




**MARIN
WATER**

2025 Board of Directors Retreat

January 14, 2025





Recapping the Year 1 Strategic Work Plan (2024)

Highlights of Completed 2024 Work Plan Actions

- ✓ **Developed Water efficiency Master Plan and began implementation.**
- ✓ Updated water efficiency incentives using data-driven decision making.
- ✓ Completed water loss study and began implementation of priority actions, including new pilots to reduce water loss.
- ✓ **Hired AMI Program Manager and developed District-wide AMI implementation timeline.**
- ✓ Rescinded Graywater Ordinance and adopted turf limits for new development.
- ✓ **Installed stream release gauge at Lagunitas Creek.**
- ✓ Completed desalination feasibility analysis for Petaluma River.
- ✓ Secured TNI accreditation for water quality lab.
- ✓ **Completed fire hardening/condition assessment of pump stations and spillways.**
- ✓ **Developed resource plan for enhanced CIP.**





Highlights of Completed 2024 Work Plan Actions

- ✓ Executed on-call engineering contracts for specialty support needs.
- ✓ Completed assessment of pavement criteria.
- ✓ **Reviewed/updated 143 SOPS in operations + created 25 new SOPS.**
- ✓ **Formed pipe-tapping team to train and compete at conferences.**
- ✓ **Completed construction of Phase 1A of the Lagunitas Creek Habitat Enhancements Project.**
- ✓ Installed 2 Passive Integrated Transponders Antennas in Lagunitas Creek to improve fisheries monitoring data collection.
- ✓ Completed Year 5 BFFIP priorities, covering 1,500 acres of vegetation management and forest restoration work.
- ✓ Secured \$500,000 in CCNB crew time for FY 24/25.
- ✓ **Secured contract with Marin County Fire Foundry Program to support early career development.**
- ✓ Secured Grizzly Corps Fellow and WSP participants for FY 2025.

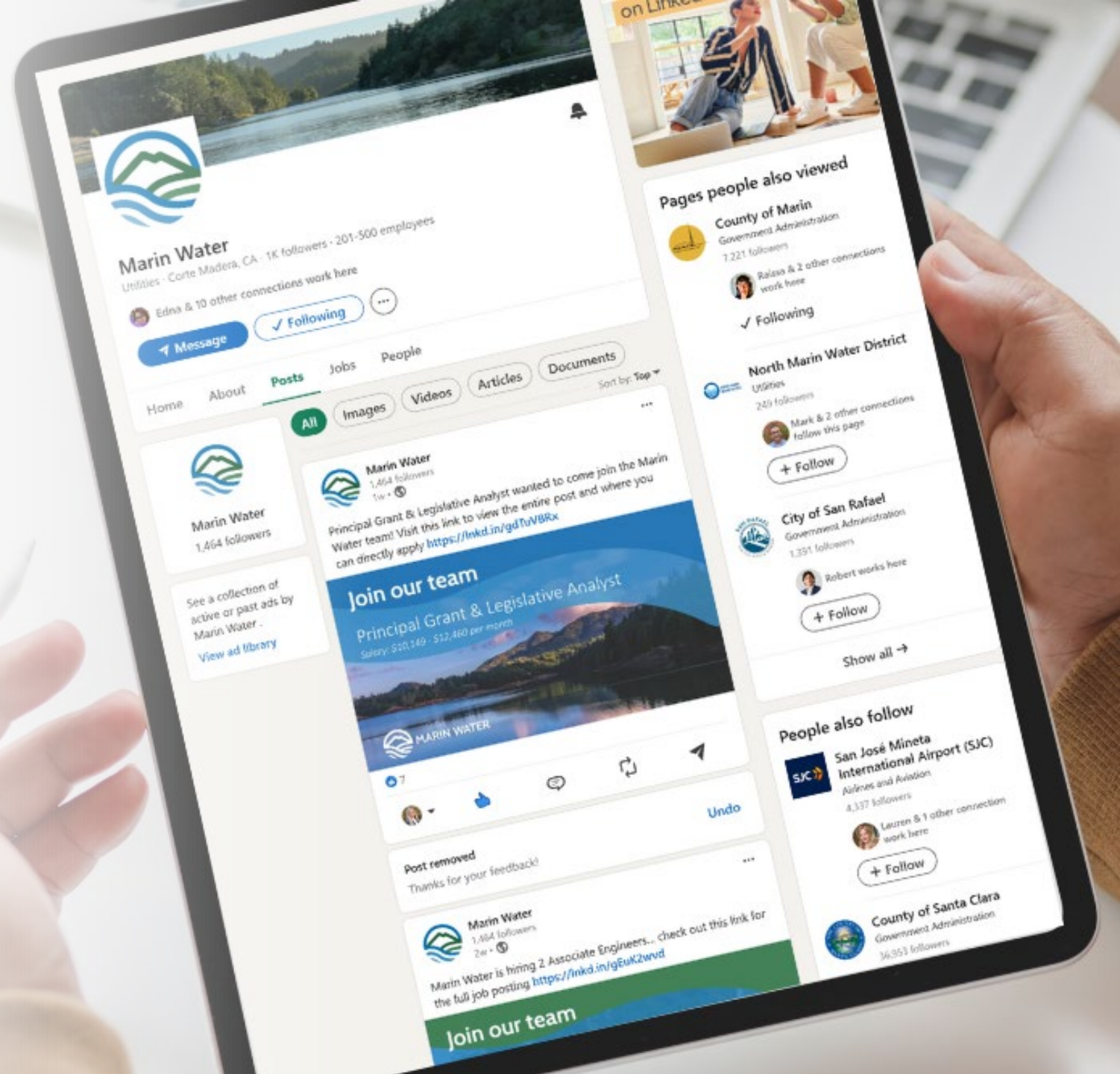


Highlights of Completed 2024 Work Plan Actions

- ✓ Contributed to the development of One Tam's Peak Health Report, Strategic Plan and Annual Work Plan.
- ✓ Renewed the District's MOU with One Tam.
- ✓ Held two sets of trail maintenance training for seasonal staff and Ranger trainees to build additional capacity for volunteer trail stewardship work.
- ✓ Launched monthly trail maintenance and stewardship program to engage community members, non-profits and youth in watershed stewardship.
- ✓ Launched quarterly watershed hike/community event series.
- ✓ **Completed Watershed Recreation Management Planning Feasibility Study.**
- ✓ **Improved 1.9 miles of Azalea Hill Multi-Use Trail and completed rare plant compliance survey work.**
- ✓ Developed Rock Springs prescribed fire self-guided tour to broaden public understanding of fire fuel management and forest restoration work.
- ✓ **Installed large-scale signage along Lagunitas Creek Enhancement Project area to increase public awareness of the project.**

Highlights of Completed 2024 Work Plan Actions

- ✓ Completed the Connection Fee Study.
- ✓ Received revised credit quality outlook from credit agency – went from "stable" to "positive" – and our overall credit rating was affirmed at AA.
- ✓ **Published a new online customer bill estimator tool that includes seasonal household water efficiency estimator feature.**
- ✓ Implemented ongoing practice of publishing quarterly financial statements to the District's website.
- ✓ Completed an external financial audit.
- ✓ **Developed suite of new recruitment template materials to help with attracting diverse applicant pool to District job openings.**
- ✓ Launched LinkedIn as an owned District social media channel and developed a plan for publishing ongoing curated content to build a deeper following and channel engagement.



