



2026 Strategic Annual Work Plan

December 1, 2025



Goal 1 - Objective 1: Reduce Potable Water Use

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
	Continue implementation of 5-Year Water Efficiency Master Plan action items	Ongoing	Budgeted
a. Water Efficiency Concepts and Strategies Toward Short and Long-Term Goals	Track and analyze water use by sector to guide WEMP implementation strategy	Ongoing	Budgeted
	AMI – Hardware/Vendor Selection	Q2	Budgeted
	AMI – Initial Implementation	Q4	TBD by selection process
b. Water Efficiency Incentives, Education and Outreach	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
	Implement and award the High School Video contest.	Q2	Budgeted
	Targeted promotion of turf conversion programs to non-functional turf sites in alignment with the State's NFT prohibition for public agencies and local governments	Ongoing	Budgeted

Goal 1 - Objective 1: Reduce Potable Water Use (continued)

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
c. Implementation Of Water Loss Control and Leak Detection Program Recommendations	Evaluate new technologies to reduce water loss in the water distribution system. Pilot technologies that are deemed feasible.	Ongoing	Budgeted
	Participate in the Water Research Foundation Residential End Uses of Water Study	Q3	
d. Industry Association Participation	Participate in Water Research Foundation's (WRF) CA Indoor Residential Water Use Study	Q4	Budgeted
	Staff participation in DWR's SB1157 Indoor Water Use Working Group – this working group will utilize the WRF Water Use Study (referenced above)	Q4 2028	
e. Partnerships	Continue collaboration with MWPA and Firesafe Marin to maintain alignment in firesafe and water smart landscape programs	Ongoing	Budgeted
f. Policy Review	Evaluate District policies that will need refinement to align with AMI deployment	Q4	Budgeted

Goal 1 - Objective 2: Augment Existing Supply

5-YR ACTION ITEMS		WORK PLANNED IN YEAR 3		MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Roadmap Short-Term Actions	1.	Reduce water use and waste by 800 AF	1.	Ongoing	1. Budgeted
	2.	Continue stream release automation monitoring	2.	Ongoing	2. Budgeted
	3.	Phoenix to BTTP	3.	Nothing Planned	3. Budgeted
	4.	Soulajule PS Electrification Design	4.	Q4	4. Budgeted
	5.	Optimization of Sonoma Water Supply	5.	Q3	5. Budgeted
b. Roadmap Medium Term Projects and Longer-Term Goal Update	ARC focused:				
	1.	Develop Basis of Design Report for ARC Project	1.	Q1	1. Budgeted
	2.	Issue CEQA NOP to support environmental documentation processes	2.	Q1	2. Budgeted
	3.	Prepare Initial Draft of EIR document	3.	By Q3/Q4	3. Budgeted
	4.	90% Engineering Plans	4.	Q4	4. Budgeted
	5.	Ongoing Stakeholder collaboration and engagement with project as design progresses	5.	Ongoing	5. Budgeted

Goal 1 - Objective 3: Preserve and Enhance Existing Partnerships

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Recycled Water Project Partnerships	Continue to work with Northbay Water Reuse Authority and local sanitary agencies	Ongoing	Budgeted
b. Sonoma Water Agreement Renewal	COMPLETE – Agreement approved Oct. 2025	COMPLETE	---
c. Relationship Building for Regional Water Supply Projects	Work with Sonoma Water and contractors to continue implement NERF	Ongoing	Budgeted
	Work with Sonoma Water and contractors to continue building support for ARC	Ongoing	Budgeted
d. State And Federal Support for Regional Supply Development	Identify and apply for grant funding for water supply projects	Ongoing	Budgeted

