Sweetwater Authority

STRATEGIC PLAN

2012
Reverse osmosis trains at the Richard A. Reynolds Groundwater Desalination Facility
strategic plan 2012

Governing Board
Ron Morrison, Chair
Margaret Cook Welsh, Vice Chair
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Jose Preciado
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PREPARED BY
Moore Iacofano Goltsman, Inc.
“Among the Stones”
Photo by Frances Aquino
Hilltop High School
Second Place Winner
2012 High School Photo Contest
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THE SWEETWATER RIVER DELIVERS WATER VIA THE 230-SQUARE MILE WATERSHED STRETCHING FROM THE CLEVELAND NATIONAL FOREST IN THE EAST TO THE SAN DIEGO BAY.
I. introduction

OVERVIEW OF SWEETWATER AUTHORITY

Sweetwater Authority (Authority) provides safe, reliable water service to approximately 184,000 people across a 32-square mile area in the South Bay region of San Diego County, California. The Authority’s customers are located in the unincorporated community of Bonita, the City of National City, and the western portions of the City of Chula Vista. This includes residential, business, government, industrial and agricultural water users, in an area covering more than 20,480 acres.

The Authority is a special district, joint powers water agency, with policies and procedures established by a seven-member Governing Board of Directors. Five directors are elected by the citizens of the South Bay Irrigation District (SBID) and two directors are appointed by the Mayor of National City, subject to City Council confirmation.

A Brief History

The elements of the Authority’s water sources and delivery system are rooted in a long history. In May 1869, the Kimball Brothers Water Company began service to 35 local residents with water drawn from wells and the Sweetwater River, followed by construction of the Sweetwater Dam and Reservoir in 1888. Significant population growth and urban development over the decades led to expansion of the system. Yet, as a privately-held entity, infrastructure maintenance and replacement favored maximizing profits rather than supporting the long-term integrity of the system.

Formed as a public agency in 1972, the Authority operated as a financing vehicle to
enable public acquisition of the water system from the California American Water Company. In 1977, the Authority began operating the water utility with 56 employees and a new focus on maintaining and strengthening the integrity of the water treatment and distribution system, including hundreds of miles of original (1888) pipe. At that time, a public vote approved authorization of bonds, the SBID purchased the system, and the Authority began operating the water utility with a commitment to retire the SBID debt and assume ownership. In 1990, the Authority financed and assumed ownership of the SBID water system by issuing revenue bonds.

Since taking over operations in 1977, the Authority reduced water main leaks from over 200 per year to less than 10 per year, improved water pressure, and developed new and unique local water supplies and supporting facilities. The Authority and its customers reap the benefits of local supply, with local water sources contributing 24 to 100 percent of the Authority’s annual water demands. Local surface water supply is highly variable depending on the amount of runoff from precipitation. Today, with a contingent of 135 employees, the Authority is empowered to acquire, own, operate, manage, maintain and improve its pioneering water system.

**Service Area Profile**

The Authority’s service area enjoys mild temperatures year-round with a characteristically semi-arid Mediterranean climate along the coast. The majority of the service area is within two miles of the San
Illustration of the 230-square mile Sweetwater River Watershed
Diego Bay, including the City of National City and the western and central portions of the City of Chula Vista. The Bonita area and the Authority’s two reservoirs are located farther inland, and experience slightly hotter summers and colder winters. More than 80 percent of the region’s rainfall occurs from December through March, with an average annual rainfall of 11.3 inches at the Sweetwater Reservoir.

The Authority’s customer base of approximately 184,000 residents include residential, business, government, industrial, and agricultural water users across urban, suburban, and rural areas. While conservation efforts in recent decades have reduced water demand, the service area population is projected to grow by 25 percent by 2035. Much of this growth is planned to occur in redeveloped urban core areas of Chula Vista and National City, converting predominantly commercial and retail uses to mixed-use and residential uses. Additionally, the vacant Chula Vista Bayfront is planned to become newly developed. Overall, while this growth will increase water demands, higher efficiency buildings and water-delivery elements (e.g., low-flow fixtures and landscaping) are projected to reduce per capita water usage, in an effort to minimize the impact of future demands.

**Water Supply Sources**

The Authority’s diversity of water supply sources and proportion of local resources provides it with a greater degree of local control for an agency of its size in Southern California. A range of sources contribute to the local supply of water.

**Sweetwater River**

The Sweetwater River delivers the majority of the Authority’s water, when local supplies are available, via the 230-square mile watershed stretching from the Cleveland National Forest in the east to the San Diego Bay.

**Sweetwater Reservoir**

Located in Spring Valley, Sweetwater Reservoir has a capacity of 28,079 acre feet. At the time of its completion in 1888, Sweetwater Dam was the country’s largest masonry arch dam. In recent decades, frequent safety inspections and modern upgrades have strengthened the dam’s integrity and lifespan well into the near future, contributing to its designation as a historical monument in 2006 by the American Society of Civil Engineers. While the reservoir area offers riding and hiking trails, and
shoreline fishing to the public, critical animal and plant species are also preserved through a habitat management program.

**Loveland Reservoir**
Loveland Reservoir, near Alpine, has a capacity of 25,400 acre feet. Its dam, completed in 1945, is 203 feet high and 765 feet wide. Loveland Reservoir serves as a holding area for water which is released into the Sweetwater Reservoir. Additionally, public fishing access is provided at the reservoir through a unique partnership and land swap with the U.S. Forest Service. Combined, the Authority’s two reservoirs (when full) can store 17 billion gallons of water, enough to supply the Authority’s customers for about 24 months.

