



MARIN WATER PROPOSED 2024 FIVE-YEAR STRATEGIC PLAN

JANUARY 23, 2024

PURPOSE AND DISCUSSION

PURPOSE:

Review draft strategic plan:

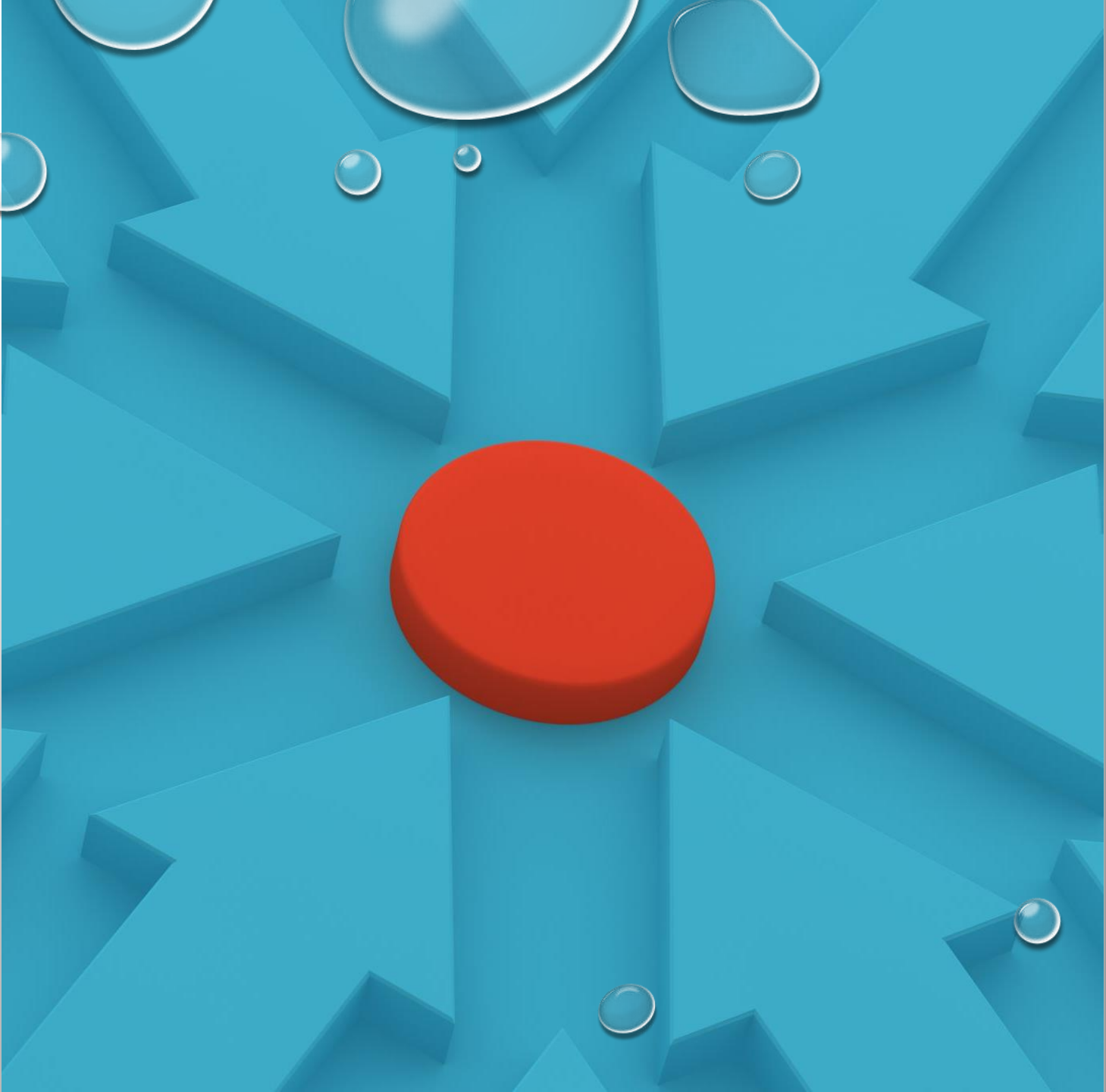
- Updated mission, vision, and values
- Refined goals and objectives
- Progress reporting approach

DISCUSSION:

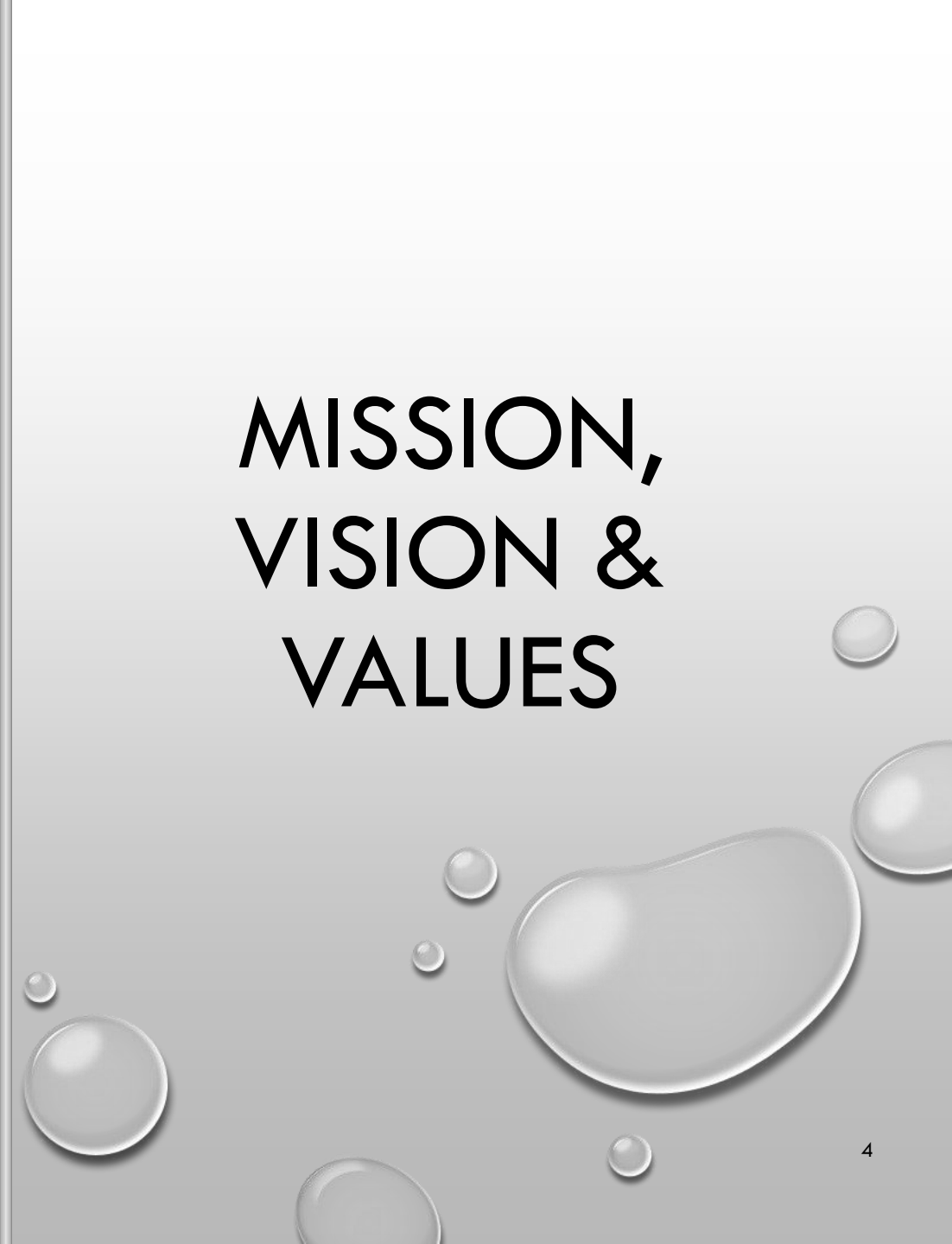
- Are there any final revisions to the strategic plan?

STRATEGIC PLANNING FRAMEWORK





MISSION, VISION & VALUES





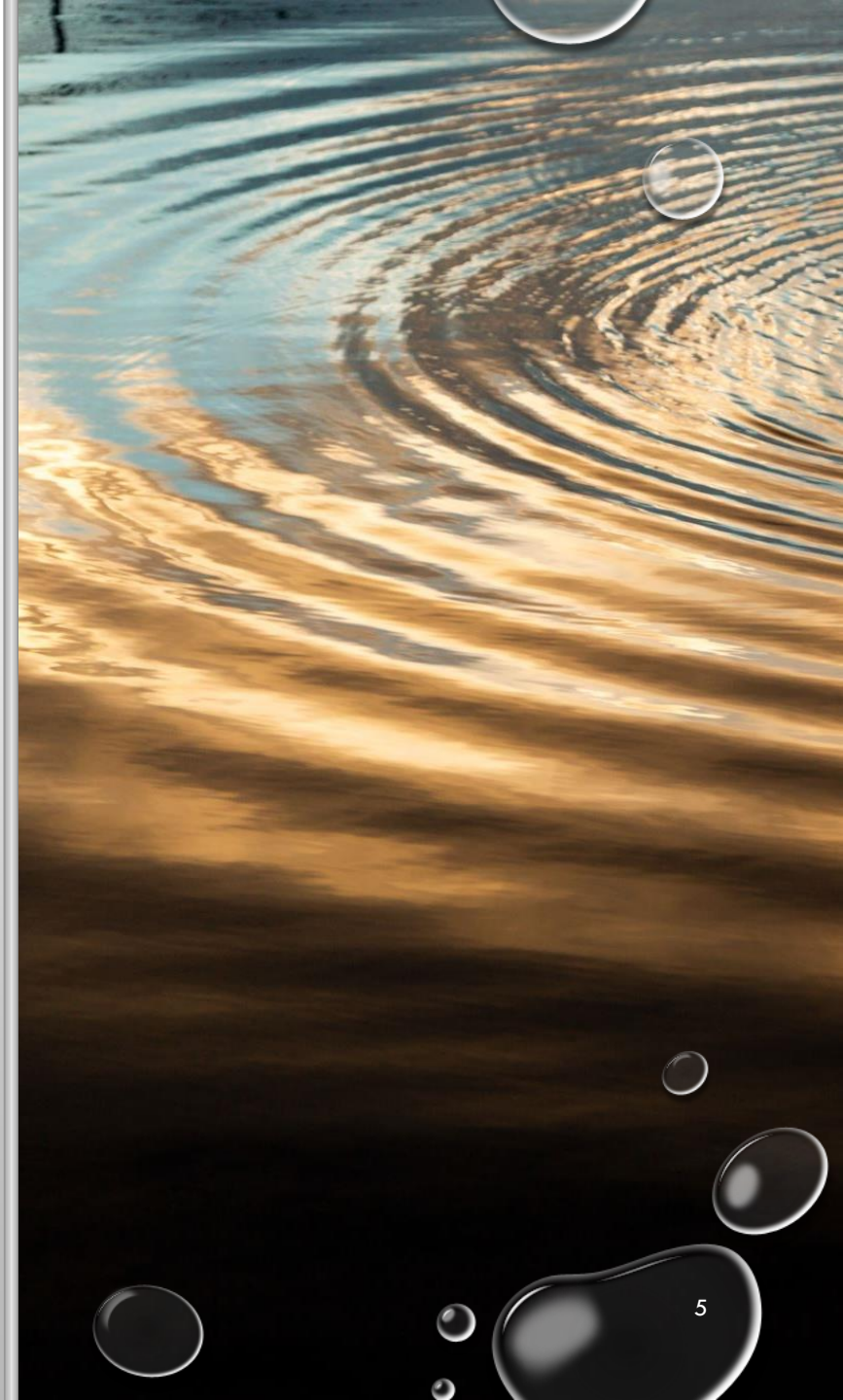
MISSION & VISION

Our Mission:

Marin Water manages the lands, water, and facilities in our trust to provide reliable, high-quality water and adapt and sustain these precious resources for the future.

