



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion: Paul Clarke, Director of Operations and Water Quality
Report Period: Through December 2018

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



2012-2022 STRATEGIC PLAN PROGRESS REPORT

Champion: Karen Jassoy, CFO/Director of Finance
Report Period: Through December 2018

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

<i>Initiative</i>	<i>Key Success Measures</i>	<i>Performance in Achieving Success Measures 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	●	Financial analysis to determine the impact and viability of no internal rate increase was completed. Staff recommended, and the Board approved, forgoing the internal rate increase planned for FY '19, giving customers some rate relief. Potable Water, Sewer and Park's performance are strong compared to budget while Recycled Water operation is just under budget but has healthy reserves.
	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 has been managing expenses well with all operations' operating expenses favorable to budget.
	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 has been actively working to secure funding for the Advanced Water Purification program. 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 11,502 and Electronic Bill Pay is 14,200.
	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 and laptops deployed to Customer Service, AMI workgroup, Finance, IS/GIS, Engineering Admin and WRF. All users provisioned for Office 365. Access to online office apps & Office 365 home use established. Upgraded virtual environment hosts and storage to support additional servers required by Munis, OnBase, and upcoming CIS Infinity update. Munis 11.3 continued testing and report conversion in progress for New Year go-live. Cyber security user awareness vulnerability and training campaigns. Completed initial user vulnerability baseline testing. Performed multiple email vulnerability testing campaigns and follow-up online user awareness training.
	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: Through December 2018

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	●	Positive feedback on District tours has been received. The District tours program continues to build positive community ambassadors for the District. Our next set of tours is scheduled for March and April.
	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	●	AWP Tours are continuing. Winter and Spring tours are filling up with a lot of interest from school groups.
	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	●	A redesigned District website was rolled out to make it more modern and user friendly for customers. Social media engagement continues to grow.
	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. The District is also continuing to build our relationships with community officials, State officials and elected officials to ensure they know about and support this important program. Working with the State Water Board on additional SRF funding opportunities for the AWP.
	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 was on the AWP CEQA approval.
	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 we are currently engaged on include: State Water Tax, Low Income Water Rate Assistance Programs, and Water Efficiency Legislation implementation. We continue to remain engaged as the new legislative session gets going.
	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	●	New website was launched in September 2018. Pipeline News and other Stream articles and recognitions are posted monthly and as applicable.
	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: Al Lau, Director of Engineering
 Report Period: Through FYE 2018

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

Initiative	Key Success Measures	Performance in Achieving Success Measures <i>Status, Comments and Exceptions</i>
4.1 Increase Local Water Supply up to 25% of Current Demand	4.1.1 Explore potable reuse options	●
	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)	●
	4.1.5 Implement selected water supply project(s)	●
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	●
	4.2.2 Optimize utilization of available Title 22 water	●
	4.2.3 Diligently control wastewater treatment project costs	●
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	●
	4.3.2 Evaluate hybrid/electric technology opportunities	●
	4.3.3 Explore bio-fuel opportunities	●
	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	●
	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	●
	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	●
	4.5.2 Develop appropriate regional billing for Secondary Equivalency	●
	4.5.3 Reduce contract capacity at Point Loma Wastewater 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 December 2018

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	●	In July of 2018, we implemented Module 1 of the Management Readiness Training Program. We currently have 41 active participants.
	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	●	In November/December of 2018, we engaged David Berry to hold employee focus groups to assess 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	●	We are working on the development of a formal internship program. In the meantime, we informally take interns when possible depending on department needs.
	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: some of the training this year included confined space rescue training, AC pipe handling, HAZWOPER, Active Shooter training, daily stretching and weekly tailgate safety trainings. As of 7/1/18, the X-MOD increased to 1.30. Although most of our WC injuries in FY17/18 were relatively minor in nature, the frequency of the minor claims in FY17/18 is a contributing factor to this increase in FY18/19.
	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) is in its second year and participation has been excellent!
	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: Through December 2018

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

<i>Initiative</i>	<i>Key Success Measures</i>	<i>Performance in Achieving Success Measures Status, Comments and Exceptions</i>	
6.1 Research and Develop Dynamic Vision Plan	6.1.1 Develop comprehensive plan to enhance Santee Lakes	●	Cabins Back-up Generator Pool Improvement Project
	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	●	Added additional RV supplies to the General Store Opened seven new picnic areas in the Park. Presence at a wedding expo. Maintained relationship with Camp Wana Cura, Kiwanis Club of Santee, Lions Club, Expressions Dance and Movement Center to facilitate events. Seal and restripe asphalt parking areas Lakes 1,2, and 3
	6.2.2 Expand product variety at the General Store	●	
	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	●	
	6.2.5 Add the Food Cart / Snacklebox to the fleet of vehicles	●	
	6.2.6 Enhance pedestrian and visitor safety	●	
6.3 Conduct Marketing and Community Outreach	6.3.1 Develop strategies to improve awareness of Santee Lakes	●	Booth at Santee Street Fair – 30,000 in attendance. Booth at Holiday Tree Lighting at City of Santee. Improved posting schedule for social media. Collected customer survey responses at Santee Street Fair. Camper exit survey available. Results reviewed by staff.
	6.3.2 Utilize customer surveys to gather data on ideas of enhanced / improved programs and services	●	
6.4 Maintain Commitment to Financial and Environmental Sustainability	6.4.1 Environmental: Develop recycling policies and procedures for the Park	●	Signage added to dumpster enclosures. Launched NeoGov for Volunteer applications/recruitment. Received Circle 2.0 Tree Grant for 158 trees, maintained by WCA for 3 years.
	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	●	Move to GreenCityGIS 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	●	PDMWD Leadership Training attendance by staff.

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