**Groundwater**
Groundwater is pumped from the San Diego Formation at two locations. One is the National City Wells consisting of three wells that have produced an annual average of 1,810 acre-feet since 1954. The second location is the Richard A. Reynolds Groundwater Desalination Facility (Reynolds Facility) consisting of six wells that have produced an annual average of nearly 2,900 acre-feet since 1999, with the most recent fiscal year production being nearly 3,500 acre-feet. The Authority can pump and treat a combined total of nearly six million gallons of drinking water per day from this groundwater aquifer.

**Imported Water**
Thirty-four percent of the Authority’s water has been purchased from the San Diego County Water Authority (CWA) via the Metropolitan Water District of Southern California (MWD) for the 2011 fiscal year. Imported water is transported by massive aqueduct systems
I. Introduction

from the Colorado River, 242 miles away, or the State Water Project, which carries water about 700 miles from the Sierra-Nevada Mountains through the Sacramento-San Joaquin Bay Delta. The amount of imported water varies due to local rainfall, with higher than average amount resulting in no imported water needed. Comparatively, under normal conditions, most of the rest of San Diego County receives about 90 percent of its water from imported sources.

Facilities

In addition to owning the Sweetwater and Loveland Reservoirs, the Authority owns and operates facilities and infrastructure that support the water pumping, treatment and delivery processes.

Robert A. Perdue Water Treatment Plant

Located at the Sweetwater Reservoir in Spring Valley, the Robert A. Perdue Treatment Plant (Perdue Plant) can process 30 million gallons of water each day. The four-step cleaning process purifies water from the reservoir or from the untreated CWA aqueduct to meet state and federal requirements for potable water. The Perdue Plant includes four filters, chemical storage and feed equipment, pretreatment facilities, and a 10 million-gallon reservoir that serves as clearwell storage and the point of delivery into the Authority’s 388 miles of pipelines.

Richard A. Reynolds Groundwater Desalination Facility

Completed in 1999, the Reynolds Facility treats “brackish”, or saline, groundwater, producing up to five million gallons of drinking water per day from the San Diego Formation. This facility uses reverse osmosis technology to remove dissolved salts and microscopic
particles, coupled with additional treatments to remove iron and manganese and ensure disinfection.

**Urban Runoff Diversion System**
Located adjacent to the Sweetwater Reservoir, the Urban Runoff Diversion System (URDS) captures first flush storm flows and low flow runoff before the water enters the reservoir. Depending upon the quality of the runoff water, the system will route the water into the reservoir for treatment at the Perdue Plant, or around Sweetwater Dam and into the Sweetwater River. This system provides the Authority with a high level of control of the reservoir’s water quality, facilitating a more consistent, predictable, and cost-effective treatment process. In an average year, the system removes 535 tons of salts that would have otherwise been sent to Sweetwater Reservoir and recharges 98 million gallons of water to the lower river basin.

**Storage and Distribution**
The Authority manages and maintains an extensive storage and distribution system, including the following components:

- **Storage tanks:** 20 tanks accommodate 43.5 million gallons of treated water, including a major buried reservoir with a capacity of 18 million gallons
- **Pumping stations:** 23 pumping stations with a total capacity of 36,000 gallons per minute
- **Pipeline:** 388 miles with sizes ranging from 2-inch to 48-inch in diameter
- **Service connections:** 32,567
- **Valves:** 8,447
- **Public fire hydrants:** 2,511

**Future Projects**
To ensure a reliable water supply for the future, including sustaining the current infrastructure, the Authority has developed a number of planning documents that provide a guide to describing proposed projects. The major projects are as follows:

- **Expand Reynolds Facility**
- **Replace seven miles of 24- to 36-inch steel pipelines**
- **Replace 29 miles of 6- to 16-inch steel pipelines**
- **Construct five new water storage tanks**
- **Replace existing 10 million gallon Perdue Plant Clearwell**
- **Assure Sweetwater Dam can safely pass the probable maximum flood**
- **Replace existing stairway at Loveland Dam**
- **Restore the Sweetwater Reservoir Habitat Management area**
- **Replace the Finance and Customer Service software system**
OVER 120 SWEETWATER AUTHORITY EMPLOYEES PARTICIPATED IN THE PLANNING PROCESS.
II. strategic planning process

In developing the Strategic Plan—the first of its kind for the Authority—the Governing Board asked the Management Team to engage staff, institutional partners, and community members in an effort to develop a broad perspective about the Authority’s current status, issues, and opportunities for the future. Activities during the eight month process included the following:

- **Governing Board:** Each Board member provided direction for Strategic Plan development including their desired outcomes, major issues to be addressed, and planning priorities. In addition, Board members participated in a series of work sessions to provide ongoing feedback and direction on Strategic Plan elements.

- **Management Team Strategy Sessions:** The General Manager, Assistant General Manager, and six department heads convened over six strategy sessions to develop the Strategic Plan.

- **Community Interviews:** The Authority conducted one-on-one interviews with representatives of community organizations and agencies from the public and private sectors to identify future issues and opportunities related to water supply, water quality, reliability, and cost. Representatives of the City of National City, the City of Chula Vista, Department of Public Health, school districts, health care industry, businesses, and homeowner associations were among the groups contacted.

