

Helix Water District - Strategic Work Plan

Strategic Focus Area 1 - Customer Service

Goal: 1.3 - 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.

Objective: (a) **1.3 - Explore ways to increase customer use of online bill pay services including eBill enrollment.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Annual Objective. Continue to increase by an additional 20 percent by the end of the next fiscal year.

Objective: (b) *1.3 - Continue looking for ways to increase customer use of online billing and payment system including eBill enrollment (customer outreach through email, contact with customer service representatives, text messaging).*

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Continue to increase by an additional 20 percent by the end of the next fiscal year. Additionally, current Cayenta upgrade project will increase the usability of the Cayenta mobile application. Anticipated completion in November 2019.

Goal: 1.5 - General - Customer Service

Objective: (a) *1.5 - Upgrade and reconfigure Cayenta system to support Senate Bill 998 legislation.*

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: System upgrade due to be completed by November 2019.

Strategic Focus Area 2 - Employees

Goal: 2.1 - Conduct compensation and benefits survey biannually to ensure the district's compensation package is competitive with surrounding water agencies and municipalities starting March 2014.

Objective: (a) **2.1 - Work with consultant to conduct a compensation study.**

Completed

Department: Administrative Services Fiscal Year: 2017-18 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Completed by Rewards Strategy Group and presented to the board and the public in March 2019.

Strategic Focus Area 2 - Employees (continued)

Goal: 2.4 - General - Employees

Completed	<i>Objective:</i> (a) 2.4 - Work with Water Utilities Safety Managers Association and complete district specific Silica Safety Program to comply with Cal/OSHA regulations.	<u>Department:</u> Operations	<u>Fiscal Year:</u> 2018-19	<u>Due Date:</u> 6/30/2019	<u>% Complete:</u> 100
	Comments/Notes:				
New	<i>Objective:</i> (b) 2.4 - Coordinate outside trainers to conduct Sexual Harassment Prevention Training to supervisors (2 hours) and non-supervisors (1 hour) per California Senate Bill 1343.	<u>Department:</u> Human Resources	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 1/1/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (c) 2.4 - Complete a succession plan with each member of the executive team.	<u>Department:</u> Human Resources	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (d) 2.4 - Review all safety programs that were not reviewed in fiscal year 2018-19 and update as necessary.	<u>Department:</u> Operations	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (e) 2.4 - Continue the formal employee career development program that supports the district's succession planning efforts.	<u>Department:</u> Human Resources	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (f) 2.4 - Develop and implement a benefit outreach training program to educate staff on district benefits.	<u>Department:</u> Human Resources	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				

Strategic Focus Area 3 - Fiscal Integrity & Sustainability

Goal: 3.1 - 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.

Strategic Focus Area 3 - Fiscal Integrity & Sustainability (continued)

Objective: (a) 3.1 - Annually update and implement the five-year projection and ten-year capital improvement program to support long-range planning.

In Progress

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 8/30/2019 % Complete: 90

Comments/Notes: Annual Objective. Work commences during budget process in March 2019 for August 2019 completion. Five-year water rate projection workshop held on May 15, 2019 and fiscal year 2019-20 budget approved by the board on June 5, 2019. Final fiscal year 2019-20 water rate update will be brought to the board for approval on August 7, 2019.

Objective: (b) 3.1 - Annually update and implement the five-year projection and ten-year capital improvement program to support long-range planning.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 8/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Work commences during budget process in March 2020 for August 2020 completion.

Goal: 3.3 - Identify and allocate resources to achieve strategic plan goals and establish an annual budget process to ensure alignment of resources with the plan.

Objective: (a) 3.3 - Annually identify and allocate resources to achieve strategic plan goals and ensure those resources are reflected in the annual budget.

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 8/30/2019 % Complete: 100

Comments/Notes: Completed Annual Objective.

Objective: (b) 3.3 - Annually identify and allocate resources to achieve strategic plan goals and ensure those resources are reflected in the annual budget.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 8/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Board approved fiscal year 2019-20 budget on June 5, 2019, which included funds needed to meet strategic plan goals reflected in this document.

Goal: 3.4 - 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.

Strategic Focus Area 3 - Fiscal Integrity & Sustainability (continued)

Objective: (a) 3.4 - Maintain stable water rates to support the operations and maintenance of the district, and adequately fund replacement and upgrades as well as reserves.

In Progress

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 8/30/2019 % Complete: 90

Comments/Notes: Annual Objective. Five-year water rate projection workshop held on May 15, 2019 and fiscal year 2019-20 budget approved by the board on June 5, 2019. Final fiscal year 2019-20 water rate update will be brought to the board for approval on August 7, 2019.

Objective: (b) 3.4 - Maintain stable water rates to support the operations and maintenance of the district, and adequately fund replacement and upgrades as well as reserves.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 8/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Rate analysis is performed during budget process beginning in March 2020 for August 2020 completion. The district will engage a third-party consultant to provide an updated cost-of-service study in fiscal year 2019-20.

Goal: 3.5 - 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.

Objective: (a) 3.5 - Continue to explore and consider alternatives to reducing the unfunded liabilities for the retirement benefits system and the retiree health care benefits.