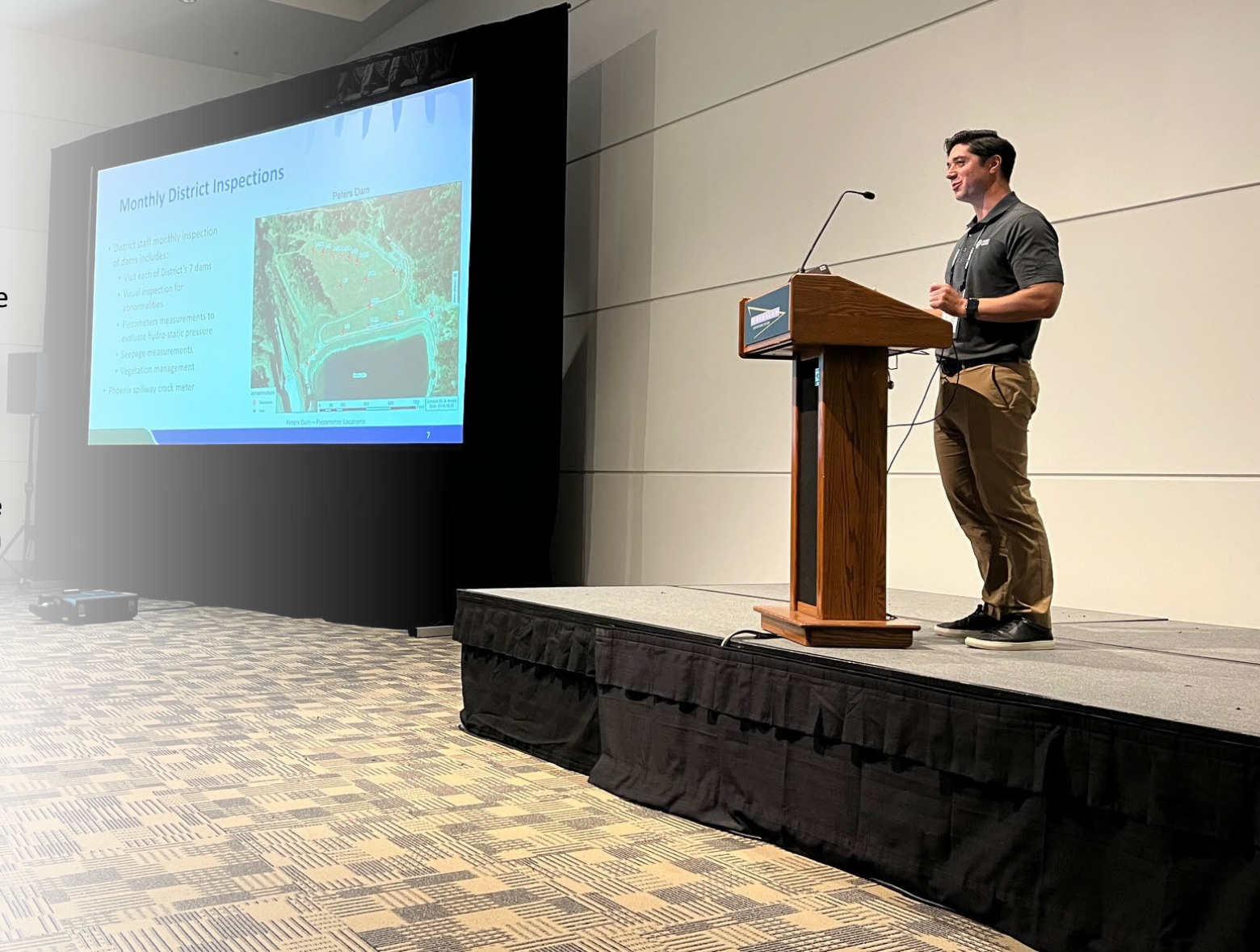


Highlights of Completed 2024 Work Plan Actions

- ✓ **Hired Training & Organizational Development Analyst and launched year-long onboarding program for new hires.**
- ✓ **Implemented DEI training for all District employees.**
- ✓ **Transitioned to division-hosted Quarterly Employee Appreciation events to provide opportunity for greater staff involvement and to encourage the infusion of diverse ideas and activities into the plans for staff gatherings.**
- ✓ **Established RIPPLE, a new internal staff engagement committee. Some key initiatives that have emerged out of the newly established RIPPLE Committee include:**
 - **Updated Employee Retiree Recognition policy**
 - **New Team-Building program and policy**

Highlights of Completed 2024 Work Plan Actions

- ✓ **Launched the Employee Impact+, a new internal quarterly publication that was shaped with employee input and meant to strengthen alignment and build broader awareness of District happenings throughout the organization.**
- ✓ **Developed new project identification signage to be installed at all CIP project sites as a strategy for communicating how customer rate revenues are applied back into the water system.**
- ✓ **Combined the use of new targeted advertising strategies with customer water usage data to fine tune the distribution of water efficiency outreach campaigns to the District's high-water users.**
- ✓ **Presented at the Association of State Dam Safety Officials (ASDSO) Dam Safety Conference in September, shining a spotlight on Marin water dams and the effort behind maintaining this critical infrastructure.**



Highlights of Other Key Items Completed in 2024

(not identified in the 2024 Work Plan)

- ✓ Implemented a long-term temporary solution for a portable pump station to operate in the Fairfax Manor neighborhood following the total devastation of the permanent pump station at this location due to a heavy equipment accident involving a PG&E contractor.
- ✓ Identified opportunity to modify Nicasio Reservoir spillway as a new near-term storage enlargement project and expedited it into the early stages of implementation with work on the project's design, environmental review and permitting all now underway.





2025 Annual Strategic Work Plan

Goal 1: Reliable Water Supply

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

Five-Year Objectives:

1. Reduce Potable Water Use
2. Augment Existing Water Supply
3. Preserve and Enhance Existing Partnerships
4. Provide High-Quality Water to Customers



Goal 1 - Objective 1: Reduce Potable Water Use

Reduce water use and water waste by 800 acre feet in the next five years to conserve our resources and ensure we meet or exceed the statewide indoor residential water use target of 47 gallons per capita per day by 2025 and are on track to meet water use objectives established for the District by 2030.