- **Community Survey:** A brief survey offered ratepayers the opportunity to comment on the Authority’s future goals and to confirm major issues and priorities.

- **Employee Engagement Meetings and Draft Plan Review:** Over 120 employees of the Authority participated in one or more meetings to review and comment on elements of the Strategic Plan Framework and to assist in development of planning goals and objectives. In addition, employees were given the opportunity to review and comment on the Administrative Draft version of the Strategic Plan.
PUBLIC EXPECTATIONS AND DEMANDS FOR ENVIRONMENTAL QUALITY WILL LEAD TO EVERMORE STRINGENT STANDARDS FOR WATER QUALITY AND SYSTEM RELIABILITY, ESPECIALLY IN TIMES OF EMERGENCY.
The Authority strategic planning participants identified the major issues and challenges which must be addressed in light of current and projected future environmental and economic conditions.

**ENSURING LONG TERM WATER SUPPLY**
Water supply and reliability continue to be the Authority’s top concerns. Competition among water users and uncertainties related to future climatic conditions and environmental constraints will necessitate a continued focus on this issue.

**MAINTAINING AFFORDABLE WATER RATES FOR ALL CUSTOMERS**
Residential and business customers alike demand that the Authority delivers water in a highly efficient and cost effective manner. All customers want to know that the rates they are being charged are fair and reasonable in light of prevailing market conditions.

**ENSURING LONG-TERM FINANCIAL HEALTH**
The Authority has an obligation to apply best practices in financial management to keep costs of operation as low as possible. The Authority must plan ahead to ensure that it has sufficient capital and operating revenues to cover all anticipated future costs.

**UPGRADING INFRASTRUCTURE**
A quality, well-maintained infrastructure leads directly to a high level of system reliability. The Authority must continue to make planned

*Dissolved air floatation tanks*
upgrades to its existing infrastructure to avoid obsolescence and prevent catastrophic system failure.

**INCREASING REGULATORY COMPLEXITY**
Environmental regulations to improve water quality will continue to be a top priority throughout our state and nation. Public expectations and demands for environmental quality will lead to evermore stringent standards for water quality and system reliability, especially in times of emergency.

**COMMUNICATING WITH AND ENGAGING OUR CUSTOMERS**
The Authority’s customer base is very diverse with respect to user types, income levels, service needs and expectations. Gaining a clear understanding of ratepayers’ needs and expectations requires a thoughtful and systematic approach to collecting customer feedback. Public outreach and educational programs must be tailored for each of the Authority’s major customer groups.

**EVOLVING WORKFORCE**
The Authority continues to focus on the development of sound training programs that meet regulatory requirements and assist in developing leadership skills that provide value to employees and the organization. Current staffing levels and structures will change in the near future with the retirement of many long-term employees. The Authority is challenged with facilitating knowledge transfer from retirees to new employees, evolving cultural expectations for workplace flexibility and quality, and maintaining innovation while maximizing effectiveness and efficiency.

**INVESTING IN NEW SYSTEMS AND PROCESSES**
The continuing development of new technologies and systems offers opportunities to improve the Authority’s efficiency and effectiveness. Yet the Authority must be strategic with such investments, ensuring a positive return on investment that improves overall cost-effectiveness and service delivery.
ACHIEVING FAST RECOVERY FROM EMERGENCIES AND CATASTROPHIC EVENTS

During a catastrophic event, water service is a priority need to address health and safety issues. Like other critical public services, the Authority must maintain a high level of preparedness and vigilance across a range of emergency scenarios including fire, earthquake, and power outage.

BUILDING AND MAINTAINING PUBLIC CONFIDENCE

Policy and decision-making for the Governing Board involves complex issues and trade-offs. As a public agency, the Authority must use all feasible means to document and communicate its decision-making process to ensure maximum transparency and public accountability.
THE FIRST OF ITS KIND FOR THE AUTHORITY, THE STRATEGIC PLAN PROVIDES THE OVER-ARCHING ORGANIZATIONAL STRUCTURE FOR THE AUTHORITY IN TRACKING AND ADVANCING POLICIES, PLANS, AND PROGRAMS.

“The Stones of Life”

Photo by Donald Denning
Palomar High School

Honorable Mention
2012 High School Photo Contest
IV. strategic plan framework

OVERVIEW

The Strategic Plan provides decision-making guidance for the Authority. It provides the over-arching organizational structure for the Authority in tracking and advancing policies, plans, and programs, to reflect a disciplined effort in making fundamental decisions for a rational course of action.

The first of its kind for the Authority, the Strategic Plan identifies its mission statement, vision statement, values, guiding principles, goals, objectives, and performance measures. Together, these elements are needed for continued success in Authority operations and management of its resources and assets. The Strategic Plan Framework diagram at the end of this chapter illustrates the relationship among the Strategic Plan elements.

Mission Statement

The Mission describes the Authority’s fundamental purpose, reason for existence, and primary roles and functions.

The mission of Sweetwater Authority is to provide its current and future customers with a safe, reliable and affordable water supply through the use of the best available technology, sound management practices, public participation and a balanced approach to human and environmental needs.

Vision Statement

The Vision statement describes the Authority’s desired future condition.