Our Vision:

Marin Water is a leader in water and natural resource management and addressing the complexities of a changing environment.



VALUES

Marin Water is dedicated to serving customers and the community by upholding these core values:

- **WE PRIORITIZE HEALTH AND SAFETY.**
We are committed to the health and safety of our colleagues and community.
- **WE ARE STEWARDS.**
We recognize the essential connection between people and natural resources and manage our lands and facilities for sustained benefits now and in the future.
- **WE ARE INNOVATIVE.**
We strive for excellence and innovation in managing water and watersheds.
- **WE ARE EFFICIENT AND RESPONSIVE.**
We value efficiency, cost-effectiveness, and timely service in our work with customers and communities.
- **WE ARE ACCOUNTABLE.**
We operate with the highest levels of individual and organizational accountability to each other and the community.
- **WE ARE RESPECTFUL.**
We maintain a welcoming environment that embraces differences and offers respect, dignity, and fairness for all people and partners.
- **WE LISTEN AND LEARN.**
We enhance ourselves and the organization by listening to others, reflecting on our performance, sharing knowledge with others, and making informed decisions.
- **WE WORK AS ONE.**
We work together to anticipate the challenges ahead and achieve our mission.





GOALS & OBJECTIVES

STRATEGIC PLAN GOALS & OBJECTIVES

GOAL 1: RELIABLE WATER SUPPLY – PAUL SELLIER

GOAL 2: RESILIENT WATER SYSTEM – ALEX ANAYA

GOAL 3: WATERSHED STEWARDSHIP – SHAUN HORNE

GOAL 4: FISCAL RESPONSIBILITY – BRET UPPENDAHL

GOAL 5: ORGANIZATIONAL EXCELLENCE – ADRIANE MERTENS

Goal 1: Reliable Water Supply

Provide a high quality, reliable and resilient water supply now and for the future.



Goal 1 Overview

Marin Water is responsible for ensuring clean potable water is delivered to customers whenever they may need it.

In 2021, the District was faced with the real possibility that with continued drought conditions the water supply would be exhausted within months.

This goal captures the District's commitment to customers to manage the existing high-quality water supply our customers rely on today and to develop additional water resources to provide a reliable and resilient water supply capable of providing water through future droughts.



Goal 1 Five-Year Objectives

Objective 1 - **Reduce Potable Water Use**

Objective 2 - **Augment Existing Water Supply**

Objective 3 - **Preserve and Enhance Existing Partnerships**

Objective 4 - **Provide High-Quality Water to Customers**

Objective 1 – Reduce Potable Water Use

The District will reduce water use and water waste by 800 AF in the next five years to conserve our resources and ensure that the District meets or exceeds the statewide indoor residential per capita water use target of 47 gallons per capita (R-GPCD) by 2025 and is on track to meet water use objectives established for the District by 2030.



Objective 1 – Reduce Potable Water Use

- Identify and implement water efficiency concepts and strategies, including those concepts and strategies that target high water users, in the Water Efficiency Master Plan to achieve short-term and long-term goals.
- Enhance incentives, education, and outreach to our customers that effectively reduce water use.
- Implement the recommendations from District’s water loss control and leak detection program update, using the most current industry practices and leveraging innovative technologies.
- Participate in and support the development of regulations and legislation that drive water efficiency through participation in industry associations.
- Enhance incentives, education, and outreach to our customers that effectively reduce water use.
- Review a range of policy options to further advance water efficiency.

Objective 2 – Augment Existing Water Supply

The District will fully implement the Strategic Water Supply Roadmap short-term actions and make progress on long-term, cost-effective projects to meet demand during a four-year drought with no more than 25 percent mandatory conservation (Water Shortage Contingency Plan Stage 3).



Objective 2 – Augment Existing Water Supply

- Fully Implement the Strategic Water Supply Roadmap short-term actions to augment the water supply by increasing resilience by up to 2,700 acre feet (AF):
 - Complete electrification of Soulajule Pump Station - 420 AFY.
 - Complete Phoenix to Bon Tempe pumping - 260 AFY.
 - Complete optimization of Sonoma water supply - 2,000 AFY.
 - Complete stream release automation.

Objective 2 (contin.) – Augment Existing Water Supply

- Implement the Strategic Water Supply Roadmap medium-term projects to obtain up to 5,000 AFY of additional water supply and provide an update for achieving the Roadmap longer-term goal of 12,000 AFY to 20,000 AFY water supply:
 - Complete feasibility report for brackish desalination and begin next steps.
 - Monitor technological advances in desalination processes and track the development of projects to understand costs and alternate project approaches.
 - Continue to seek funding to offset the cost of recycled water projects and monitor progress on potable reuse projects and technology.
 - Select preferred Marin-Sonoma Regional Water Conveyance project alternative and begin next steps.
 - Select preferred Local Storage Improvement project alternative and begin next steps.
 - Provide ongoing progress updates on Roadmap projects.

Objective 3 – Preserve and Enhance Existing Partnerships

The District will strive to ensure continued access to supplemental water from Sonoma Water, which can account for approximately 25% of annual potable water demand.

