

El Dorado Irrigation District 2009-2013 Strategic Guide

Customers



Employees



Business practices



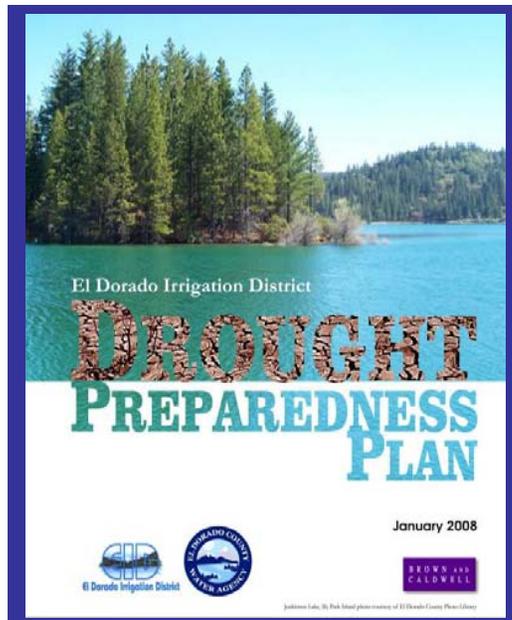
Financial



About EID

El Dorado Irrigation District is a public water utility serving more than 100,000 people in northern California's El Dorado County. With water rights in the Sierra Nevada foothills that date back to the state's gold rush days, the District has evolved to meet the needs of a growing and diverse customer base.

The District provides a wide range of products and services — from drinking water and water for agriculture to wastewater treatment, recycled water for commercial and public landscapes and residential front and back yards, hydroelectric and solar power generation, and outstanding recreation in Sierra Nevada alpine and western slope environments. Water-efficiency programs create opportunities for customers to save both water and money, while cost-saving benefits are realized by all EID customers through the District's energy demand-reduction program.



EID's proactive drought preparedness plan targets specific actions for the District and our customers to take during dry years.

EID's service area spans 220 square miles, almost all in El Dorado County, and ranges from 500 feet in elevation at the Sacramento County line to 4,000 feet in the Sierra Nevada range. Water is provided to approximately 40,000 accounts and wastewater treatment services to more than 19,000 accounts.

The District's water system requires 181 pressure-regulating zones to operate reliably. It includes more than 1,200 miles of pipeline, 40 miles of ditches, 6 treatment plants, 33 storage reservoirs, and 21 pumping stations.

The wastewater collection and treatment system comprises more than 300 miles of line, 64 lift stations, and 5 treatment facilities. The system produces high-quality recycled water for landscape irrigation in the western part of the District's service area.

Project 184, the District's hydroelectric power generation system, consists of 23 miles of canals, flumes, tunnels, and siphons for conveying water from lakes and reservoirs in the Sierra. The Project's 21-megawatt power house pictured below produces state-certified "clean" energy. The District also manages a number of recreation facilities under the Project's operating license from the Federal Regulatory Energy Commission.



About the Strategic Guide

This document constitutes the strategic guide for El Dorado Irrigation District over the next five years.

The guide was created following a management assessment commissioned by the District's Board of Directors in early 2008 and completed by Westin Engineering, Inc. in May 2008. The assessment's number one recommendation was to develop a District-wide strategic plan.

The planning process began a month after the Westin report was received, when the District organized employee/management teams to recommend goals and strategies related to four core areas—customers, employees, finances, and business practices. The results were reviewed by a steering committee comprised of EID's executive management team and shaped into the strategic guide with the assistance of experts in business and management practices from Westin. Oversight and comments from the Board of Directors improved the product. The employee/management teams reviewed, validated, and refined the final draft.

Staff prepared detailed worksheets for each strategy. The worksheets assign priority status, responsible staff, and tasks. Performance measures are being developed to assist in evaluating the degree of success and determining whether the goals and strategies need to be modified.

Many of the priority strategies described in these pages are underway. For some strategies, all tasks have been completed and are being monitored and evaluated.

Overall, the guide provides a structure that allows the District to move forward with firm purpose and greater accountability for decisions and actions in the coming years. It is a living, working document. Staff will monitor progress and modify the guide and accompanying worksheets as needed to meet new challenges and changing circumstances.