- ✓ a. 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.
- ✓ b. Enhance incentives, education, and outreach to our customers that effectively reduce water use.
- ✓ c. Implement the recommendations from the District's water loss control and leak detection program update, using most current industry practices and leveraging innovative technologies.
- ✓ d. Participate in and support the development of regulations and legislation that drive water efficiency through participation in industry associations.
- ✓ e. Identify opportunities for partnerships in testing new technologies or theories to reduce water use.
- ✓ f. Review a range of policy options to further advance water efficiency.

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Water Efficiency Concepts and Strategies Toward Short and Long-Term Goals	Continue implementation of 5-Year Water Efficiency Master Plan action items.	Ongoing	Budgeted
	Evaluate incentive offerings and revise to align with achieving goals in Water Efficiency Master Plan, recommend program changes and/or updated based on evaluation.	Ongoing	Budgeted
b. Water Efficiency Incentives, Education and Outreach	Launch outreach campaign to promote increased rebates to maximize the grant funding that has been awarded for turf removal.	Begin in Q1	Budgeted
	AMI Implementation – Update to Board. AMI Implementation - Request For Proposal.	Q1 Q3	Budgeted Budgeted
c. Implementation Of Water Loss Control and Leak Detection Program Recommendations	Implement pilot to evaluate acoustic hydrant loggers and AMI meters, which may log district-side leaks.	Begin in Q1; Study findings complete by Q3	Budgeted
d. Industry Association Participation	Participate in the Water Research Foundation’s Residential End Use Study..	Study Projected for Completion Q4	Budgeted

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Partnerships to Test Technologies/Theories	Evaluate effectiveness of the turf rebate increase leveraging multi-benefit funding from Marin County Storm Water Pollution Prevention Program.	Complete by Q4	Budgeted
	Partner with Marin Wildfire Prevention Authority to ensure incentives and programs support wildfire resistant landscapes.	Complete by Q4	Budgeted
	Conduct turf removal participation survey and develop targeted programs.	Complete survey in Q1; measures by Q3	Budgeted
f. Policy Review	Align Water Efficient Landscape Ordinance with State rulemaking, which is underway.	Complete by Q3	Budgeted
	Begin process for extending Local Jurisdictions MOU which expires Dec. 31, 2025.	Begin by Q2	Budgeted

Goal 1 - Objective 2: Augment Existing Water Supply

Fully implement the Strategic Water Supply Roadmap's 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).

- ✓ a. 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):
 - Reduce water use and waste by 800 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.

- ✓ b. 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 the preferred Marin-Sonoma Regional Water Conveyance project alternative and begin the next steps.
 - Select the preferred Local Storage Improvement project alternative and begin the next steps.
 - Provide ongoing progress updates on Roadmap projects

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Roadmap Short-Term Actions	1. Water Efficiency actions outlined in Obj. 1.	1. Q1-Q4	1. Budgeted
	2. Soulajule to Nicasio Pipeline – Easement acquisition, design & CEQA.	2. Q2	2. Budgeted
	3. Complete Stream release automation.	3. Q3	3. Budgeted
	4. Present emergency supply plan.	4. Q2	4. Budgeted
	5*. Nicasio Spillway Modifications – environmental review and permit submittal.	5. Q1-Q4	5. Budgeted
b. Roadmap Medium Term Projects and Longer-Term Goal Update	1. Select preferred Water Supply Roadmap Project for further development.	1. Q2	1. Budgeted

* New 5-year action item, not identified in the District’s 2024-2028 Strategic Plan

Goal 1 - Objective 3: Preserve and Enhance Existing Partnerships

Work towards regional approaches to increase the resiliency of our water supply.

- ✓ a. Develop partnerships to support recycled water projects.
- ✓ b. Renew agreement with Sonoma Water to ensure continued access to supplemental water supply.
- ✓ c. 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.
- ✓ d. Seek support from State and Federal agencies for the development of Regional Water Supplies.

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Recycled Water Project Partnerships	Continue relationship building with North Bay Water Reuse Authority and local sanitation districts.	Ongoing	Budgeted
b. Sonoma Water Agreement Renewal	Execute renewal agreement with Sonoma.	Q1	Budgeted
c. Relationship Building for Regional Water Supply Projects	Strategic meetings with Sonoma Water and contractors on regional water supply planning.	Ongoing	Budgeted
d. State And Federal Support for Regional Supply Development	<ol style="list-style-type: none"> 1. Receive WRDA Funding. 2. Seek funding for recycled water projects. 	<ol style="list-style-type: none"> 1. TBD 2. Q1-Q2 	Budgeted

Goal 1 - Objective 4: Provide High-Quality Water to Customers

Cost effectively manage our water system to ensure water quality is protected from the source to our customers.

- ✓ a. Develop Reservoir Management Plans for Alpine, Bon Tempe, Kent, Nicasio and Soulajule that include water quality objectives and algae management strategies.
- ✓ b. Develop improvements to water treatment options for removal of taste and odors in drinking water and other improvements to water quality.
- ✓ c. Ensure that the Water Quality lab is accredited to The NEALAC Institute's (TNI) latest accreditation standard for compliance analyses.
- ✓ d. 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
- ✓ e. environment through participation with industry groups and associations.

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Reservoir Management Plans	Review industry best practices for reservoir management.	Q2	Budgeted
b. Water Treatment Option Improvements	1. Following successful liquid ammonium sulfate Pilot study develop next steps.	1. Q4	1. Budgeted
	2. Review disinfection practices at treatment plants.	2. Q2	2. Budgeted
c. Water Quality Lab	Complete refocus of Lab resources to distribution system and reservoir management.	Q1	Budgeted
d. Water Quality After Wildfires/ Industry Lessons Learned	Develop summary of wildfire impacts to water quality in surface water reservoirs and impacts to conventional drinking water treatment.	Q3	Budgeted
e. Regulation Development	Monitor proposed and upcoming regulations for drinking water.	Ongoing	Budgeted

Goal 2: Resilient Water System

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

Five-Year Objectives:

1. Infrastructure Condition Assessment
2. Capital Planning
3. Capital Project Delivery
4. Operations and Maintenance
5. Energy Planning
6. Emergency Response Readiness



Goal 2 - 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.