Sweetwater Authority is a premier water agency. We partner with the public and private sectors to maximize value for our rate payers. Our innovative water system infrastructure is functional, practical, and cost-effective. We provide a reliable and sustainable source of water. We consistently deliver industry-leading service to our customers.
IV. strategic plan framework

Values
Values are shared beliefs that reflect what the Authority considers significant or important.

- **Stewardship**: We produce quality water and care for natural and social environments
- **Respect**: We conduct our work with respect for our customers, our partners, the environment, and each other
- **Excellence**: We strive to meet or exceed the highest professional standards in all that we do
- **Teamwork**: We work together and with community partners to provide the best possible service to our customers
- **Integrity**: We are ethical in everything we do
- **Honesty**: Our activities and decisions are transparent

Guiding Principles
Guiding Principles are the rules of conduct that guide day-to-day operations and decision-making.

- **Put the customer first**
- **Be flexible, responding proactively to challenges and opportunities**
- **Design cost-effective solutions**
- **Operate with openness and authenticity**
- **Be fiscally responsible in decisions**

- **Be accountable to our customers for our actions**

Goals and Objectives
Goals are statements of long-term direction and intent, each of which includes objectives that are specific results describing an end product and completion date. The Authority’s strategic planning focuses on six goal areas that provide direction for achieving the Vision and Mission. Objectives and detailed actions are identified for each goal area.

- **Water Quality**: Provide high quality water that meets regulatory requirements
- **System Reliability**: Achieve an uninterrupted, long-term water supply through investment, maintenance, and environmental stewardship
- **Financial Viability**: Ensure the long-term financial viability of the agency
- **Customer Service**: Provide high-quality customer service
- **Staff Development**: Develop a highly-skilled, adaptable workforce and a safe, properly-equipped, and effective work environment
- **Administrative Effectiveness**: Provide efficient and effective administrative systems and procedures in accordance with best management practices
Performance Measures

*Performance Measures* are the basis for assessing progress toward achieving the Authority’s goals. While the Authority measures performance at a detailed level within each of its departments and for each employee, the following measures provide an over-arching perspective related to the Authority’s mission.

**Water Quality:** Provide high quality water that meets regulatory requirements

Water quality measures are linked to federal, state, and other water quality standards and include:

- Regulatory compliance for turbidity and disinfection
- Color, taste, odor
- Public notifications

The Authority strives to meet regulatory standards in a cost-effective and efficient manner.

**System Reliability:** Achieve an uninterrupted, long-term water supply through investment, maintenance and environmental stewardship

The following measures focus on maintaining a constant flow of water to the Authority’s ratepayers:

- Infrastructure integrity (leaks)
- System up time
- Adequate pressure under fireflow conditions

In addition to normal conditions, the Authority applies these measures to unforeseen circumstances beyond its control and emergency conditions, when possible.

**Financial Viability:** Ensure long-term financial viability of the agency

Sound financial management is a high priority for the Governing Board. The Authority ensures near- and long-term financial health for informed and prudent decision-making, operational effectiveness and efficiency, and key performance measures by maintaining:

- Fiscal solvency (balanced budget)
- Reserve funds
- Bond rating
- Nonrevenue water loss
**Customer Service:** Provide high-quality customer service.

Serving customers with a wide range of service needs and expectations requires the Authority to solicit customer feedback through many methods. Developing expanded customer feedback measures and methods will ensure the Authority responds to customers.

- Customer feedback

**Staff Development:** Develop a highly-skilled, adaptable workforce and a safe, properly-equipped, and effective work environment.

Staff development efforts must expand the Authority’s overall skill base, leadership capacity, and safety, meeting or exceeding state and federal regulatory standards as measured by:

- Certifications
- Accident/injury rate

**Administrative Effectiveness:** Provide efficient and effective administrative systems and procedures in accordance with best management practices.

Key performance measures of administrative effectiveness include:

- Strategic Plan implementation

The Strategic Plan provides the Authority’s overall guidance in implementing its mission and achieving its vision, which are the overarching measures of the Authority’s effectiveness.

**Performance Monitoring and Reporting**

The performance measures described above provide a framework for the Authority to monitor and report on its performance. Performance monitoring will take place in the form of:

- **Quarterly Management Reports:** Progress on the performance measures and results achieved will be documented and reported in quarterly reports prepared by the Authority’s management team.

- **Annual Budget:** Beginning with the Fiscal Year 2013-14 Annual Budget document, progress made on each performance measure will be documented and presented. Analysis of the results achieved will be used to define future targeted objectives for each of the goal areas in the Strategic Plan.
The mission of Sweetwater Authority is to provide its current and future customers with a safe, reliable and affordable water supply through the use of the best available technology, sound management practices, public participation and a balanced approach to human and environmental needs.

Sweetwater Authority is a premiere water agency. We partner with the public and private sectors to maximize value for our rate payers. Our innovative water system infrastructure is functional, practical, and cost-effective. We provide a reliable and sustainable source of water. We consistently deliver industry-leading service to our customers.

Stewardship  Respect  Excellence  Teamwork  Integrity  Honesty

Put the customer first.  Be flexible, responding proactively to challenges and opportunities.  Design cost-effective solutions.  Operate with openness and authenticity.  Be fiscally responsible in decisions.  Be accountable to our customers for our actions.

