



# South Coast Water District

*Providing Quality Water and Wastewater  
Services to the Coastal Communities*

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## STRATEGIC PLAN REVISED & UPDATED SECTIONS (2007-2012)

### WATER IS OUR FOCUS

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#### Mission, Vision, Values

**Mission:** South Coast Water District is dedicated to providing the highest quality drinking water, recycled water, and sanitary sewer services to our customers in an efficient, environmentally-sensitive, and financially-responsible manner.

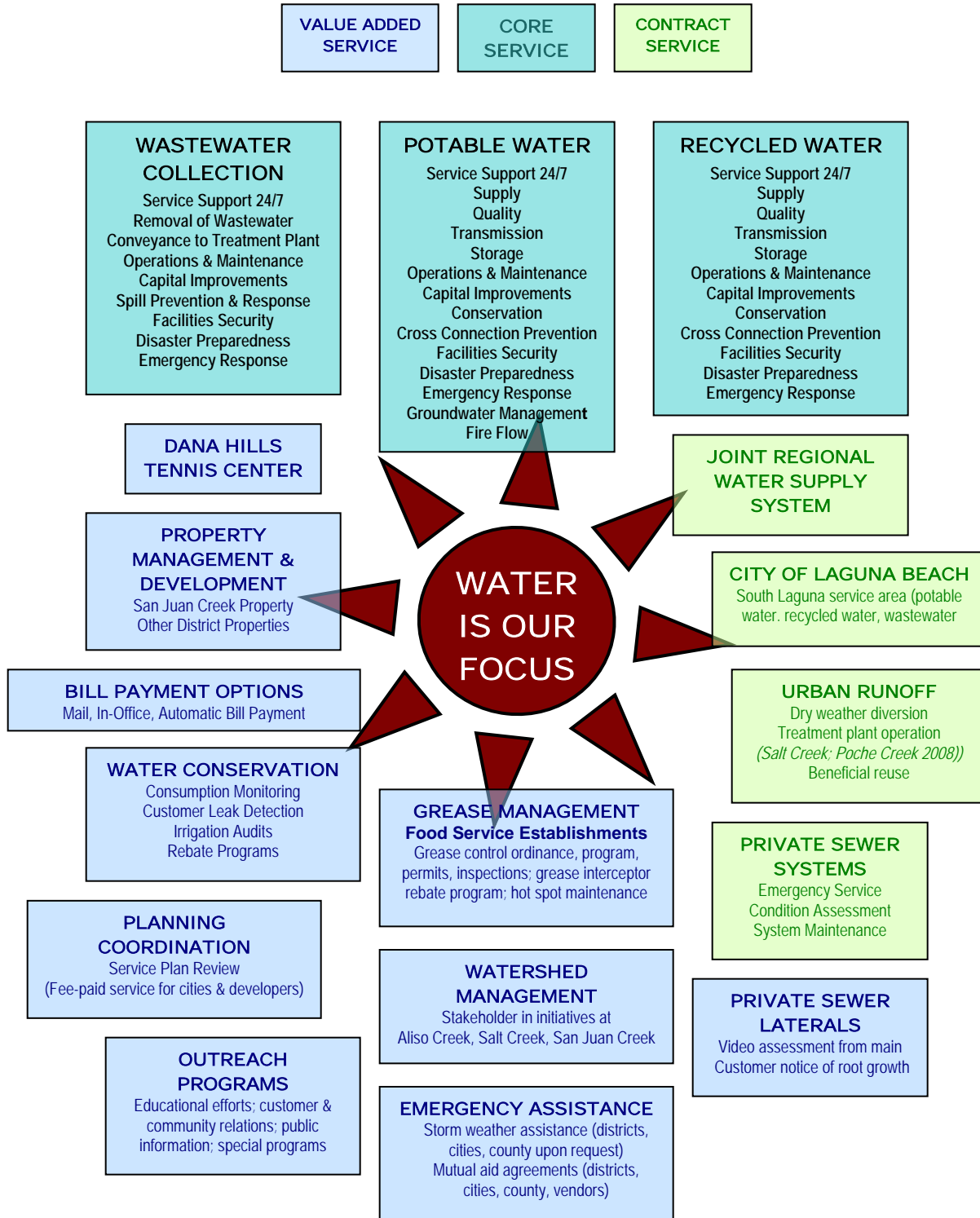
**Vision:** Water is our focus -- and our focus is our strength. Whether it's potable water, recycled water or wastewater, it's "H<sub>2</sub>O," and South Coast Water District manages this vital resource for the public in an effective and comprehensive way as a local government agency.

**Values:** South Coast Water District employees interact with customers, the community, and co-workers in a courteous, cooperative, and responsive manner.