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

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Reservoir Management Plans	Develop approach for Halleck and Nicasio creeks	Q3	Funds Needed
b. Water Treatment Option Improvements	Implement Liquid Ammonium Sulfate project	Q2	Budgeted
	Review of primary disinfection practices to improve efficiencies	Q1	Budgeted
c. Water Quality Lab	COMPLETE – TNI accreditation standard for compliance analyses (2024); Refocus of Lab resources to distribution system and reservoir management (2025)	COMPLETE	---
d. Water Quality After Wildfires/ Industry Lessons Learned	Develop summary of wildfire impacts to Water Quality in surface water reservoirs and impacts to treatment of water	Q2	Budgeted
e. Regulation Development	Continue to monitor for proposed and upcoming regulations	Ongoing	Budgeted

Goal 2 - Objective 1: Infrastructure Condition Assessment

5-YR ACTION ITEM	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Above Ground Facility Assessment	COMPLETE - Findings incorporated into Goal 1, Obj. h.	COMPLETE	---
b. Pipeline Replacement Project Prioritization Process Review	COMPLETE - Presented to Board with Water System Master Plan Jan. 2025.	COMPLETE	---
c. Large infrastructure condition assessments (dams & treatment plants)	Begin risk assessment for dams. Execute contract to begin development of water treatment plant master plan.	Q1 Q1	Budgeted
d. Workplace Facilities Plan	Develop a design concept to address facility needs for District consideration; complete assessment of Sky Oaks facilities.	By Q3	Budget modifications needed
e. Above-ground Infrastructure Hardening	COMPLETE - findings incorporated into item 1.h.	COMPLETE	---
f. Water System Single Points of Failure Assessment/CIP Incorporation	Continue efforts to identify single points of failure to support prioritization of CIP work.	Ongoing	Budgeted
g. Water System Security Measures	Begin development of facility security standards to be incorporated into future project prioritization – consider site security needs identified in Goal/obj 1a as part of process.	Q2	Budgeted
h. Water System Master Plan	COMPLETE – Continue implementing capital project prioritization informed by the Water System Master Plan, maintaining this as an ongoing effort to guide future capital planning.	COMPLETE/ Ongoing	---

Goal 2 - Objective 2: Capital Planning

5-YR ACTION ITEM	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Planning with Infrastructure Condition Assessment/Other Data	Use data from Objective 1 to identify large capital projects for 10-year prioritization, incorporate findings from the Treatment Plant Master Plan and Dam Condition Assessment into 30-year plan.	Begin in Q4	Budgeted
b. Project Grant Opportunities	Continue to identify grant funding opportunities that are a good fit for the various District capital projects – focusing on California funding opportunities.	Ongoing	Budgeted
c. Bond Funding Opportunities for Generational Projects	Captured in Goal 4, Objective 4b.	--	--

Goal 2 - Objective 3: Capital Project Delivery

5-YR ACTION ITEM	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Resource Needs Assessment	COMPLETE – leveraged several position conversions to create 4 new positions; resource needs to be evaluated on an ongoing basis.	COMPLETE/ Ongoing	---
b. On-Call Contracts for Expedited Small Repairs	COMPLETE – on-call construction contracts in place to expedite small capital work; will continue to leverage such contracts into the future in support of the capital program.	COMPLETE/ Ongoing	---
c. On-Call Engineering Firm Consulting Contracts	COMPLETE – executed on-call geotechnical and civil engineering design services contract to streamline workflow and productivity.	COMPLETE/ Ongoing	Budgeted
d. District Contract Specifications Update	Update District contract specifications to most current Construction Institute Master format.	Begin in Q2	N/A
e. Design Build for Larger Capital Projects and other innovative approaches to project implementation	Explore design build delivery methods for the Admin Building facility workspace project.	Begin in Q3.	TBD
f. Paving Restoration Requirements	Continue discussions and negotiations with other municipalities building on momentum from initial work with County and a few local municipalities that have resulted in less costly paving restoration requirements on various pipeline projects.	Ongoing	N/A

Goal 2 - Objective 4: Operations and Maintenance

5-YR ACTION ITEM	WORK PLANNED IN YEAR 3	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 and/or develop 5-10 SOPs this year.	Finish in Q4 2026	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.	Ongoing	Budgeted
d. Operations Organizational Structure Review	Continue to 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 workflows.	Ongoing	Budgeted