- Water Quality
- System Reliability
- Financial Viability
- Customer Service
- Staff Development
- Administrative Effectiveness


- Regulatory compliance for turbidity and disinfection
- Color, taste, odor
- Public notifications
- Infrastructure integrity
- System up time
- Adequate pressure under fire-flow conditions
- Fiscal solvency (balanced budget)
- Reserve funds
- Bond rating
- Nonrevenue water loss
- Customer feedback
- Certifications
- Accident/injury rate
- Strategic Plan implementation
"The Color of Water"

Photo by Michelle McClelland
Bonita Vista High School

Honorable Mention
2012 High School Photo Contest
V. goals and objectives

The following section describes each of the six goal areas and their related objectives. Detailed Work Plans, found in Appendix A, provide the specific activities required to implement the goals and objectives.

The goals are:

**GOAL #1 Water Quality**
*Provide high quality water that meets regulatory requirements.*

**GOAL #2 System Reliability**
*Achieve an uninterrupted, long-term water supply through investment, maintenance and environmental stewardship.*

**GOAL #3 Financial Viability**
*Ensure long-term financial viability of the agency.*

**GOAL #4 Customer Service**
*Provide high-quality customer service.*

**GOAL #5 Staff Development**
*Develop a highly-skilled, adaptable workforce and a safe, properly-equipped, and effective work environment.*

**GOAL #6 Administrative Effectiveness**
*Provide efficient and effective administrative systems and procedures in accordance with best management practices.*
## V. Goals and Objectives

### GOAL #1 Water Quality (WQ)

*Provide high quality water that meets regulatory requirements.*

<table>
<thead>
<tr>
<th>Objectives</th>
<th>Source Document</th>
<th>Mandatory Requirement (MR) or Industry Standard (IS)</th>
<th>Departmental Lead</th>
<th>Completion Date</th>
<th>Funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>WQ1: Minimize taste and odor events to less than two customer complaints per year per 1,000 acre-feet of water sold (this equates to 40 taste and odor complaints based on 19,416 acre-feet of water sold)</td>
<td>EPA National Primary Drinking Water Regulation Secondary Standard, AWWA</td>
<td>IS</td>
<td>Water Quality</td>
<td>Ongoing; Reported Annually</td>
<td>Expense Budget</td>
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<tr>
<td>WQ2: Achieve a combined filter effluent turbidity goal of less than 0.1 NTU 99 percent of the time</td>
<td>AWWA Partnership for Safe Drinking Water</td>
<td>IS</td>
<td>Water Quality</td>
<td>Ongoing; Reported Monthly</td>
<td>Expense Budget</td>
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<td>WQ3: Achieve a clearwell effluent chlorine residual of between 2.0 and 3.5 mg/L.</td>
<td>AWWA Partnership for Safe Drinking Water</td>
<td>IS</td>
<td>Water Quality</td>
<td>Ongoing; Reported Monthly</td>
<td>Expense Budget</td>
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<tr>
<td>WQ4: Remove sediment and biofilm build-up through unidirectional flushing of distribution pipe lines (a 3-year process) at 6-10 year intervals</td>
<td>AWWA Partnership for Safe Drinking Water</td>
<td>IS</td>
<td>Distribution</td>
<td>2014-2017</td>
<td>Expense Budget</td>
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<tr>
<td>WQ5: Apply the management plan recommendations of standards for permitting adaptive, long-term management of Authority lands and operations as defined in the Habitat Management Plan</td>
<td></td>
<td></td>
<td>MR</td>
<td>Water Quality</td>
<td>Ongoing; Reported Annually</td>
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### GOAL #1 Water Quality (WQ) - CONTINUED

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<tbody>
<tr>
<td>WQ6: Restore the east end habitat at Sweetwater Reservoir upon receipt of grant funding as defined in the Habitat Recovery Project</td>
<td>CDFG and USFWS Upper Sweetwater Reservoir Habitat Management Permits</td>
<td>IS</td>
<td>Water Quality</td>
<td>2017</td>
<td>Capital Budget</td>
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<tr>
<td>WQ7: Study alternatives to relocating the brine pipeline and discharge point from the Reynolds Groundwater Desalination Facility and redirecting resources to monitoring and habitat enhancement</td>
<td>RWQCB, NPDES Permit for waste discharge for RAR Desalination Facility</td>
<td>MR</td>
<td>Water Quality</td>
<td>2013</td>
<td>Expense Budget</td>
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<tr>
<td>WQ8: Obtain permit renewal from Regional Board for Reynolds Desalination discharge.</td>
<td>RWQCB, NPDES Permit for waste discharge for RAR Desalination Facility</td>
<td>MR</td>
<td>Water Quality</td>
<td>2015</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>WQ9: Maintain and improve the Supervisory Control and Data Acquisition (SCADA) system for all treatment and distribution facilities as defined in the SCADA Master Plan</td>
<td>SCADA Master Plan</td>
<td>IS</td>
<td>Water Quality</td>
<td>Ongoing; Reported Annually</td>
<td>Expense Budget</td>
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V. goals and objectives