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# CURRENT SERVICES

(Updated April 2007)



<b>RETAIL CUSTOMER ACCOUNTS</b> Residential/Commercial (Updated January 2007)		
South Coast Water District Service Area	Customer Accounts	
	WATER SERVICE	SEWER SERVICE
<b>City of DANA POINT</b> <i>(Service provided to nearly 100% of the city)</i>	8,963	8,373
<b>City of LAGUNA BEACH – South Laguna</b> <i>(Service provided from Nyes Place to the border of Dana Point)</i>	3,129	2,977
<b>City of SAN CLEMENTE</b> <i>(Service provided to a limited area in northern San Clemente)</i>	267	144
<b>City of SAN JUAN CAPISTRANO</b> <i>(Service provided to a limited area in northern San Juan Capistrano)</i>	None	128
<b>TOTAL RETAIL ACCOUNTS</b>	12,359	11,622

<b>WHOLESALE CUSTOMERS</b> Joint Regional Water Supply System Operated, maintained and administered by South Coast Water District	
<b>Orange County</b> 1. City of San Juan Capistrano 2. City of San Clemente 3. Irvine Ranch Water District 4. El Toro Water District 5. Moulton Niguel Water District 6. South Coast Water District	<b>San Diego County</b> 7. Camp Pendleton 8. San Onofre State Park 9. San Onofre Nuclear Generating Station

## DISTRICT PRIORITIES (2007-2012)

The Board of Directors and executive management team reached consensus on the priority initiatives that are critical for the District to achieve in the next five years. These top 10 initiatives (below) were distilled from many identified at the Board Workshop on November 3, 2006 and they form the basis for updates to the Strategies and Action Plans section of the original plan. All of the priorities below constitute Tier I priorities.

Ranking (1-10)	TIER I PRIORITIES Next 5 years	Board Workshop Comments Nov. 3, 2006
1	WATER / WASTEWATER FACILITIES MASTER PLAN	10-year plan for potable and recycled water and wastewater infrastructure and financing.
2	FINANCIAL MANAGEMENT & PLANNING	Includes evaluation of rate structure, asset equalization, connection fees, long-term financing and reporting.
3	DISTRICT OPERATIONS FACILITY	Consolidated facility on San Juan Creek property bringing together workers in five locations in three cities.
4	TUNNEL STABILIZATION & PIPELINE PROTECTION	Rehabilitation of two miles of deteriorated sewer tunnel from Three Arch Bay to Aliso Beach.
5	INCREASED WATER STORAGE	Meet seven-day supply goal.
6	CUSTOMER REQUIREMENTS	Identify customer requirements (wants and needs) related to services, rates, District initiatives and public information.
7	STAFF RETENTION & TRAINING	Plan for long-term employee base.
8	SAN JUAN CREEK PROPERTY	Highest and best use of the land in the coastal zone, based on Board goals.
9	LEVERAGE TECHNOLOGY	Optimize customer service and organizational efficiency through use of technology.
10	EMERGENCY RESPONSE PLAN & TRAINING	Develop Emergency Response Plan and Emergency Operations backed by thorough training and exercises.

## DISTRICT GOALS (2007-2012)

The Strategies and Action Plans that follow support the District in achieving its fundamental goals as a public agency: to provide quality drinking water, recycled water and sanitary sewer services to customers in an efficient, environmentally-sensitive and financially-responsible manner.

<ol style="list-style-type: none"> <li>1. Meet or exceed <b>customer service</b> requirements.</li> <li>2. Ensure <b>facilities reliability</b> for water, wastewater and recycled water services.</li> <li>3. Protect public health and the environment by preventing <b>sanitary sewer overflows</b> and meeting <b>water quality</b> standards.</li> </ol>	<ol style="list-style-type: none"> <li>4. Ensure <b>water reliability</b> by addressing water supply, storage and conservation.</li> <li>5. Keep customers, public and stakeholders <b>informed</b> and solicit their input.</li> <li>6. Promote an efficient and <b>productive workforce</b>.</li> <li>7. <b>Attract and retain</b> a skilled workforce.</li> <li>8. Ensure and enhance <b>financial management</b>.</li> </ol>
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## DISTRICT STRATEGIES (2007-2012)

### TIER I STRATEGIES RANKED

1. Develop **Water/Wastewater Master Plan**.
2. Ensure excellent **financial management** and rate management.
3. Construct an **operations facility** on San Juan Creek that brings together workers, vehicles and inventory in 5 locations in 3 cities.
4. Rehabilitate the two-mile **tunnel** in South Laguna which house a sewer line that carries 1.1 million gallons a day of wastewater for treatment **(new)**
5. Evaluate and plan for potable **water storage** to meet the 7-day local storage goal set by Metropolitan Water District of Southern CA
6. Identify **customer requirements** (wants and needs) regarding District services, rates, initiatives, and public information and implement changes as appropriate.
7. Attract, train and retain a **skilled workforce**.
8. Develop and manage **San Juan Creek property** and other District properties to maximize benefits to customers and the community.
9. Leverage **technology** to support the continued provision of excellent customer service.
10. Develop and implement an **Emergency Response Plan** and Multi-Hazard Mitigation Plan **(new)**