- ✓ a. Complete above-ground facility condition assessment.
Pump stations: 30 evaluated, 67 remain.
Tanks: 99 evaluated, 31 remain.
- ✓ b. 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.
- c. Perform condition assessments for large infrastructure such as dams and treatment plants.
- ✓ d. 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.
- ✓ e. 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.
- ✓ f. Identify single points of failure throughout the water system and incorporate them into the capital planning and prioritization efforts.
- ✓ g. Review industry standard security measures across the water system and identify needs for improvement and incorporate them into the capital planning and prioritization efforts.
- ✓ h. 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.

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Above Ground Facility Assessment	Initiate condition assessment process for remaining tanks and pump stations.	Begin in Q1	Budget Modification Needed
b. PRP Prioritization Process Review	Refine and bring to Board an updated process for prioritization. Update could occur with Water System Master Plan presentation identified in Objective 1.h.	To the Board by Q1	n/a
d. Workplace Facilities Plan	Complete facilities plan.	Begin in Q1	Budget modification needed
e. Above-ground Infrastructure Hardening	Completed - Fire hardening assessments for all pump stations have been completed and information will be incorporated into action item for the overall condition assessment of pump stations and tanks.	COMPLETE	---
f. Water System Single Points of Failure Assessment/CIP Incorporation	Begin assessment to integrate into CIP effort following completion of Water System Master Plan (WSMP) Objective 1.h.	Begin in Q1	n/a
g. Water System Security Measures	Enhance facility security standards that will be used to evaluate the Above Ground Condition Assessment infrastructure and identify security needs to be prioritized in the capital planning effort. Tied to Objective 1.a.	Begin in Q1	n/a
h. Water System Master Plan	Complete and use information from the WSMP to identify and prioritize infrastructure capital replacement projects. Presenting to the Board in January 2025.	By Q1	Budgeted

Goal 2 - 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.

- ✓ a. 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.
- ✓ b. Continue to identify grant opportunities to offset costs borne by ratepayers.
- ✓ c. Evaluate bond funding opportunities for large capital projects that provide generational value.

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Planning with Infrastructure Condition Assessment/Other Data	Develop long-term CIP.	Begin in Q2	Budgeted
b. Project Grant Opportunities	Continue to identify grant funding opportunities that are a fit for the Districts capital projects.	Ongoing	Budgeted
c. Bond Funding Opportunities for Generational Projects	Captured in Goal 4, Objective 4b.	--	--

Goal 2 - Objective 3: Capital Project Delivery

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

- ✓ a. Assess resource needs to meet the increased capital improvement program, including leveraging District staff with support from external engineering consultant firms.
- ✓ b. 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.
- ✓ c. 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.
- ✓ d. Review and update necessary sections of the District's contract specifications to the most current industry standards.
- e. Explore the opportunity for innovative approaches to project implementation, including design-build options for larger capital projects.
- ✓ f. Continue working with local municipalities to achieve a more cost-effective approach to paving restoration requirements.

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Resource Needs Assessment	Completed - resource planning analysis was finished; leveraged several position conversions with 4 new positions resource needs will be evaluated on an ongoing basis.	COMPLETE/Ongoing	Budgeted
b. On-Call Contracts for Expedited Small Repairs	Completed - executed on-call construction contracts to expedite small capital work and will continue to utilize such contracts into the future.	COMPLETE/Ongoing	Budgeted
c. On-Call Engineering Firm Consulting Contracts	Completed - executed on-call geotechnical and civil engineering design contracts to streamline workflow and productivity.	COMPLETE/Ongoing	Budgeted
d. District Contract Specifications Update	Update District contract specifications to most current Construction Specifications Institute Master format.	Begin by Q3	n/a
f. Paving Restoration Requirements	Initiate discussions with neighboring jurisdictions now that the pavement assessment criteria has been established with a paving expert.	Begin in Q1	Budgeted

Goal 2 - 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.

- ✓ a. 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.
- ✓ b. Establish standard operating procedures to support training and provide for transfer of institutional knowledge.
- ✓ c. Encourage staff involvement in industry associations to provide learning opportunities.
- ✓ d. Review the organizational structure of Operations, including classifications, to ensure the most effective utilization of District resources.
- ✓ e. Identify opportunities to implement technological advancements in equipment and practices to improve efficiencies.

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Division Training Program	Formalize training to ensure new and current employees receive consistent training within their departments.	Ongoing	n/a
b. Standard Operating Procedure Development	Review/update or develop 5-10 SOPs this year.	Finish in Q4 2025	n/a
c. Learning Through Industry Associations Involvement	Continue developing the “Pipe Tapping Team” to compete at state and regional conferences. Offer opportunities for staff to engage and learn through industry associations.	Compete at regional AWWA conference. Staff attending conferences.	Budgeted
d. Operations Organizational Structure Review	Consistently review when filling vacancies	Ongoing	n/a
e. Efficiency Improvements via Equipment and Process Advancements	Continue to engage staff and develop a list of equipment/practices to improve efficiency, safety, effectiveness, and staff’s work.	Ongoing	n/a

Goal 2 - Objective 5: Energy Planning

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

- ✓ a. Meet or exceed new fleet vehicle regulatory changes including the expansion of the District's fleet to electric vehicles and needed EV charging stations.
- ✓ b. 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.
- ✓ c. Engage in discussion with the Board on carbon neutrality to establish appropriate goals, policies, and direction.
- ✓ d. Review and evaluate the application of micro-turbine technology where applicable as an energy recovery and cost-saving option.
- ✓ e. Evaluate renewable power opportunities throughout the District.

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Fleet Regulatory Compliance	Hire consultant to design EV charging stations from District Fleet Vehicles.	Begin in Q1	Budgeted
b. Pump Station Evaluation for Alternative Energy Use	Evaluate feasibility of integrating solar with pump station rehabilitation projects following completion of Objective 1.a.	Ongoing	n/a
c. Carbon Neutrality	Initiate carbon neutrality policy discussion with the Board.	Begin in Q4	n/a
d. Micro-Turbine Technology	Completed – presented micro-turbine and pump storage findings to the Board at the Operations Committee Meeting on July 19, 2024.	COMPLETE	---
e. Renewable Power Opportunities	Presented finding to Board at July 19, 2024 OPS meeting. SGTP clear wells were identified as good options for solar. Staff will be conducting structural assessment of the clear wells for solar options.	By Q4	Budget modifications needed

Goal 2 - 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.

- ✓ a. Update the District's emergency response plan to reflect current needs, priorities, and threats.
- ✓ b. Conduct a minimum of two annual tabletop exercises involving the District's Emergency Operations Center (EOC) to ensure emergency readiness.
- ✓ c. 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.
- ✓ d. Participate in emergency preparedness trainings in coordination with Marin County Office of Emergency Services on countywide emergency response scenarios.
- ✓ e. Establish FEMA-compliant contracts for engineering and construction services that are ready to be executed following an emergency.
- ✓ f. Continue to assess and identify opportunities to reduce risk throughout the District.