April 2009

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Foundation

Mission

We are a public agency dedicated to providing high-quality water, wastewater treatment, recycled water, hydropower, and recreation services in an environmentally and fiscally responsible manner.

Revised and adopted by the District's Board of Directors in 2005

Vision

As we move forward with this plan, we will look with great pride on EID's success as a highly respected water agency, both in El Dorado County and among our water industry peers. The District will have achieved a well-deserved reputation as a collaborative, learning organization that is financially stable and technically advanced in key areas such as infrastructure, water quality, water supply, conservation, and environmental sustainability. Our customers will consistently praise our high standards of service and the value we provide. As employees, we will celebrate our achievements together and look forward to continued success. The Board of Directors will share in that feeling of success and express pride in all that they and the District's employees have accomplished together.

District Values

Achieving the District's mission and bringing the District's vision to life requires adherence to fundamental values such as integrity, commitment to excellence, public trust, strong internal and external relationships, and individual responsibility.

Integrity

We treat people with dignity and respect, guided by fairness and honesty.

Commitment to excellence

We create, learn from experience, and strive for improvement.

Public trust

We honor and promote public confidence by protecting health and the environment. We listen to, appreciate, and are responsive to our customers.

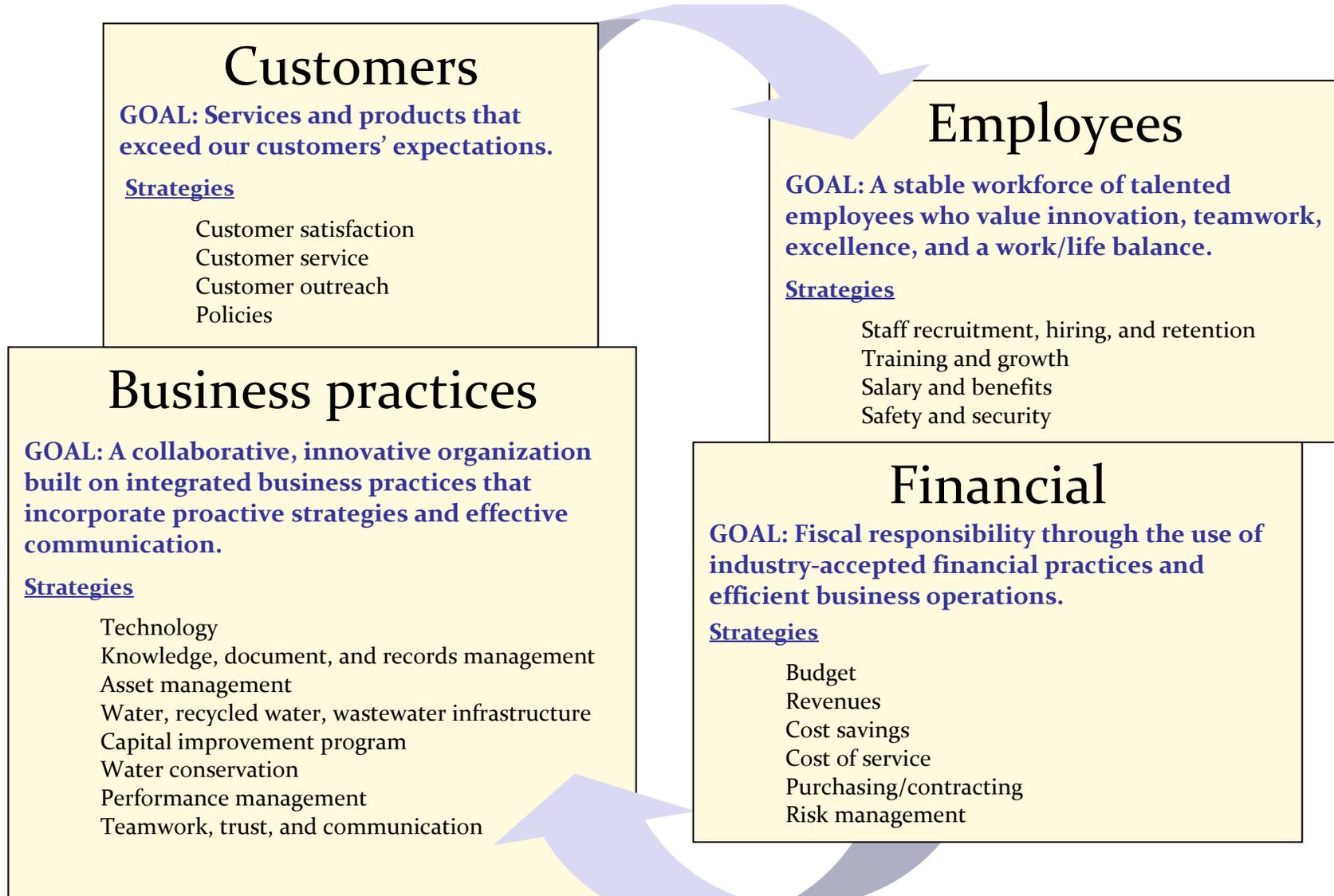
Strong relationships

Our success depends on our ability to collaborate with customers and colleagues by recognizing that we all have valuable contributions to make.

Responsibility

We are accountable for our individual conduct and obligations.

Interconnected goals and strategies chart the way to success



1. Customers

GOAL: Services and products that exceed our customers' expectations.

Strategies

A. CUSTOMER SATISFACTION — Ensure that our customers receive the service they expect.

1. Implement a formal customer survey program for all customer classes.
2. Develop a formal customer-concern tracking and resolution program.
3. Develop a recreation customer call-tracking system.
4. Increase our customers' first call success.

B. CUSTOMER SERVICE — Improve customer service through effective use of technology.

1. Expand available services on the District's website.
2. Examine the potential to provide audio of Board meetings and information workshops over the internet for external audiences.