### TIER II STRATEGIES UNRANKED

11. Comply with **sanitary sewer collection regulations**, orders, and standards in the interest of public health and the environment.
12. Comply with **water quality regulations**, orders, and standards in the interest of public health, safety and the environment.
13. Establish plans to ensure an adequate, diversified **water supply**.
14. Promote **water conservation** in compliance with voluntary CA Urban Water Conservation Council Best Management Practices.
15. **Communicate** key information to customers and the public.
16. Maximize the opportunity for **the public to participate** in meetings by periodically evaluating location, time, and potential broadcast.
17. Provide diversions, treatment plant operations, and beneficial reuse of **runoff** under contract to cities and the county, as feasible.
18. Participate as a stakeholder in **watershed initiatives** to ensure the maintenance and protection of the public water and sewer system.
19. Assess **vulnerability** and security of facilities to human threat and natural disaster, develop plans and implement
20. Operate the **Joint Regional Water Supply System** under contract, which brings imported water to south OC from Metropolitan.
21. Explore **partnership opportunities** with regional agencies and local governments. **(new)**
22. Foster excellent relations with regional, regulatory and **governmental agencies**.
23. Foster excellent relations with **non-governmental organizations** (NGOs), civic organizations and community groups.
24. Enhance **employee communications**.
25. Optimize the District's structure, processes and **performance**.
26. Manage the Dana Hills **Tennis Center** at the District's reservoir for the benefit of customers and the public. **(new)**
27. Develop and implement a **strategic plan**.

# DISTRICT STRATEGIES & ACTION PLANS (2007-2012)

## TIER I PRIORITIES -- RANKED (10)

### STRATEGY 1

Develop Water/Wastewater Facilities Master Plan.

#### Action Plans

*Lead: Engineering Department*

- A) Conduct **Master Plan study** of potable water, recycled water and wastewater facilities (in progress, complete Nov. 2007). The study will include, but not be limited to, the following areas:
  - 1) Water distribution system (imported and groundwater)
  - 2) Water storage needs and facilities
  - 3) Hydraulic modeling for the wastewater collection system
  - 4) Redundant sewer force mains
  - 5) Expansion of recycled water service in our service area
  - 6) Expansion of recycled water sales to adjacent agencies and cities
  - 7) Assessment of the potential and value of purchasing capacity in the planned Advanced Wastewater Treatment plant at the J.B. Latham Wastewater Treatment Plant.
- B) Recommend **10-year capital improvement program** (08/09)
- C) Develop **financial plan** for 10-year capital improvement program (08/09)
- D) Implement **capital improvements** according to schedule
- E) **Update Facilities Master Plan** every 10 years and conduct periodic reviews
- F) Create **Asset Management Plan** based on data from the Water/Wastewater Facilities Master Plan, the Geographic Information System and the Computerized Maintenance Management System (*Engineering with Operations*)
- G) Implement **Geographic Information System** for potable water, recycled water and wastewater facilities. See Strategy 9C under "Leverage Technology to support the continued provision of excellent customer service." (*Engineering with IT support*)

## STRATEGY 2

Ensure excellent financial management and rate management.

### Action Plans

#### **I Financial Management & Planning**

*Lead: Administration Department (Finance)*

- A) Develop **financial plan for 10-year capital improvement program** (in progress, see Strategy 1C, “Develop Water/Wastewater Facilities Master Plan.”)
- B) Update and revise the **procurement policy**.
- C) Ensure **internal controls** are in place to safeguard assets and provide accountability (in progress)
- D) **Streamline budget** detail and documentation (in progress)
- E) Improve financial **documentation and reporting** (in progress)
- F) Manage and invest cash to **maximize yield** (continuing)
- G) Capitalize on opportunities to secure **local, state and federal funding** (in progress)
- H) Seek opportunities to **contain costs**
  - 1) Conduct an **energy audit** as the cost of gas and electric continue to rise
  - 2) Pursue **cooperative project development** with other agencies (ongoing)
  - 3) Outsource work requiring **specialized expertise** (ongoing)
- I) Replace and upgrade the District’s **financial management system** (planning underway, see Strategy 9F, “Leverage technology to support the continued provision of excellent customer service.”)

*Action plans completed since Nov. 2003*

*Consolidate budget from five financial zones to one*

*Develop plan to safeguard property tax receipts*

*Seek opportunities to improve loan repayment terms and to refinance bonds*

*Lower outside accounting costs (completed and ongoing)*

*Develop documented reserve and investment policies*

#### **II Rate Management: Establish rates, fees and charges that are fair, equitable, and predictable.**

*Lead: Administration Department (Finance with Customer Service & Public Information)*

- A) Review rate structure to **assess rate sufficiency** (under contract, in progress)
- B) Review **asset equalization charge effectiveness** (under contract, in progress)
- C) Develop new **connection fees** and charges (07/08)
- D) Monitor the financial impact of anticipated **rate increases from Metropolitan** for our imported water, which will represent more than 90% of our supply portfolio after the Groundwater Recovery Facility is online.

Action plan completed since Nov. 2003

*Conducted rate structure study that included a multi-year rate plan and conservation-based usage rates*

*Conducted public hearings on proposed rate change and secured Board approval (effective Nov. 1, 2004)*

*Implemented restructured rates in three phases (Nov. 1, 2004; July 1, 2005; July 1, 2006)*

### **STRATEGY 3**

Construct an Operations Facility on San Juan Creek property that brings together workers, vehicles and inventory in five locations in three cities.