Goal 2 - Objective 5: Energy Planning

5-YR ACTION ITEM	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Fleet Regulatory Compliance	Develop design scope of work based on the electrical load study to solicit proposals for the design of electrical vehicle charging stations at the Administration, Corp Yard and Sky Oaks facilities.	By Q1	Budgeted
b. Pump Station Evaluation for Alternative Energy Use	Continue to evaluate feasibility of integrating solar with pump station rehabilitation projects as staff develops pump station prioritization for next budget cycle.	Ongoing	N/A
c. Carbon Neutrality	Continue compiling results from the benchmarking study conducted with other local water agencies to evaluate respective carbon neutral policies. Prepare findings for discussion with Board in Q1.	Ongoing	N/A
d. Micro-Turbine Technology	COMPLETE - conducted assessment of the system for use of this technology and provided an update to the Board July 2024 – presented findings at AWWA conference in June 2025.	COMPLETE	N/A
e. Renewable Power Opportunities	Complete structural assessment of the San Geronimo Treatment Plant clarifiers and roof, identified as ideal candidates for solar installation, and develop structural modification recommendations.	By Q2	Budget modification needed

Goal 2 - Objective 6: Emergency Response Readiness

5-YR ACTION ITEM	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Emergency Response Plan Update	Develop Emergency Response Procedures designed to be concise, focused documents that detail initial objectives, actions, and priorities for specific hazards that could impact District facilities and operations.	Ongoing	TBD
b. Annual EOC tabletop Exercises	Update EOC to reflect the changes made to our current staff. Train individuals with a new role in the EOC as to their responsibilities. Train staff by holding an internal Dam Failure Tabletop exercise to activate our EOC and complete the initial response to a threat.	Q4	Budgeted
c. Dam EAP Review and Tabletop Exercises	Develop detailed table-top simulation for joint exercise with Marin County OEM, DSOD and local jurisdictions.	By Q4	Budgeted
d. Emergency preparedness training with Marin County OEM	Continue participation in monthly Marin County OEM meetings. Coordinate a tabletop exercise related to our Dam EAP at Marin OEM HQ. Put District staff members through AlertMarin "Requester Training" which will allow designated District employees to request AlertMarin emergency notifications for incidents that effect large segments of the public.	Q2	Budgeted
e. FEMA-compliant Contracts for Disaster Recovery Needs	Staffing workloads have caused this item to slip from completion in CY25 to CY26. The contract templates will allow the District to quickly procure resources to respond during emergencies.	Completed by Q2	N/A
f. Risk Reduction Assessments	Continue conducting single point of failure assessments as outlined in Objective 1.f, and advance projects addressing fire hardening and security measures.	Q4	Budget modifications needed

Goal 3 - Objective 1: Creek Restoration

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Lagunitas Creek Restoration	Finish construction of Phase 1B Site 3.	Q3	Budgeted
	Complete design work for Phase 2 sites.		
b. Lagunitas Creek Stewardship Plan	Complete annual fisheries lifecycle monitoring and habitat enhancement effectiveness monitoring.	Ongoing	Budgeted
	Begin update to the Lagunitas Creek Stewardship Plan.	Q1	
c. PIT Program	Advance gravel augmentation PIT Tag monitoring in Lagunitas Creek. Continue operations of new PIT Tag antennae to support long-term fisheries monitoring work.	Q4	N/A
d. Apply technical expertise to regional restoration projects	Continue to support Lag Creek TAC, participate in technical conferences, and share out annual monitoring work through reports and technical studies.	Ongoing	N/A