5-YR ACTION ITEM	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Emergency Response Plan Update	Update our employee notification system as it pertains to response expectations before, during and after an incident.	By Q3	n/a
b. Annual EOC tabletop Exercises	Train District staff with a designated role in the EOC and ICS Organizational Structure. Conduct an EOC-activation drill from the moment an incident occurs through the completion of an initial Incident Action Plan.	By Q2; Ongoing	n/a
c. Dam EAP Review and Tabletop Exercises	All seven dam EAP's have been accepted by Cal OES. Periodic review of contact information to occur on a yearly basis with full EAP reviews every five years.	Ongoing	n/a
d. Emergency preparedness training with Marin County OEM	Participate in County Office of Emergency Management monthly meetings.	Ongoing	n/a
e. FEMA-compliant Contracts for Disaster Recovery Needs	Staff finalizing development of FEMA compliant contract templates that will be ready to use following emergencies. Targeting completion early 2025.	By Q1	n/a
f. Risk Reduction Assessments	Water system single points of failure assessment including fire hardening and security measure assessments as (outlined in obj. 1).	Begin in Q3	n/a

Goal 3: Watershed Stewardship

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

Five-Year Objectives:

1. Creek Restoration
2. Watershed Resiliency and Wildfire
3. Stewardship
4. Recreation
5. Facilities



Goal 3 - Objective 1: Creek Restoration

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 and ensure thriving populations of threatened and endangered species within Lagunitas Creek.

- ✓ a. 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.
- b. In alignment with the Lagunitas Creek Stewardship Plan (LCSP), complete annual fisheries lifecycle monitoring and habitat enhancement effectiveness monitoring; coordinate with the Lagunitas Technical Advisory Committee and regional monitoring efforts to update the LCSP.
- ✓ c. Integrate new monitoring technology by expanding a network of Passive Integrated Transponders Antennas to improve fisheries monitoring data.
- ✓ d. 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.

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Lagunitas Creek Restoration	Initiate implementation of Phase 1B (Sites 1, 2, 3, 12 and 13)	Q3	Budgeted/Grants
c. PIT Program	Annual PIT program monitoring and gravel augmentation study	Q4	Budgeted/Grants
d. Apply technical expertise to regional restoration projects	Complete Nicasio Creek Fisheries Study.	Q4	Budgeted

Goal 3 - 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.

- ✓ a. 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.
- ✓ b. 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.
- ✓ c. Advance strategic 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.
- ✓ d. Support 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.
- ✓ e. 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.

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Public Safety Partnerships	Coordinate 2-3 inter agency trainings for search and rescue, and wildfire response	By Q4	n/a
b. Biodiversity, Fires, and Fuels Integrated Plan	<p>Complete BFFIP priorities to achieve 1,500 acres of vegetation management and forest restoration projects. Integrate pathway modeling to inform and refine treatment priorities.</p> <p>Complete needed environmental compliance and associated program planning, contracting, monitoring and grant reporting.</p> <p>Continue developing burn plans to support implementation of prescribed fire on the watershed.</p>	By Q3	Budgeted/Grants
c. Strategic Partnership for Regional Resiliency	Continue collaboration with Marin Prescribed Burn Cooperative, Marin Wildfire Prevention Authority, and One Tam Forest Health Strategy	Ongoing	n/a
d. Workforce Development	<p>Ranger Trainee’s complete Ranger I certifications</p> <p>Site Sponsor for AmeriCorps Watershed Stewardship Program to support fisheries and Grizzly Corps Fellow to support the volunteer program.</p> <p>Collaborate with Fire Foundry, California Conservation Corps, and California Conservation Corps North Bay to support BFFIP implementation, trails and water restoration projects</p>	<p>Q3</p> <p>Q2</p> <p>Q4</p>	Budgeted
e. Wildland Firefighting and Vegetation Equipment	Evaluate options on the used market to replace Water Tender. Add one additional Ranger Vehicle to fleet to support staff.	By Q4	Budgeted/ Modification may be needed

Goal 3 - Objective 3: Stewardship

Advance stewardship and climate adaptation strategies through technical studies and regional partnerships, and through enriching volunteer programs, provide opportunities for the community to contribute to preserving our water supply, protecting biodiversity and caring for our shared natural resources.

- ✓ a. Sustain annual biological monitoring to inform scientific knowledge of the watershed and to support environmental compliance for District operations and long-term planning.
- ✓ b. 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.
- ✓ c. Evaluate opportunities for integrating regional restoration and stewardship plan priorities into watershed restoration efforts.
- ✓ d. Lead habitat restoration, trail maintenance, environmental education, and community science projects and programs that involve community members in improving the health of the watershed.
- ✓ e. Advance natural resources interpretation offering to help advance community education and awareness of the watershed's unique biodiversity and water resources.

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Annual Biological Monitoring	Complete annual biological monitoring per BFFIP, Lagunitas Creek Stewardship Plan, and to support project level compliance	Q4	Budgeted
b. Regional Partnerships	Contribute staff expertise to advance One Tam Annual Work Plan, TOGETHER Bay Area, California Landscape Stewardship Network, and Golden Gate Biosphere Network	Ongoing	n/a
c. Regional Restoration Opportunities	Evaluate multi-benefit opportunities associated with Nicasio Spillway Project	Q4	n/a
d. Stewardship Programs	Sustain trail stewardship events and establish contract with trail maintenance contractor	Q4/Ongoing	Budgeted
e. Natural Resources Interpretation	Hosting quarterly watershed interpretive hikes	Q4	Budgeted

Goal 3 - Objective 4: Recreation

Manage watershed visitation for water quality protection and to connect visitors to the watershed through recreational opportunities and stewardship initiatives to maintain a welcoming and enriching environment that support visitors.

- ✓ a. Complete Watershed Recreation Management Planning Feasibility study to support visitors and protect water resources and biodiversity as an ongoing adaptive management strategy and evaluate the capacity to do so.
- ✓ b. Complete the Azalea Hill Trail Restoration Project through enhancement of trail facilities and removal of social trails to restore sensitive habitats.
- ✓ c. Evaluate priority roads and trails to inform adaptive management while 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.
- ✓ d. Create nature-based self-guided tours and outreach materials to help educate the community about the watershed's biodiversity, water resources, wildfire issues, and climate change.