#### **Action Plans:**

*Lead: Engineering Department*

A) Construction start (estimated 07/08)

B) Facility completed (target 2010)

Action plans completed since Nov. 2003

*Determined location for the Operations Facility*

*Raised property above the flood plain*

*Completed needs assessment of employee, vehicle and inventory requirements*

*Selected architectural style*

### **STRATEGY 4-NEW**

Rehabilitate the two-mile tunnel in South Laguna which houses a sewer line that carries 1.1 million gallons a day of wastewater for treatment. *(new strategy)*

#### **Action Plans**

*Lead: Operations Department*

A) 2007 emergency repairs on 800 foot section of tunnel at 1000 Steps Beach (in progress, complete 2007)

B) Rehabilitation of the balance of the tunnel from Three Arch Bay to Aliso Beach (report on potential options and reach decision - 07/08)

Action plans completed since Nov. 2003

*Assessed tunnel condition, completed engineering design*

*Conducted CEQA review for the emergency work*

*Hired construction manager, secured required permits*

*Solved problem of materials delivery (work boat)*

*Mobilized the work site, secured OSHA approval*

*Began tunnel repair work in January 2007*

## STRATEGY 5

Evaluate and plan for potable water storage to meet the seven-day local storage goal set by the Metropolitan Water District of Southern California.

### Action Plans

*Lead: Engineering Department (with General Manager and Finance)*

- A) Maintain potable water **storage capacity of 33.9 million gallons** (21.6 million gallons in 14 local reservoirs and 12.3 million gallons in the regional Bradt Reservoir), which represents five days local storage for our service area.
- B) Assess District's **overall water storage needs** in the Water/Wastewater Facilities Master Plan, see Strategy 1 (in progress).
- C) Develop plans to **integrate storage facilities** that served separate water districts before consolidation in the Water/Wastewater Facilities Master Plan, see Strategy 1 (in progress)
- D) Purchase capacity in **Santa Margarita Water District's** proposed 500 million gallon regional water storage facility (in discussion for purchase of 60 million gallon capacity; storage facility projected for construction by 2010).

## STRATEGY 6

Identify customer requirements (wants and needs) regarding District services, rates, initiatives, and public information and implement changes as appropriate.

### Action Plans

*Lead: Administration Department (Public Information and Customer Service with Finance and other departments)*

- A) Determine approach, timing and topics of customer and public research/surveys (not started).
  - 1) General perception of the District (value, services, service levels, public information, community outreach)
  - 2) Awareness, understanding and acceptance of District initiatives, rate structure, San Juan Creek property development, consolidated Operations Facility, and financing for long-term capital improvements.
- B) Conduct research, assess findings and implement changes as appropriate (not started)

*Action Plans completed since Nov. 2003:*

*Focus groups and workshops with food service establishments to develop the Grease Control Program.*

*Customer survey cards (completed and ongoing)*

*Limited number of ad hoc community advisory committees or groups focused on specific topics, e.g., force main break, San Juan Creek property development, Laguna Sur pipeline repair.*

## STRATEGY 7

Attract, train and retain a skilled workforce.

### Action Plans

*Lead: Administration Department (HR with other departments)*

#### **A) Ensure competitive compensation and benefits.**

- 1) Address compensation and cost of living issues for personnel required to live within 30 minutes or 15 miles of the District for stand by duty/emergency response. (Building duty housing, complete in 07/08)
- 2) Assess employee compensation and benefits to ensure they are competitive with other district's (annual and ongoing)

#### **B) Enhance employee training and development.**

- 1) Review, update, and revise all **job descriptions** (ongoing).
- 2) Ensure supervisors effectively manage their direct reports through **annual performance reviews**, training and development plans, recognition programs, and safety compliance (ongoing)
- 3) Enhance **employee orientations** with facility tours and visits to field/administrative offices (ongoing).
- 4) **Cross train** personnel in different functional areas to promote workforce flexibility, e.g., within water and sewer operations; within Customer Service and Accounting (ongoing).

#### **C) Provide employee recognition for certification of water and sewer personnel.**

- 1) Support sanitary operations in meeting anticipated state certification requirements. (underway)
- 2) Reward employees for certification through compensation/bonus programs. (underway)

#### **D) Develop **succession plans** for senior level and key mid-level managers to ensure transition of institutional knowledge.**

- 1) Identify people in **critical positions** for succession planning (underway)
  - a) Inventory their areas of expertise, core competencies, skills and certifications and estimated time they may leave/retire (not started)
  - b) Develop approach to backfill and/or replacement.
- 2) Inform employees of the current **chain of command** for emergency and day-to-day operations. (underway)

*Action plans completed since Nov. 2003*

*Ensured water personnel met state-mandated certification (completed one year in advance and ongoing)*

*Successfully transitioned long-time Customer Service Supervisor to internally-promoted supervisor*

*Developed transition plan for the Director of Finance who retires in 2007*

## STRATEGY 8

Develop and manage the San Juan Creek Property and other properties of the District to maximize benefits to customers and the community.

