Yorba Linda Water District

STRATEGIC PLAN

2024

PFAS Treatment Plant

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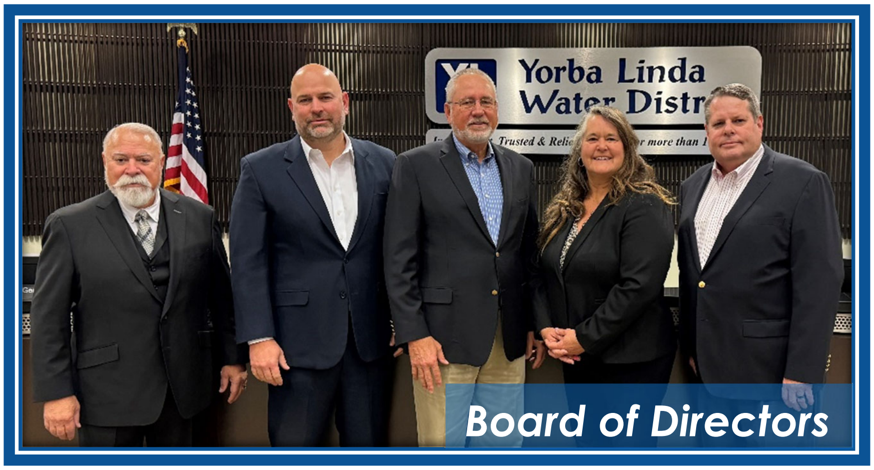
INTRODUCTION

The Yorba Linda Water District is an independent special district serving over 80,000 people with 26,000 customer connections within the City of Yorba Linda and portions of Placentia, Brea, Anaheim, and unincorporated Orange County. In addition to supplying water to a predominantly residential community, the District is also responsible for maintaining wastewater collection systems in its service area.

The District is met with many challenges including uncertain State mandates/regulations, water supply and water quality issues, environmental pressures, regulatory mandates on conservation, infrastructure maintenance and upgrades, rising operational costs, and the ability to recruit and retain a high-performing workforce. This strategic plan serves as a roadmap for how the District will respond to these challenges and optimize the equitable use of water to continually adapt in changing environments. It reinforces our vision, mission, and guiding principles, as a special district committed to providing high-quality water and wastewater to our customers.



Board of Directors

Strategic planning is a disciplined effort to produce fundamental decisions and actions that shape and guide an organization, what it does, and why. The Strategic Plan is created through a comprehensive process that includes the Directors, executive management, staff members, and the public. This results in the creation of a plan applicable to all positions within the organization, and to empower exceptional and effective public service. The plan will then be integrated into the budgetary process to ensure that resources are properly allocated to achieve the goals, initiatives, and strategies set forth in this plan.

Yorba Linda Water District's dedication to its customers, fiscal responsibility, reliable water, and workforce is clearly displayed within the goals incorporated in this strategic plan.

DISTRICT PROFILE

MISSION

Yorba Linda Water District (YLWD) provides reliable water and sewer services to protect public health and the environment with financial integrity and superior customer service.

VISION

Yorba Linda Water District will accomplish our mission to improve the quality of life for those we serve by: Embracing proven technology, improving customer satisfaction, providing efficient and responsive operations, ensuring reliable infrastructure, and assuring fiscal accuracy and transparency.

CORE VALUES

INTEGRITY

ACCOUNTABILITY

RESPONSIBILITY

TRANSPARENCY

RESPECT

TEAMWORK

STRATEGIC PLAN FRAMEWORK

The Strategic Plan identifies five main goals for the District to address. Each goal has its own set of initiatives and strategies that would lead to successful accomplishment.

The Strategic Plan will be assessed annually and updated accordingly.

Goals

Effectively addressing challenges and opportunities for improvement that align with the District's core values, and further its mission and vision.

Initiatives

High-level concepts or plans for accomplishing the identified goals.

Strategies

Action steps for achieving the identified initiatives and the identified goals.

The following five goals were identified as the District's top priorities:

Goal 1: Safe & Reliable Water and Sewer Services

Goal 2: Fiscal Responsibility

Goal 3: Operational Effectiveness

Goal 4: Community Partnerships

Goal 5: Workforce Engagement

GOAL 1

Safe & Reliable Water and Sewer Services

The ultimate mission is to provide safe and reliable vital services to the public. Our goal is to operate and maintain all water and wastewater assets for reliable delivery of District services. Effective management of assets involves monitoring the condition of assets and associated risks of failure, planning for future needs, and anticipating uncertainties or changing levels of service.

Initiative 1: Water Supply

A. *Evaluate groundwater supplies by maximizing groundwater utilization and developing additional well sites and sources.*

B. *Evaluate other water supplies by reviewing raw water usage with Municipal Water District of Orange County (MWDOC) and review/update interconnection agreements.*

Initiative 2: Regulations/Legislation

A. *Comply with all regulatory requirements (e.g. water quality, environmental, backflow).*

B. *Monitor emerging water and wastewater legislation.*

C. *Meet with lobbyists, representatives, and regulators at all levels (local/State/Federal).*

D. *Take on leadership role with industry committees.*

Initiative 3: System Reliability and Efficiency

A. *Develop/Implement Capital Improvement Program (CIP).*

B. *Utilize plans and tools to target infrastructure operations, maintenance, and upgrades.*

Initiative 4: Security/Aesthetics

A. *Develop District standards for public facing aesthetics.*

B. *Identify and support the installation of backup systems, fire hardening, security, cybersecurity, and redundancy.*

GOAL 1

Safe & Reliable Water and Sewer Services

Initiative 5: Services/Partnerships

A. *Evaluate feasibility of providing additional water services within the region.*

B. *Evaluate feasibility of providing additional wastewater services within the region (e.g. septic to sewer).*


PFAS Treatment Plant

GOAL 2

Fiscal Responsibility

The District strives to maintain financial oversight of all District funds by ensuring conformance with a clear, well-documented budget process and annual financial audit. The District holds paramount its duty to demonstrate effective and responsible use of public funds while responding to ever-increasing financial challenges such as inflation and rising costs of goods and services.