GOAL #1 Water Quality (WQ) - CONTINUED

*Provide high quality water that meets regulatory requirements.*

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<th>objectives</th>
<th>source document</th>
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<th>funding</th>
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<tr>
<td>WQ10: Track development and manage watershed activities for the beneficial use of the Authority and protect the environment for future benefit of species and Authority operations</td>
<td>Watershed Sanitary Survey</td>
<td>MR</td>
<td>Water Quality</td>
<td>August 2017</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>WQ11: Provide a documented layout and potential project costs for a variety of future improvements at the Perdue Plant as defined in the Perdue Plant Master Plan</td>
<td>Perdue WTP Master Plan</td>
<td>IS</td>
<td>Water Quality</td>
<td>2015, or as funds become available, or regulations require</td>
<td>Expense Budget</td>
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</tbody>
</table>
### GOAL #2 System Reliability (SR)

*Achieve an uninterrupted, long-term water supply through investment, maintenance and environmental stewardship.*

<table>
<thead>
<tr>
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<th>source document</th>
<th>mandatory requirement (MR) or industry standard (IS)</th>
<th>departmental lead</th>
<th>completion date</th>
<th>funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR1: Replace the top 60 critical existing metallic mains with new pipelines to minimize the potential for leaks and failures as defined in the Metallic Main Replacement Program</td>
<td>2010 Water Distribution System Master Plan</td>
<td>IS</td>
<td>Engineering</td>
<td>June 2020</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>SR2: Install new pipelines to upgrade capacity and reliability of the distribution network for adequate pressure throughout the system with appropriate redundancy</td>
<td>2010 Water Distribution System Master Plan</td>
<td>IS</td>
<td>Engineering</td>
<td>Top 3 pipelines by June 2013; full installation by June 2035</td>
<td>Improvements needed for growth funded by developers. Other improvements funded by Capital Budget.</td>
</tr>
<tr>
<td>SR3: Minimize corrosion and replacement of finished water storage tanks through routine inspections and corrective actions</td>
<td>2010 Water Distribution System Master Plan</td>
<td>IS</td>
<td>Engineering</td>
<td>Ongoing</td>
<td>Expense and Capital Budgets</td>
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<tr>
<td>SR4: Increase finished water storage capacity in deficient zones as defined in the 2010 Water Distribution System Master Plan</td>
<td>2010 Water Distribution System Master Plan</td>
<td>IS</td>
<td>Engineering</td>
<td>June 2035</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>SR5: Provide additional pumping capacity for Hydropneumatic Zones to ensure adequate pumping capacity at each pump station</td>
<td>2010 Water Distribution System Master Plan</td>
<td>IS</td>
<td>Engineering</td>
<td>June 2035</td>
<td>Capital Budget</td>
</tr>
</tbody>
</table>

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GOAL #2 System Reliability (SR) - CONTINUED
Achieve an uninterrupted, long-term water supply through investment, maintenance and environmental stewardship.

<table>
<thead>
<tr>
<th>objectives</th>
<th>source document</th>
<th>mandatory requirement (MR) or industry standard (IS)</th>
<th>departmental lead</th>
<th>completion date</th>
<th>funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR6: Assess the condition of asbestos cement (AC) pipe and conduct appropriate replacements to prevent failures and maximize service life throughout the distribution network</td>
<td>AC Pipe Replacement Program</td>
<td>IS</td>
<td>Engineering</td>
<td>June 2035</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>SR7: Operate all distribution valves over a three-year cycle, and all transmission valves 14-inches and larger once a year, replacing valves that meet established replacement criteria outlined in the Valve Maintenance and Replacement Program</td>
<td>AWWA M44 Distribution Valves: Selection, installation, field testing and maintenance</td>
<td>IS</td>
<td>Distribution</td>
<td>Ongoing</td>
<td>Expense and Capital Budgets</td>
</tr>
<tr>
<td>SR8: Operate all fire hydrants over a three-year cycle and replace fire hydrants that meet established replacement criteria as part of the Fire Hydrant Maintenance and Replacement Program</td>
<td>AWWA M17 Installation, field testing and maintenance of fire hydrants</td>
<td>IS</td>
<td>Distribution</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>SR9: Maintain and replace fleet vehicles according to manufacturers’ standards and replacement criteria as defined in the Fleet Maintenance/Replacement Program</td>
<td>Vehicle and Equipment manufacturer’s service standards. 1997 Board approved Vehicle Replacement Program.</td>
<td>IS</td>
<td>Distribution</td>
<td>Ongoing</td>
<td>Capital Budget</td>
</tr>
</tbody>
</table>
### GOAL #2 System Reliability (SR) - CONTINUED

<table>
<thead>
<tr>
<th>objectives</th>
<th>source document</th>
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<th>funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>SR10: Comply with Heavy Equipment Replacement policies from the California Air Resources Board</td>
<td>California Air Resources Board</td>
<td>MR</td>
<td>Distribution</td>
<td>2025</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>SR11: Address Division of Safety of Dams (DSOD) and maintenance requirements to accommodate Probable Maximum Flood (PMF) for Sweetwater Dam and stairs replacement at Loveland Dam</td>
<td>DSOD Letter dated 6/20/11 and report titled “Evaluation of Alternatives to Increase Spillway Capacity of Sweetwater Dam” GEI, July 2008</td>
<td>MR</td>
<td>Engineering</td>
<td>June 2020</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>SR12: Maximize local water supplies by expanding the capacity of the Richard A. Reynolds Groundwater Desalination Facility up to 10 mgd</td>
<td>2010 Urban Water Management Plan</td>
<td>IS</td>
<td>Engineering</td>
<td>June 2017</td>
<td>Reserves; Title 16 and State Prop. 50 Grant Funding</td>
</tr>
<tr>
<td>SR13: Respond to the needs of Chula Vista, National City, and County of San Diego to facilitate implementation of the respective street improvement projects in a fiscally responsible manner</td>
<td>1953 Agreement with Chula Vista; 1962 Agreement w/ County of SD; National City incorporated prior to Kimball Bros. Easement</td>
<td>MR</td>
<td>Engineering</td>
<td>Ongoing</td>
<td>Capital Budget</td>
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</tbody>
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GOAL #3 Financial Viability (FV)

Ensure long-term financial viability of the agency.