3. Implement interactive voice response for customer calls with an upfront option to talk to a customer service representative.
4. Automate the recreation reservation process.
5. Optimize the use of automated payments.

C. CUSTOMER OUTREACH — Inform our stakeholders about wise use of water and recycled water and safe use of wastewater services.

1. Develop a comprehensive customer information/outreach program to include District-wide issues.
 - a. Evaluate existing information materials and the means and frequency of communication, including outside events.
 - b. Enhance, expand or develop new customer information programs where appropriate.
 - c. Assign District-wide accountability for program execution.
2. Implement a formal water education program for local schools.
3. Continue to inform customers and the national, state, and local water industry of EID policies and actions regarding key issues.

D. POLICIES — Ensure fair and consistent treatment of all customers.

1. Develop a formal series of standard operating procedures tied to the District's Board Policies and Administrative Regulations that pertain to interactions with customers.
2. Train management and staff in and enforce consistent application of Board Policies, Administrative Regulations, construction standards, and standard operating procedures for all customers.

2. Employees

GOAL: A stable workforce of talented employees who value innovation, teamwork, excellence, and a work/life balance.

Strategies

A. RECRUIT, HIRE, AND RETAIN STAFF — Develop and carry out effective recruitment and retention strategies.

1. Develop a District-wide recruitment and selection plan.
2. Initiate a formal, District-wide employee recognition program.
3. Improve the performance evaluation process.
 - a. Establish a tie-in for the 90-day new-hire evaluation.
4. Improve the ability to retain volunteers.
5. Expand the college recruitment program.

B. TRAINING AND DEVELOPMENT — Develop the District as a learning organization.

1. Expand the new-hire orientation program.
2. Develop a formal succession plan with associated career development.
 - a. Evaluate the use of reclassifications.
 - b. Establish clearly defined career paths and promotion guidelines.
 - c. Leadership and professional development training for all staff, focused on those who perform—or are interested in—management roles.
 - d. Formal, mandatory training program for all existing and new supervisors.
3. Develop a training program for employees who routinely interact with customers.
4. Track regulatory training compliance, licenses, and certifications through a centralized process.
5. Develop and implement a knowledge-transfer and/or mentorship program.
 - a. Develop a transition program for employees close to retirement.

