

*Strategic Plan*  
*2014*



**Helix Water District**



## **INTRODUCTION**

The Helix Water District board of directors and general manager thank everyone for their participation and contributions toward developing this strategic plan. The board of directors, general manager, management, employees and the community all played an active role in creating this document to provide the vision and chart the future course of our water agency.

A strategic plan is a thoughtful, organized approach to creating plans that move an organization to its desired future. It involves a process of self-examination, addressing of difficult choices and establishment of priorities. Our process began with individual meetings with the board of directors to understand their perspectives regarding the strengths, weaknesses, opportunities and threats for the organization. Management and employees also met to discuss the SWOT as well as the current environment and trends that affect the district. In May 2014, the board of directors met with community members to get their input regarding the district's future strategies and goals.

This plan reaffirms the district's vision, mission and values and outlines seven strategic focus areas. The SFAs reflect the "vital few" business issues that are critical for the district's continued success. Each SFA is described with a brief statement that clarifies its fundamental importance to the district. SFAs are supported by a strategy, which is the primary approach or plan to address the focus area. The strategy is accomplished by three to six key goals that identify specific and measurable results.

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## VALUES OF HELIX WATER DISTRICT

### **Honesty, Trust and Integrity**

Honesty, trust and integrity are the cornerstone of everything we do. We believe that organizational integrity is the result of individual integrity.

### **Commitment to our Employees**

We value each employee's unique contribution to the success of the district. We support our employees through training, development and recognition of their strengths and individual talents.

### **Customer Service**

We value excellent service and those who provide it by listening, anticipating, adapting and responding to our internal and external customer needs.

### **Teamwork**

We recognize the power of teamwork. We are committed to helping each other in the spirit of cooperation to be the best.

### **Responsibility and Accountability**

We are responsible for accomplishing the vision and mission of the district and are accountable to ourselves and each other.

### **Open Communication**

We value two-way communication that is timely, open and honest. We support an environment where people express ideas, listen with respect and provide and receive constructive feedback.

### **Continuous Improvement**

We are committed to continuous improvement. Creativity, innovation and growth assure a dynamic future. We challenge ourselves to improve personally, professionally and organizationally.

### **Leadership**

We value leadership demonstrated by employees who, by example, set standards, inspire coworkers and serve as role models in supporting the vision and mission of the district.

### **Cost-Effective Quality**

We achieve excellence through programs that emphasize cost-effective quality.

◆◆ STRATEGIC FOCUS AREA ◆◆

## CUSTOMER SERVICE

Our mission to provide outstanding service to our customers remains a primary focus area for the district. We understand the importance of providing the best service at the best value for all of our customers. Whether it is answering a question over the phone, providing updated and easy-to-use information on our website, personally helping customers to identify and read their water meters, or promptly responding after hours to repair and restore water service, we are there for our customers, both internal and external.



### STRATEGY

Provide excellent customer service by being understanding, supportive and responsive to our customers' needs.

### GOALS

1. Complete a customer survey every three years to measure the level of customer service provided, and better understand the needs and expectations of our customers. The first survey is to be completed by the end of 2015.
2. Continue to develop customer service standards and metrics for all departments by 2016 and conduct online surveying when new technology allows.
3. As the Enterprise Resource Planning and Enterprise Content Management System are implemented, improve web-based services and online capabilities for our customers by the end of 2017.
4. Develop and maintain a customer service training program to provide our employees with the knowledge, skills and tools to address the current and future needs of our customers by the end of 2015.

## ◆◆ STRATEGIC FOCUS AREA ◆◆

**EMPLOYEES**

Our employees are our most valuable resource and are the foundation of our organization. The district's staff is dedicated and highly experienced. The need to maintain a well-trained and highly skilled workforce is vital to the district's current and future success. As the workforce evolves, regulations change, mandates increase and technology advances, it is imperative that our employees are prepared to deliver the highest quality services for our customers. Hiring, developing and retaining employees ensures that we will continue to meet current and anticipated challenges. Keeping staff trained and up-to-date on critical, cutting edge skills is vital to our continued success.

**STRATEGY**

Recruit, develop and retain a highly skilled and knowledgeable workforce and provide them the resources to meet our customers' and the organization's needs and expectations.

**GOALS**

1. Conduct compensation and benefits survey biannually to ensure the district's compensation package is competitive with surrounding water agencies and municipalities starting March 2014.
2. Develop a formal employee career development program by December 2015 that supports the district's succession planning efforts.
3. Develop an employee mentoring program by December 2016 that utilizes job shadowing and job enrichment to prepare employees for future advancement and career development.

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## FISCAL INTEGRITY AND SUSTAINABILITY

Today's challenging economic environment requires government agencies to be especially fiscally conscious, transparent and financially responsible. In an era of long-running economic uncertainty coupled with increasing costs of water, materials and energy and increased public scrutiny, it is imperative that the district obtain value for every dollar spent and make a clear case why each dollar is needed. An emphasis on efficiency and fiscal responsibility will be promoted throughout the district.

### STRATEGY

Ensure stable rates and sufficient revenues to support the district's operating and capital needs, including adequate resources to support the strategic focus areas in the district's strategic plan.