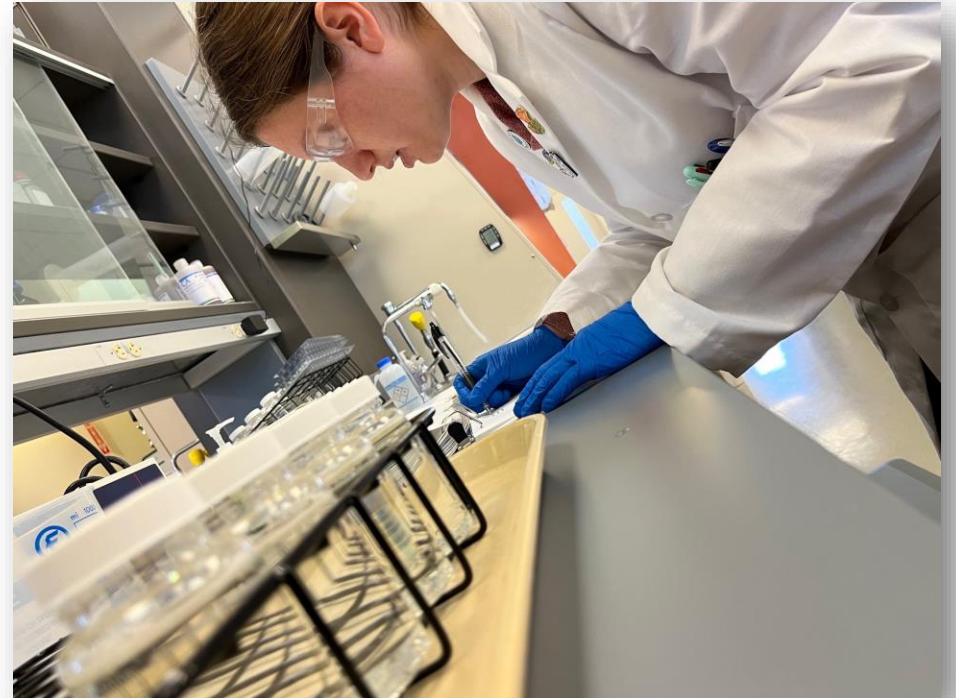


Objective 3 – Preserve and Enhance Partnerships

- Renew agreement with Sonoma Water to ensure continued access to supplemental water supply.
- Enhance relationships with Sonoma Water and the other cities and agencies that depend on Sonoma Water for water supply to develop and support regional water supply projects.
- Seek support from State and Federal agencies for the development of Regional Water Supplies.

Objective 4 – Provide High-Quality Water to Customers

The District will cost-effectively manage our water system to ensure water quality is protected from the source to our customers.



Objective 4 – Provide High-Quality Water to Customers

- Develop Reservoir Management Plans for Alpine, Bon Tempe, Kent, Nicasio, and Soulajule that include water quality objectives and algae management strategies.
- Develop improvements to water treatment options for removal of taste and odors in drinking water and other improvements to water quality.
- Ensure that the Water Quality lab is accredited to the latest TNI accreditation standard for compliance analyses.
- Develop and apply lessons learned from other agencies regarding impacts to water quality from wildfires.
- Participate in the development of regulations that are appropriately protective of public health and the environment through participation with industry groups and associations.

Goal 2: Resilient Water System

Invest in and maintain a resilient water system through effective infrastructure management planning.



Goal 2 Overview

The District's water system spans challenging topography and consists of pipeline, tanks, pump stations, reservoirs, dams, and treatment plants that work together 24/7 to capture, transport, store, and deliver water to 191,000+ customers.

Maintaining and modernizing this infrastructure is core to ensuring system resilience through day-to-day demand and during drought, and natural and manmade disasters.

The four-year rate increase approved in 2023 supports the District's ability to renew and replace system infrastructure, and an adaptive management approach to identifying and prioritizing projects will be essential to guiding our system investments.

Instilling the latest best practice training and emergency response and recovery methods into team procedures will also ensure the District's workforce is prepared to safeguard the community's water supply under the most challenging of conditions.

Objective 1 – Infrastructure Condition Assessment

The District will strengthen its infrastructure risk assessment process to prioritize investments in the replacement, rehabilitation, and/or repair of its infrastructure.



Objective 1 – Infrastructure Condition Assessment

- Complete above ground facility condition assessment.
 - Pump station assessment: 30 pump stations have been completed, 67 remain.
 - Tank assessments: 99 tanks have been evaluated to date and 31 remain.
- Review for greater robustness and transparency the ongoing prioritization process of pipeline replacement jobs through criteria, including assessment of age, leak history, probability and consequence of failure, and material type.
- Perform condition assessments for large infrastructure such as dams or treatment plants.
- Complete Facilities Master Plan assessing workplace infrastructure including administration building, corporation yard, and watershed facilities to identify the needs to be incorporated into the capital planning effort.

Objective 1 (contin.) – Infrastructure Condition Assessment

- Identify above-ground infrastructure hardening needs that provide a greater level of protection against wildfire and incorporate them into the capital planning and prioritization efforts.
- Identify single points of failure throughout the water system and incorporate them into the capital planning and prioritization efforts.
- Review industry standard security measures across the water system and identify needs for improvement and incorporate them into the capital planning and prioritization efforts.
- Complete the Water System Master Plan and utilize the information to identify opportunities to simplify the system by reducing the number of tanks and pump stations.

Objective 2 – Capital Planning

The District will collaborate with the Capital Steering Committee to identify infrastructure projects evaluated through the condition assessment process and establish an associated timeline to implement the projects based on the projected capital budget.