### Action Plans

*Lead: General Manager with Engineering Department and District Counsel*

- A) Maximize value of District's 30-acre **San Juan Creek property** for the benefit of customers and the community. (underway and ongoing)
  - 1) **Coastal Development Zone**
    - a) Utilize real estate advisory firm to present an analysis of land-use options to the Board for the highest and best use of the property; select option (in progress; decision 07/08). Implement.
    - b) Lease currently undeveloped property to maximize revenues (ongoing)
  - 2) **Non-Coastal Development Zone**
    - a) See Operations Facility, Strategy 3
    - b) See Groundwater Recovery Facility, Strategy 16C.
- B) Maximize value of **District's other real property** for the benefit of customers and the community. Assess land-use options for other real properties (in progress)

*Action plans completed since Nov. 2003*

*Raised non-coastal zone above the flood plain.*

*Standardized and increased lease rates, increased tenant count, and increased annual lease income.*

*Secured required permits to construct the access road from Stonehill and built road.*

*Constructed 90% of the Groundwater Recovery Facility by 2007.*

*Sold "Presidio" property in San Clemente.*

## STRATEGY 9

Leverage technology to support the continued provision of excellent customer service.

### Action Plans

- A) Lead Department: Administration (IT)
  - 1) Review **IT Master Plan** and update as needed. (annual review; plan developed in 2003)
  - 2) Upgrade District's **IT infrastructure** according to plan (annual).
  - 3) Update IT **Business Recovery Plan** (08/09)
  - 4) Develop and enhance **employee computer skills** (in progress and ongoing).
  - 5) Implement **Document Imaging & Retrieval System** (pilot in progress, complete 07/08); implement in phases through 2009)
- B) Lead Department: Administration (IT with Customer Service)
  - 1) Provide training to Customer Service on **billing system upgrades** (as needed)
  - 2) Replace current meter reading devices with **automated readers** (system online and crew training, 2006; meter replacement targeted at 500 per year for 5 years in difficult/dangerous areas to access)
  - 3) Implement **online account access** (completed 2006)

- 4) Provide customers with **new bill payment options**
  - a) Implemented automatic bill payment by checking account (2005)
  - b) Implement automatic bill pay by credit card (07/08)
  - c) Implement online bill payment by checking account or credit card (07/08)
  - d) Evaluate telephone and point of service bill payment by credit card (07/08)
  - e) Evaluate level payment plan option for our customers -- as gas and electric utilities offer (07/08).
- C) Lead: Engineering Department with IT support
  - 1) Implement **Geographic Information System** for potable/recycled water and wastewater facilities
    - a) Initial implementation completed and system online for Engineering (05/06)
    - b) Train personnel, install additional application, hire GIS specialist (in progress, complete in 2007).
- D) Lead: Operations Department with IT support
  - 1) Replace and upgrade **Supervisory Control & Data Acquisition** system; evaluate and upgrade communications system (in progress, 07/08).
  - 2) Implement **Computerized Maintenance Management System** (operational and in use 07/08)
- E) Lead: Administration Department (IT with Support Services)
  - 1) Implement new **phone system** (completed 2006); train current employees (completed 06/07)
  - 2) Improve intra-**District communications**, e.g., common system, reliability (07/08)
- F) Lead: Administration Department (Finance with IT support)
  - 1) Replace and upgrade the **financial management system** (in planning; complete 07/08)
- G) Lead Department: Administration (IT with Public Information)
  - 1) Upgrade **District website** with content management functionality (10/11 - See Strategy 18E).

## STRATEGY 10 - NEW

Develop and implement the Emergency Response Plan and Multi-Hazard Mitigation Plan.

### Action Plans

- A) Implement **Emergency Response Plan** (in progress)
  - 1) Implement private mutual aid agreements with contractors and suppliers (9/07)
  - 2) Conduct table-top exercises (9/07)
  - 3) Develop a formal Emergency Operations Center for the District (12/07)
  - 4) Conduct full scale exercise (1/08)
- B) Meet **National Incident Management System** (NIMS) requirements, including mandatory system certification (annual requirement, complete by 9/07)
- C) Update the **Multi-Hazard Mitigation Plan** with Water Emergency Response of OC, as needed.

*Action plans completed since Nov. 2003*

*Developed Emergency Response Plan (completed 2004, updated as needed)*

*Compliant with NIMS regulations (2006)*

*Developed Multi-Hazard Mitigation Plan with WEROC and member agencies*

# DISTRICT STRATEGIES & ACTION PLANS (2007-2012)

## TIER II PRIORITIES -- UNRANKED (17)

### STRATEGY 11

Comply with sanitary sewer collection system regulations, orders, and standards in the interest of public health, safety and the environment.

#### Action Plans

*Lead: Operations Department (with Administration/District Counsel)*

A) **Comply with US EPA Order CWA-402-9-03-29** to document, develop and implement the District's sanitary sewer overflow prevention program.