### GOALS

1. Annually update and implement the five year financial projection and ten year capital improvement program to support long-range planning efforts to sustain fiscal integrity and stability, including maintaining adequate reserves and a bond rating of AA or better.
2. Commission a cost of service study every five years to ensure stability and equitability of water rate structure. The next cost of service study will be completed by the end of 2014.
3. Identify and allocate resources to achieve strategic plan goals and establish an annual budget process to ensure alignment of resources with the plan.
4. Maintain stable water rates to support the operations and maintenance of the district, and adequately fund replacement and upgrades required to ensure service, reliability, and high quality customer service.
5. Continue to explore and consider alternatives to reducing the unfunded liabilities for the retirement benefits system and the retiree health care benefits. Consider establishing a funded level goal for both.
6. Continue to explore ways for the Lake Jennings operations to reduce the operating deficit and become self-sustaining.

## ◆◆ STRATEGIC FOCUS AREA ◆◆

**INFRASTRUCTURE**

A well-maintained infrastructure is critical to ensure quality service delivery. If systems are not kept in good working condition for today's service requirements and expanded in anticipation of tomorrow's demands, reliability suffers and system-wide costs increase. Preventive maintenance and cost-effective repairs result in increased safety, system reliability and decreased operating costs. The district is committed to ensuring a quality, well-maintained infrastructure that meets or exceeds regulatory requirements.

**STRATEGY**

Maintain, adequately fund, upgrade or replace infrastructure at a frequency that minimizes unplanned service disruptions and meets both the near term and future capital needs of the district. Evaluate future sustainable projects that maximize our available resources.

**GOALS**

1. Review the capital improvement program master plan annually to coincide with the CIP fiscal year budgeting process with major updates completed at least once every five years.
2. Budget anticipated and unanticipated infrastructure repairs and replacements to support the CIP master plan on an annual basis.
3. Update the CIP master plan by December 2014 and publish on the district's website.
4. Update the ten year CIP budget projection on an annual basis to develop a cash flow summary of projects and associated funding forecasted within the CIP master plan.
5. Budget and participate in a water reuse feasibility study with our east county co-agency partners.

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## WATER RESOURCES

Water supplies from historical sources are becoming less reliable and dramatically more expensive. We are continually being challenged by climate change, drought, competition over water rights, increasing environmental regulations and other forces beyond the district's control. Supporting the diversification of our region's water supply will enable the district to predict supply and costs with greater certainty, thereby continuing to provide the best and most reliable services to our customers.



### STRATEGY

Maintain a diverse, sustainable and reliable water supply with exceptional treated water quality.

### GOALS

1. Complete a feasibility study of potable reuse as a supply to Lake Jennings and the R.M. Levy Water Treatment Plant by the end of 2016.
2. Expand the water conservation program to achieve a sustainable dry year target of 114 gallons per capita per day by the end of 2015.
3. Prepare and implement a reservoir operations plan with the goal of reducing average evaporative losses by the end of 2016.

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## OPTIMIZING TECHNOLOGY

Technology is rapidly evolving and the best organizations excel by updating and integrating new technology to provide the best possible service to their customers. The district and its highly skilled and trained technology team are committed to continually monitor our technology applications and ensure that new systems are appropriate for our specific needs. We provide our employees with up-to-date training to ensure the best and highest use of new technologies.



### STRATEGY

Maintain a workforce that is equipped and trained in the use of appropriate and advanced technology to enhance customer service, efficiency and effectiveness.

### GOALS

1. Implement critical application modules to support the district's Enterprise Resource Planning and implement an Enterprise Content Management System by the end of 2017.
2. Develop and implement an information systems master plan by end of 2015.
3. Assess the sustainability of the Smallworld GIS platform in relation to the new ERP, and include in the information systems master plan by the end of 2015.

## ◆◆ STRATEGIC FOCUS AREA ◆◆

**PUBLIC EDUCATION AND OUTREACH**

The public is demanding more accountability of its government agencies and public scrutiny has never been higher. While the public values water, as rates rise, ratepayers have more questions. We need to ensure that our customers understand the district, the services it provides and the complexities of our region's water industry. With a better understanding of the infrastructure required to deliver high quality water, the complex operations and treatment processes, and the challenges our industry faces, customers will have a greater appreciation for infrastructure improvements and major investments that are essential to providing safe, reliable high quality water.

**STRATEGY**

Develop an active public education and outreach program that promotes Helix Water District and effectively communicates the complexities of the water industry and the value of water resources in our region.

**GOALS**

1. Develop a public education marketing plan to include workshops and educational materials by December 2014. The public education and marketing plan will include items such as: information regarding the value of water, the district's rate structure and cost of water, the unfunded liabilities and efforts to reduce them, and employee benefits.
2. Utilize social media and speakers' bureau to communicate the district's key messages.
3. Upgrade the district's website to be intuitive, customer friendly, and include interactive educational feature stories and videos on current topics with links to social media updates by the end of 2015.



Helix Water District's board of directors, from left, Joel Scalzitti, Vice President DeAna Verbeke, President Chuck Muse, Kathleen Coates Hedberg and John Linden.

## **ACKNOWLEDGMENTS**

The Strategic Plan 2014 was made possible by the support of the board of directors and the leadership team of the Helix Water District. Our district employees and customers provided significant insight and feedback to ensure the strategic plan is realistic and on target. The community members helped to ensure that the ratepayers' perspective was also represented in the strategic plan, making it a valuable tool for all stakeholders.

Thank you for the contributions and support of district employees whose dedication and hard work have created this outstanding organization and are key to developing and implementing the strategic plan. We also want to acknowledge the Tamayo Group, especially Michele Tamayo who provided consulting services and guidance to help create the strategic plan.