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. Watershed Rec Mgmt Planning Feasibility Study</p>	<p>Advance strategic opportunities outlined in the feasibility study.</p>	<p>Q4</p>	<p>Budgeted</p>
<p>b. Azalea Hill Trail Restoration Project</p>	<p>Complete liberty gulch segment, update compliance document, and initiate parking lot design work.</p>	<p>Q3</p>	<p>Budgeted</p>
<p>c. Evaluate Priority Roads and Trails</p>	<p>Develop Request for Proposals to initiate watershed roads and trails project.</p>	<p>Q3</p>	<p>Budgeted/ Modification may be needed</p>
<p>d. Nature-based Self-guided Tours and Outreach Materials</p>	<p>Update 2-3 watershed kiosks.</p>	<p>Q3</p>	<p>Budgeted</p>

Goal 3 - Objective 5: Facilities

Ensure that watershed facilities are operational and well-kept to support four needs: emergency response readiness, water system operations, visitor access for recreational and educational purposes, and ongoing environmental restoration efforts within the watershed.

- ✓ a. 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.
- ✓ b. Integrate watershed facilities into the facilities planning process to guide key updates to Sky Oaks Headquarters, and maintenance yards and explore opportunities for environmental education spaces and visitor infrastructure.
- ✓ c. Maintain existing watershed housing and evaluate opportunities for watershed seasonal employee housing to help remove barriers for early career professionals looking to work in the natural resources field in Marin County.

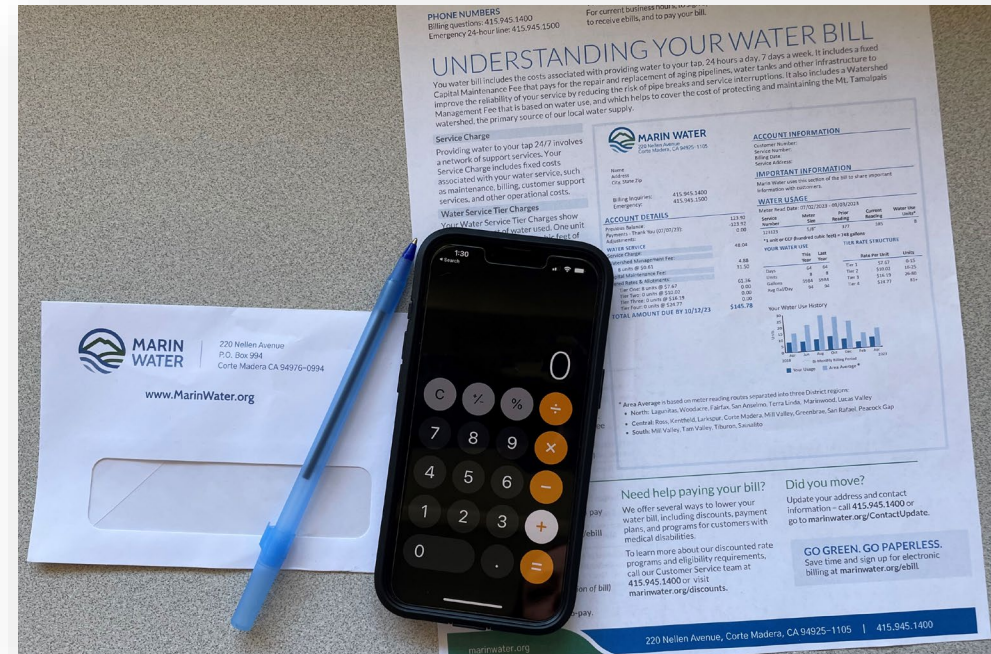
5-YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. Roads and Trails Management Plan</p>	<p>Develop Request for Proposals to initiate watershed roads and trails project.</p>	<p>Q3</p>	<p>Budget modification needed</p>
<p>b. Integrate Watershed Facilities into Master Planning Process</p>	<p>Captured in Goal 2, Obj. 1d.</p>	<p>---</p>	<p>---</p>
<p>c. Watershed Housing</p>	<p>Focused on improving Sky Oaks Headquarters.</p>	<p>Ongoing</p>	<p>---</p>

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.

Five-Year Objectives:

1. Financial Stability
2. Fair, Equitable and Proportional Rates
3. Cost-Effective Business Processes
4. Outside Funding to Reduce Financial Impacts on Ratepayers
5. Financial Transparency



Goal 4 - 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.

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

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. Stabilization Reserves</p>	<p>Completed - the Board approved revisions and additions to the District’s reserve policy (46) to add clarity to the definition, purpose and calculations for each of the existing reserve funds and added an additional reserve fund for Water Supply Projects.</p>	<p>COMPLETE</p>	<p>---</p>
<p>b. Long-Term Capital Improvement Program with Stable Investments</p>	<p>As part of the upcoming two-year budget process, Finance and Engineering will work to integrate recent engineering studies into the 20-year Capital Improvement Program.</p>	<p>Q2</p>	<p>n/a</p>
<p>c. Non-Rate Revenue Updates</p>	<p>Review non-rate revenues as part of the budget process in 2025.</p>	<p>Q2</p>	<p>n/a</p>

Goal 4 - 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.

- ✓ a. Conduct a connection fee study to fully capture the cost of current and future infrastructure needs.
- ✓ b. Evaluate the District's low-income program and identify strategies to ensure qualified customers are enrolled.
- c. 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.
- d. Implement a robust outreach plan throughout the 2027 rate-setting process to inform customers about proposed changes.

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Connection Fee Study	Present recommendations to the Board.	Q1	No
b. Low-Income Program Evaluation	Evaluate program to determine whether criteria can be modified.	Q3	No

Goal 4 - Objective 3: Cost-Effective Business Processes

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

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

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. SAP Update to Streamline Processes and Improve Analytics</p>	<p>Award contract for Payroll and HR module Systems Integrator contract; engage outside consultant to evaluate customer service and maintenance module needs.</p>	<p>Contract award by Q1; Consultant evaluation by Q2</p>	<p>Budgeted</p>
<p>b. Leverage External Resources for Efficiency</p>	<p>Evaluate the benefits and potential tradeoffs of utilizing additional consulting service for project implementation in the Engineering Division; continue to leverage expertise and assistance from the Fire Foundry and the CCNB to support the Watershed Division.</p>	<p>Ongoing</p>	<p>---</p>
<p>c. AA or Better Credit Quality Rating</p>	<p>Continue to meet with credit ratings agencies on an annual basis and work to prioritize issues that impact long term rating criteria.</p>	<p>Ongoing</p>	<p>---</p>
<p>d. Online & Electronic Bill Payments</p>	<p>Transition to a new online customer bill payment system.</p>	<p>Q2</p>	<p>Budgeted</p>
<p>e. Streamline the Application Process for Discount Programs and Leak Adjustments</p>	<p>Continue to identify processes that can be eliminated or reduced.</p>	<p>Ongoing</p>	<p>---</p>

Goal 4 - 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.