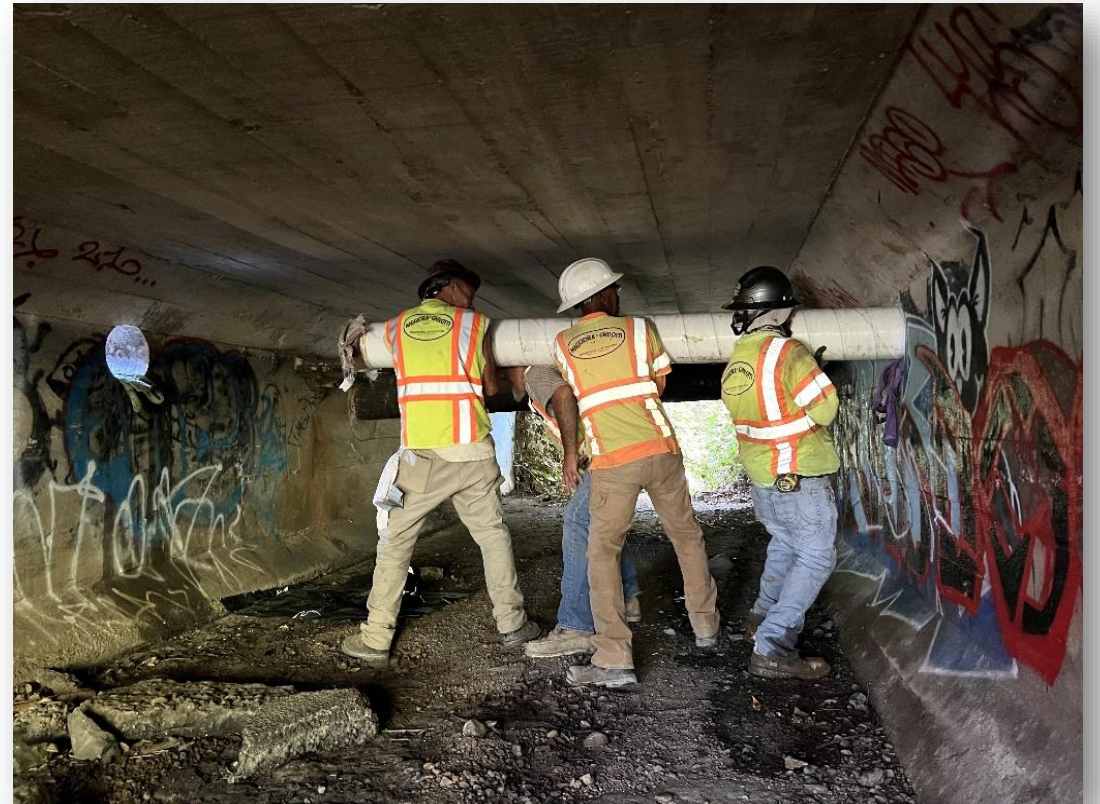


Objective 2 – Capital Planning

- Incorporate data from “Objective 1 – Infrastructure Condition Assessment”, along with other District planning efforts into District-wide capital planning to develop infrastructure investment scenarios for 10- and 30-year horizons.
- Continue to identify grant opportunities to offset costs borne by ratepayers.
- Evaluate bond funding opportunities for large capital projects that provide generational value.

Objective 3 – Capital Project Delivery

The District will incorporate innovative processes and staffing solutions into its execution of future infrastructure projects to maximize the use of staff time, reduce costs, and streamline implementation of an increased capital project workload.



Objective 3 – Capital Project Delivery

- Assess resource needs to meet the increased capital improvement program, including leveraging District staff with support from external engineering consultant firms.
- Establish on-call contract(s) to provide expedited repairs on projects too large for District crews but too small for standard design, bid, and build workflows.
- Execute on-call contracts with engineering firms to streamline consulting work without having to execute multiple contracts for the same type of work, i.e., geotechnical and electrical engineering.

Objective 3 (contin.) – Capital Project Delivery

- Review and update necessary sections of the District's contract specifications to the most current industry standards.
- Explore the opportunity for innovative approaches to project implementation, including design-build options for larger capital projects.
- Continue working with local municipalities to achieve a more cost effective approach to paving restoration requirements.

Objective 4 – Operations and Maintenance

The District will evaluate its operations and maintenance program to ensure that staff has the knowledge and skill sets to efficiently operate and maintain our system.



Objective 4 – Operations and Maintenance

- In recognition of a significant staff turnover in Operations, develop a focused training plan for the Division to ensure effective operation and maintenance of our system.
- Establish standard operating procedures to support training and provide for transfer of institutional knowledge.
- Encourage staff involvement in industry associations to provide learning opportunities.
- Review the organizational structure of Operations, including classifications, to ensure the most effective utilization of District resources.
- Identify opportunities to implement technological advancements in equipment and practices to improve efficiencies.

Objective 5 – Energy Planning

The District will seek opportunities to reduce its carbon footprint and energy costs through infrastructure projects and planning.



Objective 5 – Energy Planning

- Meet new fleet vehicle regulatory changes including the expansion of the District's fleet to electric vehicles and needed EV charging stations.
- Evaluate pump station rehabilitation projects to determine the feasibility of supplementing prime power with alternative energy and compare it with system efficiency upgrades to determine life-cycle cost savings.
- Engage in discussion with the Board on carbon neutrality to establish appropriate goals, policies, and direction.
- Review and evaluate the application of micro-turbine technology where applicable as an energy recovery and cost-saving option.
- Evaluate renewable power opportunities throughout the District.

Objective 6 – Emergency Response Readiness

The District will plan and prepare for emergencies to ensure it can maintain critical operations through fire, floods, earthquakes, and other catastrophic events and effectively manage the disaster recovery process.



Objective 6 – Emergency Response Readiness

- Update the District’s emergency response plan to reflect current needs, priorities, and threats.
- Conduct a minimum of two annual tabletop exercise involving the District’s Emergency Operations Center (EOC) to ensure emergency readiness.
- Conduct yearly reviews of the District’s dam Emergency Action Plans (EAP) for each of the seven dams and coordinate tabletop exercises with the Marin County Office of Emergency Services and other stakeholders every five years to ensure District and local first responders are familiar with the dam EAPs.

Objective 6 (contin.) – Emergency Response Readiness

- Participate in emergency preparedness trainings in coordination with Marin County Office of Emergency Services on countywide emergency response scenarios.
- Establish FEMA-compliant contracts for engineering and construction services that are ready to be executed following an emergency.
- Continue to assess and identify opportunities to reduce risk throughout the District.

Goal 3: Watershed Stewardship

Protect and manage Marin Water lands for the long-term benefit of the community and the environment.



Goal 3 Overview

Marin Water's 19,800 acres of watershed lands provide 75% of the District's water supply and support the region's rich biodiversity.

This Watershed Stewardship Goal encapsulates our dedication to multifaceted initiatives that span environmental stewardship, wildfire resiliency, watershed restoration, the enhancement of watershed facilities, and the support for education and recreation, which connects the community to their watershed lands.