C. SALARY AND BENEFITS — Maintain a competitive career and compensation structure.

1. Perform new classification and compensation studies and implement as appropriate.
 - a. Formalize and consolidate job descriptions to identify qualifications, job duties, distinguishing characteristics, and reporting relationships.
 - b. Establish position salaries based on appropriate external and internal equities.
 - c. Evaluate current health insurance plans for comprehensiveness and affordability and recommend relevant options.
 - d. Evaluate management wellness and employee fitness programs.
 - e. Evaluate current out-of-class pay practice.
 - f. Develop and implement consistent work/life balance practices.

D. SAFETY AND SECURITY — Ensure a healthy, safe, and secure work environment.

1. Continue to identify and abate actual or potential injuries to employees.
2. Develop an effective emergency operations center.

3. Financial

GOAL: Fiscal responsibility through the use of industry-accepted financial practices and efficient business operations.

Strategies

A. BUDGET — Continue to develop timely and fiscally responsible operating and CIP budgets and policies.

1. Enhance the annual operating budget process.
2. Update the five-year CIP annually, prior to adopting the operating budget, and adopt a fund-by-fund budget with requirements for monthly operating reports and quarterly reports on all other aspects of the budget.
3. Establish budgets in which operating revenues match operating expenses.
4. Establish formal reserve fund policies and funds.

B. REVENUES — Optimize District revenues.

1. Reduce the District's reliance on property tax revenues and facility capacity charges to meet debt service requirements.
2. Adjust facility capacity charges and water, wastewater, and recycled water rates in alignment with changing operating costs and annual inflation rates.
3. Prepare five-year financial forecasts that take into account relevant internal and external factors.
4. Improve the efficiency of the hydroelectric power generation system and marketing to increase revenues.
5. Obtain full cost recovery of District services.
6. Ensure that user fees cover a larger share of the costs of operating and improving the District's recreation facilities.
7. Optimize the revenue generation potential of the District's real property interests.
8. Optimize grant revenues and ensure grant compliance.

C. COST SAVINGS — Prioritize opportunities to effect cost savings across the District.

1. Evaluate and implement methods to reduce costs.
2. Formalize and execute a strategy to manage the OPEB unfunded liability.
3. Evaluate the costs and benefits of meeting sampling requirements through in-house versus external facilities.
4. Work with regulators to pursue allowable waivers of mandates and requirements.

D. COST OF SERVICE — Formalize business processes and monitor associated costs.

1. Develop cost-of-service reports and identify efficiencies within routine business processes.
 - a. Document routine as-is business processes.
 - b. Educate staff on the desired business processes, with emphasis on the interconnection of individual tasks.
 - c. Establish a cost-allocation method for support costs that can be tied directly to District services.
2. Align financial reporting with cost-of-service processes.

E. PURCHASING/CONTRACTING — Improve purchasing efficiency and effectiveness.

1. Streamline the purchasing process.
2. Establish a prequalified list of construction contractors to perform small construction contracts.
3. Develop consistent District-wide standards for the purchase of goods, requests for bids, requests for proposals, and statements of qualifications.
4. Centralize and coordinate District-wide software purchases.

F. RISK MANAGEMENT — Proactively manage known and potential risks to the District.

1. Assess and align the District's risk management functions.
2. Reduce the liability associated with the District's real property interests.
 - a. Identify all of the District's real property interests using GIS and records management applications.
 - b. Abate encroachments on District easements and other real property interests.
 - c. Identify and address liability risks associated with District-owned real property.

4. Business Practices

GOAL: A collaborative, innovative organization built on integrated business practices that incorporate proactive strategies and effective communication.