<table>
<thead>
<tr>
<th>objectives</th>
<th>source document</th>
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<th>departmental lead</th>
<th>completion date</th>
<th>funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>FV1: Develop an annual budget that determines yearly expenditures, incorporates a five-year projection to track fiscal stability, and guides rate-setting decision-making</td>
<td>Authority Policy</td>
<td>MR</td>
<td>Finance</td>
<td>Annual</td>
<td>N/A</td>
</tr>
<tr>
<td>FV2: Replace the Customer Service and Financial Information Systems to improve efficiency</td>
<td>Annual Budget</td>
<td>IS</td>
<td>Finance</td>
<td>June 2014</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>FV3: Update the Authority’s fiscal policies to include debt, reserve, and investment polices to achieve a favorable bond rating in support of a bond issue for capital projects</td>
<td>Investment Policy (per policy)</td>
<td>MR</td>
<td>Finance</td>
<td>June 2013</td>
<td>Expense Budget</td>
</tr>
</tbody>
</table>
GOAL #3 Financial Viability (FV) - CONTINUED
Ensure long-term financial viability of the agency.

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>FV4: Issue bond in FY 2014-15 to fund up to $45 million in capital projects as defined in the 2010 Water Distribution Master Plan</td>
<td>2010 Water Distribution Master Plan</td>
<td>IS</td>
<td>Finance</td>
<td>2015</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>FV5: Identify and pursue grant funds for high priority projects and programs including, but not limited to, legislative advocacy, Integrated Regional Water Management, Bur Rec Title XIV, and Proposition 50</td>
<td>Annual Budget</td>
<td>IS</td>
<td>General Manager</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>FV6: Replace meters aged 15 years for consistent revenue collections as defined in the Meter Replacement Program</td>
<td>Annual Budget</td>
<td>IS</td>
<td>Finance</td>
<td>Ongoing</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>FV7: Study the feasibility of implementing an Advanced Metering Infrastructure (AMI) or Automated Meter Reading (AMR) to improve the efficiency and precision of the current meter reading process</td>
<td>Annual Budget</td>
<td>IS</td>
<td>Finance</td>
<td>2015</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>FV8: Conduct Comprehensive Water Audit to determine level of nonrevenue water losses and potential mitigation strategies and initiatives</td>
<td>AWWA Manual 36</td>
<td>IS</td>
<td>General Manager</td>
<td>June 2013</td>
<td>Expense Budget</td>
</tr>
</tbody>
</table>

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V. goals and objectives

**GOAL #4 Customer Service (CS)**
*Provide high-quality customer service.*

<table>
<thead>
<tr>
<th>objectives</th>
<th>source document</th>
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<th>completion date</th>
<th>funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>CS1: Evaluate the credit card acceptance policy and identify potential revisions to increase customer satisfaction and enhance the bill collection process</td>
<td>Annual Budget</td>
<td>IS</td>
<td>Finance</td>
<td>June 2014</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>CS2: Develop an expanded Customer Outreach program to include, but not be limited to, attending community events and school programs, producing educational materials, and conducting customer surveys</td>
<td>Annual Budget</td>
<td>IS</td>
<td>Administration</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>CS3: Expand web-based communications to include, but not be limited to, distributing public notifications, distributing e-notifications/news, and posting to Authority social media pages/sites</td>
<td>Annual Budget</td>
<td>IS</td>
<td>Administration</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
</tbody>
</table>
## GOAL #5 Staff Development (SD)

*Develop a highly-skilled, adaptable workforce and a safe, properly-equipped, and effective work environment.*

<table>
<thead>
<tr>
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</thead>
<tbody>
<tr>
<td>SD1: Achieve professional and regulatory certifications as required by job classifications to perform assigned duties</td>
<td>Fed OSHA Cal OSHA CCR Title 8 CDPH DPR Cal Govt Code DMV</td>
<td>MR</td>
<td>Administrative Services</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>SD2: Provide tuition reimbursement to eligible staff for continuing their formal education on a voluntary basis during off-hours</td>
<td>MOU/Contractual</td>
<td>MR</td>
<td>Administrative Services</td>
<td>June 2013</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>SD3: Create a Leadership Development Program that engages eligible staff in developing leadership skills to support their professional development and to meet the Authority’s needs for leadership capacity</td>
<td>Human Resources Best Management Practice</td>
<td>IS</td>
<td>Administrative Services</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>SD4: Develop and implement employee rotation/cross training over time to ensure consistent staff knowledge and experience</td>
<td>Human Resources Best Management Practices</td>
<td>IS</td>
<td>Administrative Services</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
</tbody>
</table>

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GOAL #5 Staff Development (SD) - CONTINUED
*Develop a highly-skilled, adaptable workforce and a safe, properly-equipped, and effective work environment.*