Goal 3 Five-Year Objectives

Objective 1 - **Creek Restoration**

Objective 2 - **Watershed Resiliency to Wildfire**

Objective 3 - **Stewardship**

Objective 4 - **Recreation**

Objective 5 - **Facilities**



Objective 1 – Creek Restoration

The District will strive to protect and restore watershed lands and improve upland habitat and streams to establish a resilient landscape that can help buffer against climate-induced risks. Through active restoration and monitoring the District will help the community steward the unique biological resources of the Mt. Tamalpais Watershed and Lagunitas Creek.



Objective 1 – Creek Restoration

- Implement 13 restoration sites as part of the Lagunitas Creek Watershed Enhancement Plan in collaboration with State Parks, funding partners, and resource agencies to enhance critical habitat and geomorphic processes that are needed to sustain threatened and endangered species.
- In alignment with the Lagunitas Creek Stewardship Plan (LCSP), complete annual fisheries lifecycle monitoring and habitat enhancement effectiveness monitoring and coordinate with the Lagunitas Technical Advisory Committee and regional monitoring efforts to update the LCSP.
- Integrate new monitoring technology by expanding a network of Passive Integrated Transponders Antennas to improve fisheries monitoring data.
- Provide technical expertise to support regional restoration planning efforts for Walker Creek and other watersheds within District boundaries; participate in technical conferences, regional working groups, and collaborative research efforts to share restoration methods and fisheries monitoring data.

Objective 2 – Watershed Resiliency to Wildfire

The District will continue implementing multi-benefit restoration treatments to maintain a resilient watershed by scaling up the Biodiversity, Fire, and Fuels Integrated Plan (BFFIP) and One Tam Forest Health Strategy. Through proactive management and collaboration with regional partners, the District will advance landscape-scale stewardship efforts on watershed lands that will help safeguard our communities, ecosystems, and water resources for a resilient and sustainable future.



Objective 2 – Watershed Resiliency to Wildfire

- Maintain effective partnerships between watershed rangers and local, regional, and state emergency response agencies to ensure strong interagency collaboration that supports emergency response and mitigation strategies.
- Sustain organizational capacity to increase the pace and scale of the BFFIP and enhance forest restoration, protect water infrastructure, manage invasive plants, and achieve wildfire risk reduction.
- Advance partnerships for regional resiliency planning and collaboration to secure funding for stewardship activities outlined in the BFFIP and as part of other long-term watershed restoration efforts.
- Advance workforce development through the Ranger Trainee Program and by working in partnership with California Conservation Corps, California Conservation Corps North Bay, AmeriCorps Programs, and other regional natural resources and wildfire training efforts.
- Replace aging wildland firefighting and vegetation management equipment to ensure the District has the operational capabilities for emergency response and watershed forest restoration and fuel reduction.

Objective 3 – Stewardship

The District will foster participation and collaboration with the community, creating a strong connection between the public and the Mt. Tamalpais Watershed. The District will advance stewardship and climate adaptation strategies through technical studies and regional partnerships. By participating in the District's volunteer program, community members can contribute to preserving our water supply, protecting biodiversity, and caring for our shared natural resources.



Objective 3 – Stewardship

- Sustain annual biological monitoring to inform scientific knowledge of the watershed and to support environmental compliance for District operations and long-term planning.
- Engage and contribute technical expertise as part of regional research and stewardship efforts through One Tam, TOGETHER Bay Area, the Golden Gate Biosphere Network, the Federated Indians of Graton Rancheria, and regional research efforts.
- Evaluate opportunities for integrating regional restoration and stewardship plan priorities into watershed restoration efforts.
- Lead habitat restoration, trail maintenance, environmental education, and community science projects and programs that provide opportunities for the community to engage in stewardship, improve the health of the watershed, and make a positive impact on the environment.
- Advance natural resources interpretation offerings to advance community education and awareness of the watershed's unique biodiversity and water resources.

Objective 4 – Recreation

The District will maintain a welcoming and enriching environment to support visitors engaging in nature-based recreational activities. Watershed visitation will be balanced with water quality protection and connecting visitors to the watershed through recreational opportunities and stewardship initiatives.



Objective 4 – Recreation

- Complete Watershed Recreation Management Planning Feasibility Study to support visitors and protect watershed water resources and biodiversity as an ongoing adaptive management strategy and evaluate the District’s staffing capacity to carry out this strategy.
- Complete the Azalea Hill Trail Restoration Project through enhancement of trail facilities and removal of social trails to restore sensitive habitats.
- Improve watershed trails by replacing aging infrastructure to establish a more sustainable trail system with a focus on multi-benefit efforts such as West Peak Restoration and Cataract Trail.
- Create nature-based self-guided tours and outreach materials to educate the community about the watershed’s biodiversity, water resources, wildfire issues, and climate change.
- Evaluate priority roads and trails to inform adaptive management and guide improvements to recreational facilities, including trails, fire roads, picnic areas, parking lots, restrooms, and habitat restoration opportunities.

Objective 5 – Facilities

The District will ensure that watershed facilities are operational and well-kept, thereby supporting four critical aspects: emergency response readiness, water system operations, visitor access for recreational and educational purposes, and ongoing environmental restoration efforts within the watershed.



Objective 5 – Facilities

- Carry out multi-benefit watershed maintenance projects that preserve the function of watershed facilities while improving the watershed's natural resources and environmental assets.
- Complete an update to the Roads and Trails Management Plan to integrate modern best management practices and support ongoing maintenance of watershed facilities to protect water quality, support a sustainable road and trails network, preserve biodiversity, and provide the community with facilities that support nature-based experiences on the watershed.
- Integrate watershed facilities into the facilities master planning process to guide key updates to Sky Oaks Headquarters and maintenance yards and explore opportunities for environmental education facilities and visitor infrastructure.
- Maintain existing watershed housing and evaluate opportunities for watershed seasonal employee housing to remove barriers for early career professionals looking to work in the natural resources field in Marin County.

Goal 4: Fiscal Responsibility

Judiciously manage customer revenue and other financial resources for operating, maintaining and upgrading the water system today and in preparation for the future.



Goal 4 Overview

As a public agency, all revenues received by Marin Water are reinvested into the water system, and customer water rates are the primary source of Marin Water's revenue, providing 95 percent of the District's funding. With a relatively small and stable ratepayer base, it is especially imperative for the District to prioritize financial stability and cost-effective operations in order to maximize the value of local ratepayer funds.