Goal 3 - Objective 2: Watershed Resiliency to Wildfire

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Public Safety Partnerships	Support Marin County Search and Rescue watershed training events. Inter-agency wildfire trainings, and defensive tactics training with Marin County Sheriff.	Q4	N/A
b. Biodiversity, Fires, and Fuels Integrated Plan	<p>Complete BFFIP priorities to achieve 1,800 acres of vegetation management and forest restoration projects. Complete environmental compliance and associated long-term monitoring.</p> <p>Advance burn plans to support implementation of prescribed fire on the watershed. Continue building local partnerships with Marin County Fire and other public land agencies to support implementation.</p>	Q4	Budgeted
c. Strategic Partnership for Regional Resiliency	Participate in Community Wildfire Protection Plan (CWPP) update. Participate in Marin Wildfire Prevention Authority and Fire Safe Marin.	Q4	N/A
d. Workforce Development	Establish trail and fuel reduction contracts with California Conservation Corps and California Conservation Corps North Bay. Apply and host AmeriCorps members from Watershed Stewardship Program.	Q4	Budgeted
e. Wildland Firefighting and Vegetation Equipment	Work with One Tam and Marin County Fire on a prescribed fire resources equipment cache to support implementation activities on public lands.	Q4	Budgeted

Goal 3 - Objective 3: Stewardship

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Annual Biological Monitoring	BFFIP biological compliance work to support implementation. Roads and Trails Management studies to inform update. Conduct Lagunitas Creek Fisheries annual life-cycle monitoring work.	By Q4	Budgeted
b. Regional Partnerships	Approve One Tam Annual Work Plan. Secure grant funding to advance One Tam Forest Resiliency Strategy. Participate in TOGETHER Bay Area and Golden Gate Biosphere Network working groups. Engage with Federated Indians of Graton Rancheria as part of One Tam collaboration and on CEQA project review.	Q4	N/A
c. Regional Restoration Opportunities	Develop watershed restoration priorities as part of the RTMP update.	Q3	N/A
d. Stewardship Programs	Continue advancing the Districts established volunteer programs to support community engagement in watershed stewardship. Trail maintenance contract to support monthly trail volunteer events.	Q4	Budgeted
e. Natural Resources Interpretation	Host One Tam community science activities. Engage visitors in natural resources interpretation events.	Q4	Budgeted

Goal 3 - Objective 4: Recreation

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Watershed Rec Mgmt Planning Feasibility Study	COMPLETE – implementing various "opportunity areas" identified in study	COMPLETE	---
b. Azalea Hill Trail Restoration Project	Develop parking lot and trail head design; decommission social trails; implement hiking trail improvements.	Q4	Budgeted
c. Evaluate Priority Roads and Trails	Continue implementation of E-Bike Pilot Program and associated data collection.	Q4	Budgeted
d. Nature-based Self-guided Tours and Outreach Materials	Promote forest resiliency self-guided hikes to education visitors about the benefits of watershed stewardship and wildfire risk reduction activities.	Q4	Budgeted

Goal 3 - Objective 5: Facilities

5-YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Roads and Trails Management Plan	Develop draft RTMP. Host community site visits to inform plan updates.	Q3	N/A
b. Integrate Watershed Facilities into Master Planning Process	Conduct Sky Oaks facilities assessment. See Master Planning section.	Q4	N/A
c. Watershed Housing	Evaluate workforce housing as part of Sky Oaks facilities assessment.	Q4	N/A

Goal 4 - Objective 1: Financial Stability

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Stabilization Reserves	COMPLETE – Board approved revisions and additions to the District's Reserve Policy (#46) in 2023 and 2025. The revisions help define the purpose and targets for each reserve fund. Additional funds were added for Water Supply Projects and Facility Replacement	COMPLETE	---
b. Long-Term Capital Improvement Program with Stable Investments	As part of developing the financial plan for rate setting in 2027, Finance and Engineering will work to refine long-term capital cost estimates and District-wide prioritization.	Q3	Budgeted
c. Non-Rate Revenue Updates	Review non-rate revenues as part of the initial rate-setting process.	Q3	Budgeted