<table>
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<tr>
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<tbody>
<tr>
<td>SD5: I. Conduct annual performance evaluations</td>
<td>MOU</td>
<td>IS</td>
<td>Administrative Services</td>
<td>Annual Cycle</td>
<td>Expense Budget</td>
</tr>
<tr>
<td></td>
<td>Human Resources Best Management Practice</td>
<td>IS</td>
<td></td>
<td>June 2013</td>
<td></td>
</tr>
<tr>
<td>II: Develop baseline Authority-wide measures for customized measures to each department and position to document efficiency, competency, conduct, areas of improvement, and merit of Authority employees</td>
<td></td>
<td></td>
<td>Administrative Services</td>
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<tr>
<td>SD6: Identify and implement expanded risk management and safety protocols to reduce experience modification and incident rates at or below industry standards</td>
<td>Joint Powers Insurance Agency</td>
<td>MR</td>
<td>Administrative Services</td>
<td>Bi-Annual</td>
<td>Expense Budget</td>
</tr>
<tr>
<td></td>
<td>Cal/OSHA OSHA</td>
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<td>Ongoing</td>
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GOAL #6 Administrative Effectiveness (AE)
Provide efficient and effective administrative systems and procedures in accordance with best management practices.

<table>
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<tr>
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<tbody>
<tr>
<td>AE1: Develop a comprehensive water use efficiency plan to include, but not be limited to, meeting or exceeding 20x2020 and California Urban Water Conservation Council (CUWCC) goals/reporting requirements</td>
<td>SBx 7-7 and CUWCC MOU</td>
<td>MR</td>
<td>Administrative Services</td>
<td>2020</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>AE2: Increase conserved water supplies through water efficiency education and assistance programs and outreach efforts, through strategic partnerships with public and private agencies, and developing effective rate setting strategies.</td>
<td>Annual Budget and CUWCC MOU</td>
<td>MR</td>
<td>Administration</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>AE3: Update the Emergency Response and Recovery Plan and exercises</td>
<td>State Division of Safety of Dams and Local Office of Emergency Services</td>
<td>MR/IS</td>
<td>Administrative Services</td>
<td>Ongoing</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>AE4: Complete implementation of the 2002 Information Systems Strategic Plan</td>
<td>2002 Information Systems Strategic Plan</td>
<td>IS</td>
<td>Information Systems</td>
<td>June 2014</td>
<td>Expense and Capital Budgets</td>
</tr>
<tr>
<td>AE5: Update the Information Systems Strategic Plan</td>
<td>2002 Information Systems Strategic Plan</td>
<td>IS</td>
<td>Information Systems</td>
<td>June 2014</td>
<td>Expense and Capital Budgets</td>
</tr>
</tbody>
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## GOAL #6 Administrative Effectiveness (AE) - CONTINUED
Provide efficient and effective administrative systems and procedures in accordance with best management practices.

<table>
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<th>funding</th>
</tr>
</thead>
<tbody>
<tr>
<td>AE6: Implement the enterprise-wide Asset Management System (&quot;Maximo&quot;) to track and maintain all Authority assets</td>
<td>2002 Information Systems Strategic Plan</td>
<td>IS</td>
<td>Information Systems</td>
<td>June 2016</td>
<td>Capital Budget</td>
</tr>
<tr>
<td>AE7: Assess the requirements, costs and the Authority’s positioning for pursuing American Public Works Association Accreditation to establish a process for verifying and recognizing compliance with recommended best practices</td>
<td>Public Works Management Practices Manual</td>
<td>IS</td>
<td>General Manager</td>
<td>March 2014</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>AE8: Revise the monthly Management Reports to a “dashboard” format that incorporates current and future performance measures to improve ease of use and understanding for the Board and interested stakeholders</td>
<td>Strategic Plan</td>
<td>IS</td>
<td>General Manager</td>
<td>December 2012</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>AE9: Maintain and update existing policies and procedures</td>
<td>Current Sweetwater Authority Policies and Procedures (staff)</td>
<td>IS</td>
<td>General Manager</td>
<td>Annual</td>
<td>Expense Budget</td>
</tr>
<tr>
<td>AE10: Continue to assess the feasibility of optimizing the use of outsourcing services and operations</td>
<td>Current Sweetwater Authority Policies and Procedures (staff)</td>
<td>IS</td>
<td>General Manager</td>
<td>October 2012 and Ongoing</td>
<td>Expense Budget</td>
</tr>
</tbody>
</table>
Current Sweetwater Authority organization
THE AUTHORITY IS PROUD TO PROVIDE SAFE, RELIABLE DRINKING WATER TO ITS CUSTOMERS
Implementation of the Strategic Plan is directed by the Authority’s General Manager through the Management Team: the Assistant General Manager and department heads. The Management Team is responsible for implementing the goals and objectives as prescribed in the detailed Work Plans, found in Appendix A.

An important step during the first year of implementation is aligning the structure of the Fiscal Year 2013-14 budget documents with the Strategic Plan goals and objectives. Additionally, the Management Team will develop and utilize a format to record and monitor implementation progress. The General Manager will present the Governing Board with quarterly and annual reports of implementation progress.

The Strategic Plan will be a living document, and will be updated as circumstances warrant.
THE AUTHORITY SERVES APPROXIMATELY 184,000 PEOPLE IN THE SOUTH BAY REGION OF SAN DIEGO COUNTY, CALIFORNIA.