.4.1 Advocate the development of regional desalination facilities	● The District currently monitors legislative measures for recycled water regulations and potable reuse. A couple highlights include support for Otay/SDCWA sponsored AB 1588 on water-wastewater training for Veterans and AB 292 related to potable reuse terminology.
	4.4.2 Advocate the development of regional potable reuse projects	●
	4.4.3 Support / advocate regional development of local water supply and reduce reliance on imported supply	●
	4.4.4 Explore development of storm water reuse	● Staff continues to work with WateReuse California to follow key topics.
	4.4.5 Advocate and support water supply to local tribes	●
4.5 Support Regional Wastewater	4.5.1 Negotiate and finalize wastewater transport agreements	● Discussions continue with El Cajon, County Sanitation District, and City of San Diego regarding the allocation and operations and future capital costs related to the East Mission Gorge Pump Station (EMGPS).
	4.5.2 Develop appropriate regional billing for Secondary Equivalency	●
	4.5.3 Reduce contract capacity at Point Loma Wastewater Treatment Plant	● District staff has participated in the initial Pure Water Phase 2 planning efforts to determine the appropriate alternatives worthy of further evaluation while considering capacity at Point Loma WW treatment plant.

● Completed ● On Task ● Off Task ● At Risk ● Pending Funding



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion(s): Lisa Sorce, Director of Human Resources
 Report Period: Through June 30, 2019

Strategic Goal #5: **Maintain Workforce Excellence**

<i>Initiative</i>	<i>Key Success Measures</i>	<i>Performance in Achieving Success Measures Status, Comments and Exceptions</i>	
5.1 Develop and Train Our Future Leaders	5.1.1 On an ongoing basis, 100% employees have clearly defined job related goals stated on their performance evaluation	●	
	5.1.2 On an ongoing basis, 40% of employees have a clearly outlined development plan	●	
	5.1.3 Develop and launch Padre Dam University	●	
	5.1.4 Every two years, ensure employees commit to understanding and adhering to Padre Dam's Ethics Policy	●	
	5.1.5 Publish employees' education/certification accomplishments	●	
	5.1.6 Hold regular GM dialogue sessions	●	
5.2 Nurture and Affirmation of Workforce Partnership/ Collaborative Relationships	5.2.1 On a monthly basis, 95% of employees log on to the Stream	●	Stream Engagement has remained consistently high at 95%. In addition, as of 06/30/19, we have 30 active laterals working on District projects/issues. The Basin is continuing to work through the results from the focus groups we did last fall to evaluate the effectiveness of the Workforce Partnership.
	5.2.2 Continue to offer tours of District facilities to employees	●	
	5.2.3 Departments are encouraged to form laterals to discuss issues related specifically to their areas	●	
	5.2.4 Basin holds periodic meetings to ensure informed oversight of the pipeline program	●	
	5.2.5 Every three years, formally evaluate that the workforce partnership process is effective	●	
	5.2.6	●	
5.3 Cultivate Positive Culture and Teamwork	5.3.1 Lines of communication are open for all employees	●	
	5.3.2 Employees experience camaraderie and teamwork through on-site employee events	●	
	5.3.3 Focus on maintaining high employee morale and positive organization culture	●	
	5.3.4 Values and mission statements are the drivers of the workforce partnership	●	
	5.3.5 Training and development from onboarding to retirement	●	
	5.3.6 Ensure our workforce is ready to embrace generational differences	●	
5.4 Recruit and Retain	5.4.1 Ongoing evaluation of compensation and benefits to ensure competitiveness and sustainability	●	Turnover for the Fiscal Year was 3.7% for Padre Dam and 22.4% at Santee Lakes.
	5.4.2 No more than 5% turnover due to resignations or terminations, not including retirements	●	
	5.4.3 Formalize and develop a District-wide internship program to create a Padre Dam presence in local schools and community	●	
5.5 Ensure Employee Safety and Security	5.5.1 Educate employees	●	Safety training for employees remains a priority. Training this year included: confined space rescue training, AC pipe handling, HAZWOPER, active shooter training, daily stretching and weekly tailgate safety trainings. As of 7/1/19, the X-MOD decreased slightly from 1.30 to 1.27
	5.5.2 Maintain or improve experience modifier (X-MOD)	●	
	5.5.3 Be a "Best Practice Company"	●	
	5.5.4 Supervisors and lead workers demonstrate their commitment to safe work practices	●	
	5.5.5 Maintain 100% non-litigation rate on Workers' Compensation claims	●	
	5.5.6 Ongoing oversight of District Security Program	●	
5.6 Encourage Employee Wellness	5.6.1 Develop and implement a comprehensive, District-wide Employee Wellness Plan	●	The District's wellness plan (Padre Fit) just completed its second year and participation has been excellent! For FY19, 91 employees participated in at least one Padre Fit! Activity and 27 employees participated in at least 3 activities.
	5.6.2 Maintain management team's support of wellness initiatives	●	
5.7 Access for the Disabled	5.7.1 Remove barriers to access District-wide where warranted as remodeling or new construction occurs	●	
	5.7.2 Access for the disabled in all District facilities and programs, where warranted	●	
	5.7.3 Prompt resolution of ADA complaints	●	