- 1) **Gravity Sewer Line Plan** (submitted 2005, updated annually and as needed)
  - a) **Cleaning:** System-wide (annually; video as needed); hot spots (at least quarterly; video as needed)
  - b) **Inspection & Condition Assessment:** Baseline video inspection and condition assessment (completed 2002-2004); video inspection and assessment (total system every 5 years); hot spot video (as needed); force main video (annual, where accessible) and force main surface inspection (weekly).
  - c) **Priority Rehabilitation:** Based on baseline video inspection and assessment (Priority 1, 2 & 3 repairs completed 2003-2006)
  - d) **Eliminate hot spots** (completed 2003-2006, except for <100 recurring; ongoing)
  - e) Identify lines requiring near/long term rehabilitation (completed and ongoing); develop plan for 10-year capital improvements (See Strategy 1A, "Water/Wastewater Facilities Master Plan")
- 2) **Root Control Plan** (submitted 2005, updated annually and as needed)
  - a) **District System:** Cleaning and maintenance (annual); video inspection and assessment (total system every 5 years); maintenance, repair and rehabilitation (as needed and according to schedule and severity)
  - b) **Private Sewer Laterals**
    - (i) Customer notification program for 1,000 homeowners who have heavy-to-medium roots from their private lines into the public system (in progress, complete in 07/08)
    - (ii) Consider use of smaller cameras to video roots growing in private laterals and homeowner incentive program (07/08); public information "FROG" program (ongoing)

- (iii) Contract to clean private sewer lines (agreements with the County (Dana Point Harbor), State Parks (Doheny Beach) and homeowners' associations with private sewer systems)
  - (iv) Develop overall approach for homeowners' associations, e.g., request maintenance schedules, consider ordinance, contract for cleaning (not started)
  - (v) Review District's opportunity to maintain private sewer laterals between the point of connection to the main and the private property boundary
- 3) **Fats, Oils and Grease Control Plan** (completed 2006, updated annually and as needed)
  - a) **District System:** Cleaning and maintenance (annual; video as needed); video inspection and assessment (20% of total lines per year); repair and rehabilitation (as needed and according to schedule and severity); hot spots (at least quarterly; video as needed); public information "FROG" program (ongoing)
  - b) **Food Service Establishments**
    - (i) Developed Grease Control Ordinance 201, requiring FSEs to secure Waste Discharge Permit and comply with kitchen best management practices (in effect 2006; 70% or required permits in 06/07)
    - (ii) FSE employee training program, third-party inspection program, grease interceptor rebate program with City of Dana Point (2006 and ongoing)
    - (iii) Drain Is Not A Dump public information programs (ongoing)
- 4) **Lift Station and Force Main Plan**
  - a) Conduct study (completed 2004); develop rehabilitation and upgrade plan to existing facilities (completed 2005)
  - b) Assess **redundant force mains** (See Strategy 1A, "Water/Wastewater Facilities Master Plan.")
- 5) **Annual progress reports and quarterly spill summaries** until Compliance Order terminates (report submissions began March 2004; annual reports cycle in September).
- B) **Secure release from EPA Compliance Order** (request submitted in 2006; pending)
- C) **Comply with San Diego Regional Water Quality Control Board Order No. R9-2006-0121:** Spill Report Requirement for publicly-owned sanitary sewer collection systems. Private sewer spill reporting is now mandatory – once they become known to an agency. (Effective Feb. 2007; in compliance)
- D) **Comply with State Water Resources Control Board General Waste Discharge Requirements (WDR) which replaces Regional Order No. 96-04.** Sanitary sewer overflow prevention and response requirements for publicly-owned sanitary sewer collection systems (Effective 2007)
  - 1) Develop Sewer System Management Plan (SSMP), including SSO Prevention and Response Plans.
  - 2) Report public system spills that are 1,000 gallons or greater.
  - 3) Submit required post-spill incident reports via new online reporting system developed by the State Water Board; train personnel in use of the online system.

## STRATEGY 12

Comply with water quality regulations, orders, and standards in the interests of public health, safety and the environment.

### Action Plans

*Lead: Operations Department*

- A) **Comply with US EPA Stage 2 Disinfectants and Disinfection By-Products Rule (DBPR)**
  - 1) Conduct Initial Distribution System Evaluation (IDSE) for compliance monitoring to identify locations with high concentrations of Trihalomethanes (THMs) and Haloacetic Acids (HAAs) (permit received).
  - 2) Comply with new Maximum Contaminant Level for THMs and HAAs, effective Jan. 2006 (ongoing)
- B) **Comply with US EPA & California Department of Health Services Maximum Contaminant Levels** for finished water produced at the Groundwater Recovery Facility (permit to operate)
- C) **Comply with US EPA requirement to publish annual Consumer Confidence Report**, which will include local groundwater results for 2007 in the 2008 Report.
- D) Install **Reservoir Management System** at potable reservoirs to maintain water quality and optimize use of reservoir capacity (in progress)

## STRATEGY 13

Establish long term plans to ensure adequate and diversified supply of water.