Goal 4 - Objective 2: Fair, Equitable, and Proportional Rates

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Connection Fee Study	COMPLETE – Board approved updated Capacity Charge methodology effective July 2025	COMPLETE	---
b. Low-Income Program Evaluation	As part of the rate setting process, staff will determine whether modifications to the criteria for low-income discount programs are appropriate.	Q4	Budgeted
c. Rate Setting	As part of the 2027 rate setting process, select an independent consultant to perform the Cost of Service Analysis (COSA)	Q2	Budgeted
d. Robust rate setting outreach plan	No work planned in 2026 (will begin 2027).	---	---

Goal 4 – Objective 3: Cost-Effective Business Practices

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. SAP Update to Streamline Processes and Improve Analytics	Develop Payroll and HR modules by Q2; publish RFP for customer billing by Q2; award contract to Systems Integrator by Q3; Work with independent consultant to develop RFP for Asset Management and Finance Modules in Q4.	Multiple Milestones	Budgeted
b. Leverage External Resources for Efficiency	COMPLETE – see Goal 2, Obj 3b and 3c.	COMPLETE/ Ongoing	---
c. AA or Better Credit Quality Rating	COMPLETE – Fitch upgraded credit rating to AA+ in 2025	COMPLETE / Ongoing	Budgeted
d. Online & Electronic Bill Payments	COMPLETE – Transitioned to new system in 2025.	COMPLETE	---
e. Streamline the Application Process for Discount Programs and Leak Adjustments	COMPLETE – application process has been streamlined. Staff will consider future modifications to the leak adjustment criteria in late-2026 as part of the AMI project	COMPLETE/ Develop recommendations for leak adjustment criteria by Q4	---

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

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. WRDA Funding for Water Supply Projects	Advocate for USACE funding for Marin Water WRDA projects.	Ongoing	---
b. Bond funding for infrastructure	No work planned in year 3. To be pursued in 2027 at the earliest.	---	---
c. State and Federal Grants	Respond to California Prop. 4 funding solicitations for District Projects. Secure Wildlife Conservation Board Grant for Lagunitas Creek Phase 2.	Ongoing	---
d. WIFIA Program loans for longer-term construction cycles	COMPLETE – Staff evaluated and pursued this option in previous years and ultimately determined it was not a good fit for the District.	COMPLETE	---
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	---

Goal 4 – Objective 5: Financial Transparency

5 YR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Online Customer Tool Improvements	COMPLETE	COMPLETE	---
b. Bi-annual fiscal policies review	COMPLETE	COMPLETE	---
c. Quarterly Financial Summary Publication	COMPLETE	COMPLETE	---
d. Regular Internal and External Financial Audits	COMPLETE	COMPLETE	---
e. Proactive Customer Communications for Grants and Investments in Key Priorities	COMPLETE	COMPLETE	---

Goal 5 - Objective 1: Organizational Culture and Values

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Recruitment Collateral	Redesign the District employment website landing page to add features that improve navigation, showcase District accomplishments and provide a sense of workplace culture.	By Q2	Budgeted
b. Recruitment Partnerships with local Community Orgs, Colleges, Trade Schools	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.	ongoing	N/A
	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. Attend community career fairs as available.	ongoing	
c. Welcoming Onboarding Process	Completed – new onboarding process was developed and rolled out; process will continue to be utilized for new employees and fine-tuned, as needed.	COMPLETE / ongoing	---
d. Diversity, Equity and Inclusion Training	Completed - All existing employees went through training and training is integrated into the onboarding process for new employees.	COMPLETE/ ongoing	---

Goal 5 - Objective 1: Organizational Culture and Values (continued)

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Employee Training Program	Implement training program as outlined in the annual employee training work plan. Training will cover soft skills training (example: customer service), leadership training, management training AND some technical training including data security training and trainings for new IT tools to be rolled out Districtwide (examples: M365, SAP and support for technical training for specific departments and classifications).	Q1 – Q4	Budgeted
	Continue manager and supervisor participation in leadership academy as a baseline training.	COMPLETE/ Ongoing	
	Continue to offer learning aid sessions on interviewing techniques to support employees seeking internal promotions.	COMPLETE/ Ongoing	
f. Employee Recognition and Appreciation Programs	Implement a refresh of the employee recognition awards, aligning with current District values, utilizing staff input, and in consideration of outside best practice research.	By Q2	Budgeted