● Completed ● On Task ● Off Task ● At Risk ● Pending Funding



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion(s): Laura Koval, Director of Park and Recreation
 Report Period: FYE 2019

Strategic Goal #6: **Expand Park and Recreation Opportunities**

<i>Initiative</i>	<i>Key Success Measures</i>	Performance in Achieving Success Measures <i>Status, Comments and Exceptions</i>	
6.1 Research and Develop Dynamic Vision Plan	6.1.1 Develop comprehensive plan to enhance Santee Lakes	●	The General Store/Administration Building Project (GSAB), and Relocation of the Fish cleaning Station are elements of the Dynamic Vision Plan that are currently moving forward with construction.
	6.1.2 Proceed with Capital Improvements based on Dynamic Vision Plan	●	
6.2 Enrich the Customer Experience through Enhanced Park Services and Recreation Programs	6.2.1 Stay current with technology	●	The Park received new computers with Office 365.
	6.2.2 Expand product variety at the General Store	●	Currently reducing variety of store products to prepare for temporary store operation during construction. Currently offering a discount to Santee residents to increase reservations.
	6.2.3 Evaluate Picnic Program to increase revenue	●	
	6.2.4 Maintain and build on our relationships with City of Santee and other community service groups to increase recreational programs, i.e., day camps, scout campouts, ADA camps, art walks, fitness programs, fishing derby	●	Partnered with the City of Santee on the Eggstravaganza, City of Santee Firefighters Fishing Derby, I Love a Clean San Diego (Green Day), 1,000 Water Lantern Festival.
	6.2.5 Add the Food Cart / Snacklebox to the fleet of vehicles	●	
	6.2.6 Enhance pedestrian and visitor safety	●	Paving and striping of the roadway/parking lot by the Clubhouse and Swimming Pool Complex
6.3 Conduct Marketing and Community Outreach	6.3.1 Develop strategies to improve awareness of Santee Lakes	●	Santee Lakes staffed a booth at the Santee Street Fair.
	6.3.2 Utilize customer surveys to gather data on ideas of enhanced / improved programs and services	●	Camper exit survey available. Results are reviewed by staff.
6.4 Maintain Commitment to Financial and Environmental Sustainability	6.4.1 Environmental: Develop recycling policies and procedures for the Park	●	Purchased Volgistics software to assist with managing the volunteer program
	6.4.2 Environmental: Utilize green services in Park designs	●	
	6.4.3 Financial: Enrich Volunteer program	●	
	6.4.4 Financial: Promote Santee Lakes Foundation awareness and increase funding	●	
	6.4.5 Financial and Environmental: Research, apply for, and obtain grants to assist in sustainability efforts	●	
	6.4.6 Financial and Environmental: Design a sustainability education program	●	
6.5 Conduct Preventive and Predictive Maintenance	6.5.1 Implement and maintain an aggressive capital improvement and equipment replacement process	●	The Park moved to GreenCity GIS for asset management.
	6.5.2 Continue preventive and predictive maintenance program using GIS based software	●	
	6.5.3 Evaluate the current preventive and predictive maintenance program	●	
	6.5.4 Organize and maintain tools / supplies used for general maintenance activities	●	
6.6 Commit to Employee Excellence	6.6.1 Develop and train staff	●	Park Operations Staff attended Electrical Safety Training.

● Completed ● On Task ● Off Task ● At Risk ● Pending Funding