### Action Items

*Lead: General Manager (with Engineering, Operations and Administration Departments, depending on action plan)*

#### **General**

- A) Participate in **regional water planning and studies**, e.g., South Orange County Water Reliability Study, Integrated Water Resources Planning (ongoing)
- B) Complete 20-year **Urban Water Management Plan** required by the California Department of Water Resources addressing District's current resource management, future planning and conservation efforts (completed Dec. 2005; updated every five years)

#### **Potable Water**

- A) Construct **Groundwater Recovery Facility** on the District's San Juan Creek Property to provide 260 million gallons a year of potable water from the San Juan Basin and to provide an emergency water supply (operational 2Q 2007; opening May 2007; exercise rights to increased extraction (in progress)
- B) Explore potential for the District to **bottle groundwater** for emergencies, community-based uses and/or sale (10/11). Cost of plant analysis (08/09)

- C) Set aside by agreement 5 acres of the San Juan Creek Property as a potential site for MWDOC's **proposed, future regional ocean desalination plant** that could produce 15 million gallons a day of potable water for south Orange County. (Phase 1 feasibility testing completed 2005; Phase 2 feasibility testing completed 2006; discussion with potential participants in progress)

### Recycled Water

- A) **Renew** accounts (ongoing)
- B) Expansion of recycled water service **in our service area**
- C) Consider expansion of recycled water sales to **adjacent agencies and cities**
- D) **Regain** Aliso Creek Golf Course as a customer (pending, TDS and funding issues)
- E) Seek federal/state **funding** for projects (ongoing)
- F) In the **Water/Wastewater Facilities Master Plan Study** (Strategy 1A), assess:
  - 1) Expanded sales of recycled water in our service area (such as Three Arch Bay and Monarch Bay)
  - 2) The possibility of increasing sales to adjacent agencies and cities.
  - 3) The feasibility/ benefit of **purchasing capacity** in the planned Advanced Wastewater Treatment Plant at the J.B. Latham Wastewater Treatment Plant, which could provide 500,000 gallons a day of recycled water (in progress).

### **STRATEGY 14**

Promote water conservation in compliance with voluntary California Urban Water Conservation Council Best Management Practices (underway and ongoing).

*Lead: Operations Department (with Public Information support)*

#### Action Plans

- A) Seek opportunities to collaborate with cities, homeowners' associations, non-governmental organizations, and community stakeholders to prevent landscape over-watering. (Note: Landscape irrigation is the #1 use of drinking water in our service area and #1 cause of urban runoff)
- B) Promote Metropolitan Water District of Southern California and Municipal Water District of Orange County water conservation rebate programs locally: residential, commercial, homeowners' associations
- C) Implement District conservation programs, such as free landscape irrigation assessments and visits to residences and businesses for conservation and compliance outreach.

## STRATEGY 15

Communicate key information to customers and the public.

*Lead: Administration Department (Public Information)*

### Action Plans

- A) Continue communications on water conservation and SSO prevention (ongoing)
- B) Focus specialized communications efforts in support of key events and initiatives (ongoing)
  - 1) Groundwater Recovery Facility opening (2Q 2007)
  - 2) San Juan Creek Property development (ongoing)
  - 3) Ownership and operation of private sewer laterals and private sewer systems (ongoing)
  - 4) Potential bond financing
  - 5) Potential rate changes
- C) Improve delivery of communications to customers to ensure that the total customer base receives pertinent communications, e.g., homeowners' association residents and renters who do not get a water bill but are our customers (not started)
- D) Optimize mix of communications and outreach: customer bill inserts, District website, media coverage, community events, school assemblies, scholarship program, public presentations and public forums, brochures and flyers (ongoing)
- E) Improve and upgrade the District's website to ensure the provision of timely, relevant information in an interesting and user-friendly format (ongoing & see Strategy 9G)
- F) Provide the Board and the executive team with communications workshops in specialized areas, such as better communicating with the public, use of the District's website, dealing with the media, and tips for potential televised board meetings.

### Action plans completed since Nov. 2003

*Implemented specialized communications programs: Strategic plan (2003); Rate restructure (2004); Grease control program for food establishments (2005); Sewer tunnel rehabilitation (completed and ongoing)  
Upgraded the SCWD website: Board meetings schedule, agendas, reports and minutes; job postings  
Provided e-mail of Board meeting agendas to customers and the public, upon request.*

## STRATEGY 16

Maximize opportunity for the public to participate in Board meetings by periodically evaluating location, time, and potential broadcast. (ongoing)

*Lead: General Manager and Board President*

### Action Plans

- A) Broadcast meetings from our website and provide replay capability 24/7.
- B) Move Board meetings to the City of Dana Point.

## STRATEGY 17

Provide dry weather diversions, treatment plant operations, and beneficial reuse of urban runoff under contract to cities and the county, as feasible.

### Action Plans

*Lead: General Manager with Operations Department*

### Diversions

- A) Assess **new diversion requests** for feasibility (case-by-case). Potential: Lagunita, Three Arch Bay; Monarch Beach.
- B) Prepare plan to **inspect diversion structure** operations (in progress)

### Treatment Plant Operations

- A) Operate the **Salt Creek** Ozone Treatment Facility under contract to the City of Dana Point (ongoing)
- B) Operate the **Poche Creek** UV Treatment Facility for the City of San Clemente (in planning, estimated completion Summer 2008)
- C) **Close operations** when requested by customers

### Beneficial Reuse

- A) Assess options for using ozone-treated water at **Salt Creek** for irrigation as appropriate (not started)
- B) Consider proposals to capture runoff from **Aliso Creek** for the recycled water system (in progress)

## STRATEGY 18

Participate as a stakeholder in watershed initiatives to ensure the maintenance and protection of the District's water and sewer system.