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

Goal 4 – Objective 4: Outside Funding to Reduce Financial Impacts on Ratepayers

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. WRDA Funding for Water Supply Projects	Continue to engage USACE in an effort to get funding appropriation for Marin Water projects.	Q4	Budgeted
c. State and Federal Grants	Respond to state and Federal grant funding solicitations that align with District near term projects	Q4	n/a
e. Leverage Regional Partnerships	Continue to work with the Marin Wildfire Prevention Authority, One TAM, the County of Marin and Sonoma Water to implement best practices and maximize grant opportunities.	Ongoing	n/a

Goal 4 - Objective 5: Financial Transparency

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

- ✓ a. Improve online tools for customers to understand their bill.
- ✓ b. Conduct bi-annual reviews of fiscal policies.
- ✓ c. Publish quarterly financial summaries.
- ✓ d. Conduct regular internal and external financial audits.
- ✓ e. 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.

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. Online Customer Tool Improvements</p>	<p>Completed – Implemented roll out of customer bill estimator on the District website in 2024.</p>	<p>---</p>	<p>---</p>
<p>b. Bi-annual fiscal policies review</p>	<p>Completed in 2024 – this will be an ongoing effort as part of the budget and rate setting process.</p>	<p>COMPLETE/ongoing</p>	<p>n/a</p>
<p>c. Quarterly Financial Summary Publication</p>	<p>Completed - Quarterly financial updates are now being posted routinely to the District’s Financial Information webpage.</p>	<p>COMPLETE/ongoing</p>	<p>---</p>
<p>d. Regular Internal and External Financial Audits</p>	<p>Complete - The external audit was completed in November 2024; additional areas for audit and related process improvements will be identified as part of the ERP Modernization project.</p>	<p>COMPLETE/ongoing</p>	<p>---</p>
<p>e. Proactive Customer Communications for Grants and Investments in Key Priorities</p>	<p>Disseminate news releases and other outreach messaging channels to announce receipt of grant awards and to share updates of how funds are used for project implementation.</p>	<p>Ongoing</p>	<p>n/a</p>

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.

Five-Year Objectives:

1. Organizational Culture and Values
2. Customer Experience
3. Industry Engagement, Growth, and Leadership
4. Technology, Innovation, and Process Improvements



Goal 5 - Objective 1: Organizational Culture and Values

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

- ✓ a. Strengthen recruitment collateral to attract diverse candidates and promote the Marin Water team, accomplishments, brand, and culture.
- ✓ b. Continue to grow with community-based organizations and explore new partnership opportunities with local colleges and trade schools to connect local community members, particularly those in underserved communities, with Marin Water career opportunities.
- ✓ c. 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.
- ✓ d. Complete diversity, equity, and inclusion training throughout the organization and fold it into the onboarding process to help foster a sense of belonging across the workforce.
- ✓ e. 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.
- ✓ f. Engage staff to evaluate current recognition and appreciation programs, research employer best practices, and refresh the District's employee recognition and appreciation programs.
- ✓ g. 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.
- ✓ h. Increase employee engagement and organizational improvement through periodic employee surveys, with the next one to be distributed in 2024, and implement follow-through initiatives.
- ✓ i. Maintain a culture of workplace safety through a continuous commitment to safety education, training, compliance, and communication.
- ✓ j. Assess and evaluate the District's current work facilities to identify needed upgrades and enhancements to support a safe and productive work environment.

5-YEAR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. Recruitment Collateral</p>	<p>Redesign the District employment website landing page to add features that improve navigation, showcase District accomplishments and provide a sense of workplace culture.</p>	<p>By Q3</p>	<p>n/a</p>
<p>b. Recruitment Partnerships with local Community Orgs, Colleges, Trade Schools</p>	<p>Continue participation in the monthly Baywork meetings to establish a Baywork Northbay consortium focused on outreach to community colleges, high schools and community-based organizations for the purposes of developing awareness of careers in the water industry and sharing career and internship opportunities.</p> <p>Host the Baywork for their Northbay “Workshop on Wheels.”</p> <p>Continue to send weekly digest emails containing Marin Water job opportunities to agencies listed on our established community outreach list. Continue to develop the outreach list.</p> <p>Attend community career fairs as available.</p>	<p>Ongoing</p> <p>Q2</p> <p>Ongoing</p> <p>Ongoing</p>	<p>Budgeted</p>
<p>c. Welcoming Onboarding Process</p>	<p>Completed – new onboarding process was developed and rolled out; process will continue to be utilized for new employees and fine-tuned, as needed.</p>	<p>COMPLETE/ ongoing</p>	<p>---</p>
<p>d. Diversity, Equity and Inclusion Training</p>	<p>Completed - All existing employees went through training and training is integrated into the onboarding process for new employees.</p>	<p>COMPLETE/ ongoing</p>	<p>---</p>

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Employee Training Program	Finalize and launch a 5-year training program to include training for all staff and tailored for specific classification groups. Training will cover soft skills training (example: customer service), leadership training, management training and some technical training (examples: MS Office & 365, SAP and support for technical training for specific departments and classifications).	Q1	
	The training program will include a 3 - day leadership academy as baseline training. Managers and supervisors who have not completed the academy will be enrolled in the Winter 2025 and Spring 2025 academies.	Q1 – Q3	Budgeted
	Implement learning aids on topics beneficial to the organization. For example: To support employees seeking internal promotions, a learning aid on interviewing techniques has been developed; sessions will begin in January 2025.	Q-1 - Q3	
f. Employee Recognition and Appreciation Programs	Refresh the quarterly employee recognition program and the functional and procedural aspects of the recognition committee utilizing guidance from staff input and corporate best-practice research.	By Q2	n/a

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>g. Strengthened Internal Communication Strategies</p>	<p>Expand internal distribution of the Employee Impact+ internal newsletter to mobile device delivery.</p> <p>Pilot internal digital signboards systems to display key internal messages at strategic locations throughout worksites to further enhance District-wide internal communication and awareness.</p>	<p>By Q4</p> <p>By Q3</p>	<p>n/a</p> <p>Budgeted</p>
<p>h. Employee Engagement and Organizational Improvement</p>	<p>Continue to build on the internal engagement initiatives the RIPPLE committee launched and identified in Year 1.</p>	<p>Ongoing</p>	<p>Budgeted</p>
<p>i. Workplace Safety</p>	<p>Continue to identify safety programs with room for improvement through policy assessment and evaluation of our practices. Ensure staff is adequately trained on the details of our updated written safety programs.</p> <p>Train District staff with a designated role in the EOC and ICS Organizational Structure; fine tune the process for communicating with employees during crisis; conduct an EOC-activation drill from the moment an incident occurs through the completion of an initial Incident Action Plan.</p>	<p>Ongoing</p> <p>End of Q1 & Q3</p>	<p>N/A</p>
<p>j. Work Facilities Assessment and Evaluation</p>	<p>Captured in Goal 2, Obj. 1d</p>	<p>---</p>	<p>---</p>
<p>k. Staffing Assessment</p>	<p>Develop District-wide list of internal resource gaps and present it to the Board as part of the two-year budget process.</p>	<p>By Q1</p>	<p>TBD</p>