Initiative 1: Fiduciary Responsibility

A. *Maintain Government Finance Officers Association (GFOA) Award Recognition for the Annual Comprehensive Financial Report (ACFR), Popular Annual Financial Report (PAFR), and Annual Operating Budget.*

B. *Maintain Fitch and Standard & Poor's bond rating of AA+ or higher.*

C. *Annually evaluate and update as necessary, the District's financial plan and policies to incorporate the District's Water/Sewer Master Plans (WMP/SMP) and Asset Management Plan (AMP), and ensure that reserves and paydown of unfunded accrued liabilities (UAL) are adequately funded.*

D. *Review existing service contracts as appropriate for cost efficiencies.*

E. *Manage cash flow to maximize investment income.*

F. *Ensure compliance with state and federal grant funding requirements.*

Initiative 2: Financial Transparency

A. *Provide all pertinent financial documents and policies on the District's website.*

B. *Maintain California Special District Association's (CSDA) Certificate of Transparency to demonstrate the District's commitment to operating in a transparent and ethical manner.*

GOAL 2

Fiscal Responsibility

Initiative 3: Balanced Budget and Equitable Rates

A. *Perform cost of service analysis periodically and appropriately to ensure rates and charges are fair and equitable, including compliance with Proposition 218 requirements.*
B. *Update rate models as part of the budget process and review and adopt an appropriate fee schedule annually.*
C. *Develop an annual budget for Board approval for subsequent fiscal year.*

GOAL 3

Operational Effectiveness

The District has provided reliable and trusted service for more than one hundred years. It recognizes the importance of continual improvements to increase operational effectiveness. The District has established a comprehensive internal control framework that is designed both to protect the District's assets from loss, theft, misuse, and to compile sufficient, reliable information for the preparation of the District's financial statements.

Initiative 1: Efficiency

A. *Optimize use of existing technologies (e.g. Computerized Maintenance Management System, SCADA, Meter Reading AMR).*
B. *Explore non-traditional approaches to improve operational efficiencies, turbines, solar, rate evaluations for energy efficiency, TOU pumping.*
C. *Evaluate tools and equipment that can improve work performance, safety, and efficiencies (Hydro Excavators, Pipe cutting equipment, Mechanics shop tools and large equipment, vehicle design).*
D. *Continue to develop written departmental standard operating procedures.*

GOAL 3

Operational Effectiveness

Initiative 2: Sustainability

A. *Update Asset Management Plan, Water and Wastewater Master Plans as needed.*
B. *Address the District's future infrastructure needs.*
C. *Maintain industry recommended maintenance programs for District assets.*
D. *Evaluate and maintain sustainable operations.*
E. *Comply with all local, state and federal Water and Wastewater Regulations.*

Initiative 3: Emergency Preparedness

A. *Perform semi-annual Emergency Operations Center exercises.*
B. *Strengthen existing emergency operations.*
C. *Establish an Emergency Preparedness team with District staff.*

Timber Ridge Booster Pump

GOAL 4

Community Partnerships

As a public agency, the District is expected to demonstrate the prudent use of public funds. The District's services should provide tangible benefits that are of value to the community. Strengthening existing relationships with key stakeholders, including customers and agency partners, while demonstrating our dedication to transparency in the most professional manner, is paramount.

Initiative 1: Brand Recognition

A. *Provide timely communication, messaging, and strategies.*

B. *Host a YLWD Open House and/or infrastructure tours for our customers, community partners, and stakeholders to attend and learn about YLWD and the services we provide.*

C. *Offer partnership opportunities for community events, water donations, giveaways, etc.*

D. *Highlight YLWD on our social media platforms and website to humanize our organization and foster a stronger connection with our community.*

Initiative 2: Public Awareness & Engagement

A. *Frequently update the District website.*

B. *Publish annual reports and infographics; include water usage, cost, reconciliation, investments, projects, etc.*

C. *Utilize communication tools to promote YLWD services available using various methods to engage with more customers.*

D. *Communicate District News and emerging water quality and sewer issues/regulations using various communication methods to engage with more customers.*

Initiative 3: Local, State & Federal Engagements

A. *Actively maintain and work with local, state and federal organizations on emerging issues.*

GOAL 5

Workforce Engagement

The District prides itself on a highly-skilled staff of professionals that produce superior quality work through consistent application of established core values. Our employees are the foundation for everything we do. Building on employee engagement is critical to future success, and the recruitment and retention of a high-performing workforce. By providing a positive, innovative work environment, a variety of training and development opportunities, and the best possible facilities and equipment, our employees will successfully accomplish our mission.

Initiative 1: People

A. *Foster a positive, innovative organizational climate, recognizing the importance of employee health, wellness, and safety.*

B. *Establish and maintain an effective performance management program.*

C. *Recruit and retain a highly-skilled and capable workforce.*

Initiative 2: Training & Development

A. *Provide opportunities for training, cross-training and development at all levels of the organization, including leadership development, management and supervisor training.*

B. *Provide mentorship and internship programs.*

C. *Develop a comprehensive succession plan.*

Initiative 3: Facilities & Equipment

A. *Improve IT infrastructure for maximum efficiency, effectiveness, and security.*

B. *Maintain and/or upgrade facilities, as needed, to provide functional, positive, and safe workspaces.*

C. *Maintain and/or upgrade organizational equipment, as needed, to facilitate efficient and safe operations.*