Strategies

A. TECHNOLOGY — Leverage the District's technology investments.

1. Fully implement Great Plains and enhance reporting capabilities.
2. Maximize the use of Hansen.
 - a. Improve access and streamline associated business processes.
 - b. Use Hansen to improve the tracking of developer-donated assets.
 - c. Manage the development review processes through Hansen.
3. Develop a geographic information system (GIS) master plan.
 - a. Establish GIS governance and standards to ensure program stability.
 - b. Integrate GIS with hydraulic modeling software to enhance the capital improvement program,
 - c. Implement a District-wide GIS database to capture and store utility geospatial data.
4. Develop a supervisory control and data acquisition (SCADA) master plan and establish District-wide SCADA governance and standards.
5. Implement on-line timecards.
6. Integrate CMMS, GIS, and CIS to streamline the service-request-to-work-order process.
7. Deploy work management applications to field maintenance personnel and field engineers.
8. Implement effective construction inspection application tools to streamline collaboration and enforce compliance with District standards.
9. Implement an integrated data and voice network.
10. Implement a laboratory information management system to enable effective analysis and to improve compliance reporting of water quality data.

B. KNOWLEDGE, DOCUMENT, AND RECORDS MANAGEMENT — Improve District-wide knowledge and records management.

1. Develop and implement a District-wide information sharing plan.
2. Develop and implement a District-wide records management program.
 - a. Complete the new records storage area.
 - b. Develop an information retention plan for microfiche files.
 - c. Implement electronic records management capabilities and practices to effectively maintain critical District records.

C. ASSET MANAGEMENT — Sustain the District's infrastructure investments.

1. Develop and implement a comprehensive life-cycle asset management program.
 - a. Complete the inventory of all District assets.
 - b. Implement an asset criticality and condition assessment program.
 - c. Develop a long-term asset replacement and refurbishment model.
 - d. Track all procurement, installation, maintenance, and disposal costs for each asset.
2. Continuously improve the District's preventative maintenance activities.
3. Develop accurate as-built records of infrastructure.
4. Evaluate the District's landscaping and vegetation management services.
5. Implement recommendations contained in the Sly Park master plan.
6. Implement a new construction meter rental program to enhance asset tracking and backflow compliance.

D. WATER, RECYCLED WATER, AND WASTEWATER INFRASTRUCTURE — Provide a reliable supply of high-quality water, recycled water, and wastewater services.

1. Complete the integrated water/recycled water and master plans and implement their recommendations.
 - a. Minimize the use of potable water to supplement the demand for recycled water.
 - b. Develop a comprehensive program to reduce inflow and infiltration.
 - c. Improve hydraulic modeling capabilities for water, wastewater, and recycled water and integrate with GIS.
2. Implement existing recommendations to reduce real and apparent water losses.
3. Review and update design standards, field procedures, and construction standards.
4. Develop and implement a vulnerability assessment for wastewater treatment facilities.
5. Review and update standard operating procedures for the operation of the water, wastewater, recycled water, and Project 184 systems.
6. Implement recommendations in the ditch master plan.
7. Continue to coordinate, educate, and develop partnerships throughout the South Fork American River watershed to protect water quality and water supply reliability.

E. CAPITAL IMPROVEMENT PROGRAM — Improve management of the capital improvement program.

1. Formalize the District's capital improvement program planning and project tracking processes as standard operating procedures.
 - a. Include construction contractor requirements.
 - b. Include real property acquisition requirements at the beginning of capital improvement program projects.
 - c. Include standard safety and security specifications.
 - d. Include environmental overview.
2. Implement effective capital improvement program management and reporting tools.

F. WATER CONSERVATION — Maximize water conservation.

1. Implement recommendations contained in the drought preparedness plan.
2. Continue to improve the irrigation management service program to achieve even more efficient use of agricultural water.

G. PERFORMANCE MANAGEMENT — Monitor performance against desired levels of service and communicate the results.

1. Develop and implement a formal performance management program.
2. Develop a procedure to communicate effectively the results of the program to key stakeholders.

H. TEAMWORK, TRUST, AND COMMUNICATION — Create a culture of collaboration and teamwork.

1. Develop a high-performing management team.
2. Conduct an annual or bi-annual survey of employees and distribute the results.
3. Formalize the use of continuous improvement teams to develop District-wide improvements.
4. Improve the partnership and communications among management and employees.
5. Establish a culture of accountability and consistency in management actions, decisions, and words.



El Dorado Irrigation District

Serving people, agriculture, businesses, and the environment in El Dorado County since 1925

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