### Action Plans

*Lead: General Manager with Operations and Administration Departments*

- A) **Aliso Creek** in South Laguna (City of Laguna Beach, County, e.g., SUPER project, potential beneficial reuse, prop 50 grant).
- B) **Salt Creek** in Monarch Beach (City of Dana Point, County, e.g., potential beneficial reuse)
- C) **San Juan Creek** in Capistrano Beach (City of Dana Point, County)

## STRATEGY 19

Assess vulnerability and security of facilities to human threat and natural disaster, develop plans and implement.

### Action Plans

*Lead: Operations Department*

- A) **Implement** Vulnerability Assessment recommendations and incorporate technology into solutions as appropriate, such as automated surveillance of facilities. (underway)
- B) **Update** the EPA-mandated Vulnerability Assessment (2009)

*Action Plans completed since Nov. 2003*

*Completed EPA-mandated Vulnerability Assessment for SCWD (June 30, 2004)*

## STRATEGY 20

Operate the Joint Regional Water Supply System under contract, which brings imported water to south Orange County from Metropolitan.

### Action Plans

*Lead: Operations Department*

- A) Update EPA-mandated **Vulnerability Assessment** (2009)
- B) Provide **leadership role** in bringing the nine member agencies to consensus on key issues and decisions; conduct quarterly meetings of the JRWSS Advisory Committee (ongoing)
- C) Review **easement locations** for the Joint Transmission Main to identify potential encroachments (08/09)

*Action plans complete/dropped since Nov. 2003*

*Conducted EPA-mandated Vulnerability Assessment and submitted report to the EPA (June 30, 2004)*

## STRATEGY 21-NEW

Explore partnership opportunities with regional agencies and local government.

### Action Plans

*Lead: General Manager*

- A) Ensure adequate water/sewer infrastructure at **Dana Point Harbor** as part of the County's Harbor Revitalization (ongoing)
- B) Discuss water/sewer system compatibility with the **City of San Juan Capistrano** (underway)

## STRATEGY 22

Foster excellent relations with regional, regulatory and governmental agencies. (ongoing)

### Action Plans

*Lead: General Manager and Board President (with Administration, Operations & Engineering)*

- A) **Comply** with regulatory orders and requirements (see Strategies 12 & 13)
- B) Maintain **contacts and communication** with such agencies as the US EPA, the San Diego Regional Water Quality Control Board, the State Water Resources Control Board, the Local Agency Formation Commission, and the Orange County Health Care Agency.
- C) Regularly attend the monthly Board **meetings** of the San Diego Regional Water Quality Control Board.
- D) Enhance **contacts and communication** with such agencies as the Department of Fish and Game, the Coastal Commission, and the Orange County Public Facility & Resource Department.
- E) Regularly attend the City of Dana Point **council meetings** and attend City of Laguna Beach council meetings as needed.
- F) Conduct meetings of the South Laguna **Water/Sewer Advisory Commission**, attend meetings of the Dana Point Water/Sewer Committee and participate in the Dana Point Water Quality Subcommittee

## STRATEGY 23

Foster excellent relations with non-governmental organizations (NGOs), civic organizations and community groups.

### Action Plans

*Lead: General Manager and Board President (with Administration, Operations & Engineering)*

- A) Continue dialog and solicit input from community groups, such as the South Laguna and Dana Point Civic Associations.
- B) Continue dialog and solicit input from environmental groups such as the Coastkeepers and Surfriders.

## STRATEGY 24

Enhance employee communications.

### Action Plans

*Lead: Administration Department (Human Resources, IT, Public Information & other groups)*

- A) Improve voice/data communications within and between satellite locations and headquarters (ongoing)

- B) Continue to utilize the quarterly Employee Representative Meetings as springboard for information sharing and dissemination. (underway and ongoing)
- C) Share organization information regularly through communications vehicles, e.g., employee publications, interdepartmental presentations, regular general employee meetings. (underway)

### STRATEGY 25

Optimize the District's structure, processes and performance.

#### Action Plans

*Lead: Administration Department (with Operations & Engineering)*

- A) Develop key performance indicators to drive accountability in critical areas of the business, such as customer satisfaction, operating efficiency, employee satisfaction, and financial performance; share with the Board quarterly (not started; known as, "dashboard")

*Action plans completed since Nov. 2003*

*Created a single Director of Operations position for water/wastewater personnel.*

*Reduced turnaround time to answer queries/generate reports (completed and ongoing)*

*Streamlined selected work processes in Administration, Operations, Engineering (completed and ongoing).*

### STRATEGY 26-NEW

Manage the Dana Hills Tennis Center at the District's reservoir for the benefit of customers and the public.

#### Action Plans

*Lead: General Manager with Dana Hills Tennis Center Manager*

- A) Achieve and maintain revenue neutrality (in progress)
- B) Manage the capital program to ensure maintenance of quality community recreation facility (ongoing).
- C) Conduct succession planning for the tennis center manager (underway)

### STRATEGY 27

Develop and implement strategic plan.

#### Action Plans

*Lead: Administration Department (Public Information/Strategic Planning)*

- A) Review strategic plan annually and update as needed (in progress)
- B) Conduct full strategic planning process every five years (original plan 03/04, new plan 08/09)