Goal 5 - Objective 1: Organizational Culture and Values (continued)

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
g. Strengthened Internal Communication Strategies	Pilot internal digital signboards systems to display key internal messages at strategic locations throughout worksites to further enhance District-wide internal communication and awareness.	Complete by Q4	Budgeted
h. Employee Engagement and Organizational Improvement	Prepare a workplan for new initiatives to continue supporting positive employee engagement.	By Q3	Budgeted
i. Workplace Safety	Continue implementing modernized safety program by integrating new safety trainings. Prioritize updating the Lone Worker Program. Convene quarterly Workplace Safety Committee Meetings.	Ongoing	Budgeted
j. Work Facilities Assessment and Evaluation	Host an evacuation drill at each of our District facilities. Captured in Goal 2, Obj. 1d	Q1 & Q3 ---	Budgeted ---
k. Staffing Assessment	Fold into the next rate-setting process.	Begin Q3	TBD

Goal 5 - Objective 2: Customer Experience

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Facilities, Programs, Outreach Accessibility Audit	Initiate RFP to select consultant for accessibility audit; implement audit of facilities, programs and website to inform of action items and next steps.	Audit report to Board by Q4	TBD
b. Key Messaging and Visual Brand Identity	Develop new indoor facility signage for the customer counter at the Administration Building and the visitor counter area at the Watershed Sky Oaks Office.		Budgeted
c. Geo-targeted Customer Communications	Nothing planned in Year 3.	---	---
d. Data-Driven Targeted Water Efficiency Outreach Campaigns	Continue to implement seasonal efficiency campaigns that target higher water users. Support the pilot AMI deployment effort.	Ongoing Q3/Q4 (aligned w/program rollout)	Budgeted

Goal 5 - Objective 2: Customer Experience

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
e. Creative Storytelling Campaigns and Techniques for Priorities and Initiatives	Continue to 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, water supply roadmap work, and vegetation management/forest restoration activities.	Ongoing	Budgeted
f. School Open Houses, Field Trips, Virtual Tours and Curricula	COMPLETE – launched revamped program in summer of 2025 with robust outreach effort and will be evaluating success of inaugural program year for future refinements.	COMPLETE/ Ongoing	---
g. Engagement with Local Municipalities	Nothing planned for year 3.	---	---

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

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Industry Associations	Captured in Goal 2, Obj. 4c	---	---
b. Professional Development Opportunities	Submit a minimum of three abstracts District-wide to professional industry associations.	By end of Q4	---
c. Stakeholder Collaboration and Communication	Implement robust, project-focused stakeholder engagement for the District's Roads & Trails Management Plan and the Atmospheric River Capture Project.	Ongoing	Budgeted

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

5-YEAR ACTION ITEMS	WORK PLANNED IN YEAR 3	MILESTONE	W/IN BUDGET OR FUNDS NEEDED
a. Intranet	Develop District-wide and Division-specific Sharepoint and Teams sites within the M365 platform	Q1	Budgeted
b. Employee Self-Service Function	Launch Employee Self Service for HR and Payroll modules.	Q2	Budgeted
c. Workplace process/ Efficiency Improvement Program	Incorporated into Goal 5, Obj. 1f.	---	---
d. Academia Partnerships	Continue participation in CW3E, part of the Scripps Institute of Oceanography at UCSD. Engage in innovation activities with water technology businesses that are offered through the District's new membership with Imagine H2O.	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	Complete HR and Payroll Modules of SAP. Publish RFP and select a System Integrator to upgrade SAP modules for Customer Service and Billing.	Q1 Q3	Budgeted
h. Online Customer Bill Pay System Replacement	Complete – transitioned in 2025.	COMPLETE	---