Goal 4 Five-Year Objectives

Objective 1 - **Financial Stability**

Objective 2 – **Fair, Equitable, and Proportional Rates**

Objective 3 - **Cost-Effective Business Processes**

Objective 4 - **Outside Funding to Reduce Financial Impacts on Ratepayers**

Objective 5 - **Financial Transparency**

Objective 1 – Financial Stability

The District will utilize reserves and invest in infrastructure consistently and predictably to minimize the rate impact on customers when unforeseen events occur.

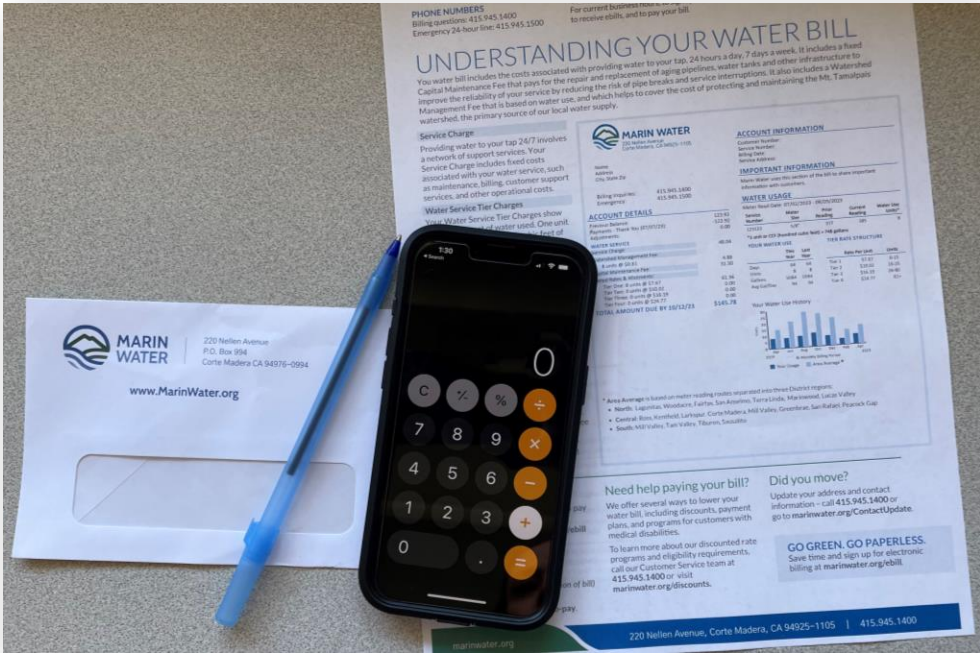


Objective 1 – Financial Stability

- Establish stabilization reserves to mitigate annual revenue fluctuations.
- Support the development of a long-term capital improvement program that ensures an appropriate and stable level of investment.
- Regularly update fees, rents, and other non-rate revenues to maintain pace with inflation.

Objective 2 – Fair, Equitable, and Proportional Rates

Under the legal framework of Proposition 218, the District will continuously evaluate the effectiveness of the rate structure to ensure it produces sufficient revenue while maintaining a balance of affordability and proportionality.



Objective 2 – Fair, Equitable, and Proportional Rates

- Conduct a connection fee study to fully capture the cost of current and future infrastructure needs.
- Evaluate the District’s low-income program and identify strategies to ensure qualified customers are enrolled.
- As part of the 2027 rate-setting process, conduct a cost-of-service study to ensure charges are proportional and reflective of current demand trends.
- Implement a robust outreach plan throughout the 2027 rate-setting process to inform customers about proposed changes.

Objective 3 – Cost-Effective Business Processes

The District will implement operational practices that increase efficiencies to maximize the value of ratepayer revenues.



Objective 3: Cost-effective business processes

- Update the enterprise resource planning system (SAP) to streamline routine processes and provide improved data analytics.
- Evaluate opportunities to leverage external resources that can improve operational efficiencies.
- Minimize the cost of financing by maintaining a very high (AA or better) credit quality rating.
- Increase the use of online bill payments and electronic payments to reduce banking and printing costs.
- Streamline the application process for discount programs and leak adjustments.

Objective 4 – Outside Funding to Reduce Financial Impacts on Ratepayers

The District will seek alternative revenue sources to minimize the impact of future rate increases on customers.



Objective 4 – Outside Funding to Reduce Financial Impact on Ratepayers

- Pursue Water Resources Development Act (WRDA) funding for water storage improvement projects.
- Prudently utilize bond funding to spread infrastructure funding costs over time.
- Develop and secure grants from state and federal agencies to increase the District's capacity to advance key initiatives.
- Obtain Water Infrastructure Finance and Innovation Act (WIFIA) program loans to maximize financial flexibility for projects with longer construction cycles.
- Leverage regional partnerships to increase state and federal funding opportunities.

Objective 5 – Financial Transparency

The District will maintain transparency in all aspects of financial operations.



Objective 5 – Financial Transparency

- Improve online tools for customers to understand their bill.
- Conduct bi-annual reviews of fiscal policies.
- Publish quarterly financial summaries.
- Conduct regular internal and external financial audits.
- Proactively communicate to customers about successful grant applications as well as the District's specific investments in infrastructure projects, water supply roadmap efforts, and watershed restoration milestones to highlight how revenues are being allocated.

Goal 5: Organizational Excellence

Support and sustain an innovative organization that lives by its values, leads by example, delivers valued benefits for its customers, and is regarded as an employer of choice.



Goal 5 Overview

Behind Marin Water's service delivery is a complex water system that requires the organization to perform at its best 24/7, 365. Marin Water's Organizational Excellence goal represents the District's commitment to delivering best-in-class service to our customers through ongoing organizational improvements, cutting edge programs and processes, and continual development of the most important asset of our water system – our workforce.