Goal 5 - Objective 2: Customer Experience

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

- ✓ a. Perform an accessibility audit of the District's public facilities, customer programs, and outreach resources to identify and implement modifications that improve access for all customers.
- ✓ b. Deploy internal protocols and tools to strengthen key messaging and visual brand identity to ensure consistency through every customer interaction throughout the organization.
- ✓ c. 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.
- ✓ d. 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.
- ✓ e. Broaden customer awareness of our service value and 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.
- ✓ f. 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.
- ✓ g. Bolster community engagement with the municipalities located within the District's service area to strengthen support from partner agencies for the important work of the District.

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>a. Facilities, Programs, Outreach Accessibility Audit</p>	<p>Incorporate first phase of identified ADA website accessibility enhancements into implementation of District’s website CMS migration project.</p>	<p>By Q2</p>	<p>Budgeted</p>
<p>b. Key Messaging and Visual Brand Identity</p>	<p>Develop new engaging outreach booth displays for use at community events, and new indoor facility signage for the customer counter at the Administration Building and the visitor counter area at the Watershed Sky Oaks Office.</p> <p>Update the District’s Communications and Branding Guidelines and work with all teams to ensure its successful incorporation into various District activities and functions.</p>	<p>By Q2</p> <p>By Q1</p>	<p>Budgeted</p> <p>n/a</p>
<p>c. Geo-targeted Customer Communications</p>	<p>Research, evaluate and select cost-effective platform that provides geo-targeted call and SMS capabilities and prepare system for public launch including developing template messaging, trainings for staff users, and outreach to explain its roll out.</p>	<p>By Q4</p>	<p>Budgeted</p>
<p>d. Data-Driven Targeted Water Efficiency Outreach Campaigns</p>	<p>Implement seasonal water efficiency campaigns that target higher water users, including development of a new campaign to highlight the one-time increased turf rebate.</p> <p>Support the pilot AMI deployment effort.</p>	<p>Ongoing; New turf rebate campaign by Q2</p>	<p>Budgeted</p> <p>Budgeted</p>

5-YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
<p>e. Creative Storytelling Campaigns and Techniques for Priorities and Initiatives</p>	<p>Utilize drone imagery, visual assets and creative writing in new ways to help show and tell to customers the district’s major investments in our water system on CIP projects, including Pine Mountain Tanks, Lagunitas Creek Habitat Enhancements, large pipeline replacements, water supply roadmap work, and vegetation management/forest restoration activities.</p>	<p>Ongoing</p>	<p>Budgeted</p>
<p>f. School Open Houses, Field Trips, Virtual Tours and Curricula</p>	<p>Connect youth with water education through continued focus on the district’s classroom presentation offerings, water walks on the watershed, and ZunZun Musical Watershed assemblies.</p>	<p>Ongoing</p>	<p>Budgeted</p>
<p>g. Engagement with Local Municipalities</p>	<p>Develop schedule of engagement opportunities at town/city council meetings; coordinate/ provide District updates at a different council meeting once per quarter.</p>	<p>By Q2</p>	<p>n/a</p>

Goal 5 - Objective 3: Industry Engagement, Growth, and Leadership

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

- ✓ a. 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.
- ✓ b. 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.
- ✓ c. Continue to build collaboration and communication with other water districts, key government agencies, stewardship networks, and stakeholder organizations.

5 YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Industry Associations	Captured in Goal 2, Obj. 4c	---	---
b. Professional Development Opportunities	Encourage staff at all levels to engage in relevant professional associations through submittal of abstracts, joining committees, and other similar types of engagement.	Ongoing	---
c. Stakeholder Collaboration and Communication	Develop stakeholder list and identify key contacts to connect with for ongoing relationship building and communications.	By Q1	---
	Continue building working relationships with Federated Indians of Graton Rancheria.	Ongoing	

Goal 5 - Objective 4: Technology, Innovation & Process Improvements

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

- ✓ a. Develop and roll out a modern, secure intranet that will provide effective information exchange and collaboration among departments and teams.
- ✓ b. Provide an employee self-service function for accessing payroll, timekeeping, and other administrative functions.
- ✓ c. Create a program that fosters and incentivizes staff to identify, suggest, and use modern processes and technologies to improve workplace efficiency.
- ✓ d. Partner with academic institutions to research and solve the most pressing challenges for Marin Water and the water industry and support the use of the watershed as a research ground for academia, when appropriate.
- ✓ e. Strengthen succession planning by identifying and addressing gaps in documented standard operating procedures (SOPs) and ensuring an overlap of training for key positions.
- ✓ f. Begin conversion to advanced metering infrastructure (AMI) across the service area and develop and launch the associated customer portal to increase customer awareness of water use.
- ✓ g. 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.
- ✓ h. Replace the online customer bill pay system with a new system that improves self-service options for customers.

5 YR ACTION ITEMS	STRATEGIC ELEMENTS PLANNED IN YEAR 2	MILESTONE	W/N BUDGET OR FUNDS NEEDED
a. Intranet	Implement Microsoft M365 services throughout District and utilize included SharePoint Online application to build intranet site, including migration of files from legacy solution to cloud-based document store.	M365 by Q2 ; Intranet by Q4	Budgeted
b. Employee Self-Service Function	Implement an employee-centric services portal administered by HR and Payroll which is part of the District’s Enterprise Resource Planning (ERP) modernization effort.	By Q4	Budgeted
c. Workplace process/ Tech Efficiency Improvement Program	Incorporating into Goal 5, Objective 1f.	---	---
d. Academia Partnerships	Assess and report to the Board on continued engagement with Isle Utilities, which the District joined as a piloting member in 2024.	Ongoing	Budgeted
e. Succession Planning Through Documented SOPs/Training Overlap	Captured in Goal 2, Obj. 4b	---	---
f. AMI Conversion and Associated Customer Portal	Captured in Goal 1, Obj. 1c	---	---
g. SAP Selection, Implementation & Operational Integration	Implement the initial implementation efforts for the District’s Enterprise Resource Planning (ERP) modernization effort (Payroll and HCM).	Kickoff Q1; Complete Q1 2026	Budgeted
h. Online Customer Bill Pay System Replacement	Implement District/customer transition to new online bill pay system.	By Q2	Budgeted