Goal 5 Five-Year Objectives

Objective 1 – **Organizational Culture and Values**

Objective 2 – **Customer Experience**

Objective 3 - **Industry Engagement, Growth & Leadership**

Objective 4 – **Technology, Innovation, and Process Improvements**

Objective 1 – Organizational Culture and Values

The District will cultivate a positive, meaningful work environment that successfully recruits, retains and develops an engaged, high-performing, mission and values-focused team.



Objective 1 – Organizational Culture and Values

- Strengthen the employment webpage, job portal and recruitment advertisement materials to help attract diverse candidates and better promote the Marin Water team and our accomplishments, brand and culture.
- Continue to grow relationships with community-based organizations and explore new partnerships with local colleges and trade schools to connect local community members, particularly those in underserved communities, with Marin Water career opportunities.
- Redesign and implement a comprehensive and welcoming onboarding process that connects newly hired employees to procedures and District resources that support the employee's success in their role.
- Complete diversity, equity and inclusion training throughout the organization and fold it into the District's onboarding process to help foster a sense of belonging across the workforce.

Objective 1 (contin.) – Organizational Culture and Values

- Develop a broad-based employee training program that provides continued core leadership training for managers and supervisors, implements a needs assessment and training for technical staff and soft skills for all District staff, and establishes internal career track training that supports career advancement.
- Engage staff to evaluate our current recognition and appreciation programs, research employer best practices and refresh the District's employee recognition and appreciation programs.
- Ensure integration of staff input into District decision-making through strengthened two-way internal communication strategies that better engage all staff in the business of the District and provide opportunities for employee feedback.

Objective 1 (contin.) – Organizational Culture and Values

- Increase employee engagement and organizational improvement through periodic employee surveys, with the next one to be distributed in 2024, and implement follow-through initiatives.
- Maintain a culture of workplace safety through a continuous commitment to safety education, training, compliance and communication.
- Assess and evaluate the District's current work facilities to identify needed upgrades and enhancements to support a safe and productive work environment.

Objective 2 – Customer Experience

The District will seek opportunities to enhance the customer experience at every touchpoint.



Objective 2 – Customer Experience

- Perform an accessibility audit of District public facilities, customer programs, and outreach resources to identify and implement modifications that improve access for all customers.
- Deploy internal protocols and tools to strengthen key messaging and visual brand identity to ensure consistency through every customer interaction throughout the organization.
- Establish tools that can be used for expedient geo-targeted communication to customers impacted by service interruptions due to main breaks or other temporary system shutdowns.

Objective 2 (contin.) – Customer Experience

- Use customer survey data, census information, water use reports, and digital analytics to drive decision-making for customer communication strategies and targeted outreach campaign development for conservation programs.
- Broaden customer awareness of our service value and our progress on key priorities and initiatives through creative public relations campaigns, interpretive signage, video, point-of-service displays, new technologies, community events and District volunteer opportunities.
- Host open houses and school field trips at the watershed and treatment plant focused on building enthusiasm and interest for careers in the water industry among youth and explore the development of virtual tour options and teaching curricula that can also interactively bring these facilities into the classroom.

Objective 3 – Industry Engagement, Growth & Leadership

The District will engage with the water industry to seek knowledge and best practices from other professionals and to contribute our own expertise and experiences to the field.



Objective 3 – Industry Engagement, Growth & Leadership

- Ensure that management and staff participate in industry associations to learn, share and bring back best practices and innovations to the District for managing water resources, operations, watersheds, finances, human resources, communications, and other core services.
- Participate in professional development opportunities, including pursuing association committee seats, presenting on conference panels and seminars, submitting cutting edge projects and papers for industry awards, and assembling teams to represent the District at regional and statewide industry operations challenges.
- Continue to build collaboration and communication with other water districts, key government agencies, stewardship networks, and stakeholder organizations.

Objective 4 – Technology, Innovation, and Process Improvements

The District will strengthen efficiencies, business services, and innovation by modernizing essential processes, partnering with others and investing in strategic technology.



Objective 4 – Technology, Innovation, and Process Improvements

- Develop and roll out a modern, secure intranet that will provide effective information exchange and collaboration among departments and teams.
- Provide an employee self-service function for accessing payroll, timekeeping, and other administrative functions.
- Create a program that fosters and incentivizes staff to identify, suggest, and use modern processes and technologies to improve workplace efficiency.
- Partner with academic institutions to research and solve the most pressing challenges for Marin Water and the water industry, and support use of the watershed as a research ground for academia, when appropriate.

Objective 4 (contin.) – Technology, Innovation, and Process Improvements

- Strengthen succession planning by identifying and addressing gaps in documented standard operating procedures (SOPs) and ensuring an overlap of training for key positions.
- Begin conversion to advanced metering infrastructure (AMI) across the service area and develop and launch associated customer portal to increase customer awareness of water use.
- Complete a selection process for upgrading the current enterprise resource planning system (SAP) and implement the upgrade to ensure maximized system use and integration capabilities across various operational functions.
- Replace the online customer bill pay system with a new system that improves self-service options for customers.

Next Steps

Progress Reporting

- Five strategic goals and 24 objectives set the direction and priorities for the next five years – this includes 113 actions that represent our best understanding **today** of what is needed to advance goals and objectives.
- We expect new information to be learned as actions are implemented and conditions and circumstances will change and evolve throughout this time.
- Adaptive management approach will be utilized to report progress and adjust action plans to advance the goals.
- Planning, managing, and reporting for each goal will be accomplished through annual work plans.

Next Steps

Progress Reporting (contin.)

- Work plans will be discussed during the annual Board retreat to review and confirm overall direction and define the actions, budget, and resources for the next fiscal year.
- During annual board retreats, staff will review and report on the following for each goal:
 - Progress and accomplishments on the objectives and actions identified.
 - Learnings and innovations from the previous year.
 - Assessment of the long-term progress toward the goal.
 - Adjustments and changes based on progress or changing circumstances.
 - Planned actions, resources, and partnerships for the coming year.
- Updates on the progress of annual work plans will be provided to the Board during regularly scheduled board meetings on a quarterly basis.

Recommendation

Adopt the District's proposed 2024 five-year strategic plan.