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: **100**

Comments/Notes: Annual Objective. Analysis performed during the fall of 2018 through early 2019 regarding the impact of a large, lump sum payment of the district's unfunded pension liability. Staff worked with CalPERS and an outside consultant to make a recommendation to the board in February 2019. Board accepted the recommendation and the district made a one-time \$5.0 million prepayment of the district's unfunded liability in February 2019, reducing the district's unfunded liability and increasing its funding percentage.

Objective: (b) 3.5 - Continue to explore and consider alternatives to reducing the unfunded liabilities for the retirement benefits system and the retiree health care benefits.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective.

Goal: 3.7 - General - Fiscal Integrity and Sustainability

Objective: (a) 3.7 - LED lighting retrofit at facilities.

Completed

Department: Operations Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: **100**

Comments/Notes:

Strategic Focus Area 3 - Fiscal Integrity & Sustainability (continued)

	Objective:	(b) 3.7 - Create Energy Star baselines for the administration office and the operations center.							
Completed		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(c) 3.7 - Perform random testing of 10 percent (300) meters (1-inch and smaller) changed out in the meter replacement program and track program effectiveness and accuracy compliance with AWWA C700.							
Completed		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes: Annual Objective.							
	Objective:	(d) 3.7 - Test and calibrate all 3-inch and larger meters.							
Completed		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes: Annual Objective.							
	Objective:	(e) 3.7 - Complete administration office landscape design.							
Completed		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(f) 3.7 - Complete consultant review of energy management practices.							
Completed		Department:	Water Quality	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(g) 3.7 - Prepare vault documents for protected off-site storage; purge duplicate files and maintain an inventory list, allowing reorganization of the vault.							
Completed		Department:	Administrative Services	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes: Completed.							
	Objective:	(h) 3.7 - Continue to improve the budget document in conjunction with implementation of the new financial reporting system using guidance from GFOA.							
In Progress		Department:	Administrative Services	Fiscal Year:	2017-18	Due Date:	6/30/2020	% Complete:	50
		Comments/Notes: District staff to continue to migrate towards this format with the fiscal year 2020-21 budget as the goal for this new format. Adding additional columns for actual fiscal year results to the budget document in the fiscal year 2019-20 budget, per GFOA requirements.							

Strategic Focus Area 3 - Fiscal Integrity & Sustainability (continued)

Objective: (i) 3.7 - Perform random testing of 10 percent (300) meters (1-inch and smaller) changed out in the meter replacement program and track program effectiveness and accuracy compliance with AWWA C700.

New

Department: Operations Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective.

Objective: (j) 3.7 - Test and calibrate all 3-inch and larger meters.

New

Department: Operations Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective.

Objective: (k) 3.7 - Complete administration office landscape construction.

New

Department: Operations Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes:

Strategic Focus Area 4 - Infrastructure

Goal: 4.1 - Review the capital improvement program master plan annually to coincide with the capital improvement program fiscal year budgeting process with major updates completed at least once every five years.

Objective: (a) 4.1 - Review the capital improvement program master plan annually to coincide with the capital improvement program fiscal year budgeting process with major updates completed at least once every five years.

Completed

Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Annual Objective.

Objective: (b) 4.1 - Review the capital improvement program master plan annually to coincide with the capital improvement program fiscal year budgeting process with major updates completed at least once every five years.

New

Department: Engineering Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective. The district is contracting with a third-party consultant to update its capital improvement program master plan in fiscal year 2019-20.

Goal: 4.2 - Budget anticipated and unanticipated infrastructure repairs and replacements to support the capital improvement program master plan on an annual basis.

Objective: (a) 4.2 - Upgrade power source for individual motor control center buckets at two pump stations.

Completed

Department: Water Quality Fiscal Year: 2013-14 Due Date: 6/30/2019 % Complete: 100

Comments/Notes:

Strategic Focus Area 4 - Infrastructure (continued)

	Objective:	(b) 4.2 - Turn 8,758 valves to maintain the district's valve turning cycle at 18-22 months.			
Completed		<u>Department:</u> Operations	<u>Fiscal Year:</u> 2018-19	<u>Due Date:</u> 6/30/2019	<u>% Complete:</u> 100
		Comments/Notes: Annual Objective.			
	Objective:	(c) 4.2 - Replace a minimum of 100 small gate valves (4-14 inches) in accordance with the district's capital improvement program master plan.			
		<u>Department:</u> Operations	<u>Fiscal Year:</u> 2018-19	<u>Due Date:</u> 6/30/2019	<u>% Complete:</u> 78
		Comments/Notes: Annual Objective. Incomplete due to completion of higher-priority work.			
	Objective:	(d) 4.2 - Upgrade or abandon 32 substandard blow-offs in accordance with the district's distribution system improvements program.			
		<u>Department:</u> Operations	<u>Fiscal Year:</u> 2018-19	<u>Due Date:</u> 6/30/2019	<u>% Complete:</u> 69
		Comments/Notes: Annual Objective. Incomplete due to completion of higher-priority work.			
	Objective:	(e) 4.2 - Replace 74 plastic water service laterals with copper in accordance with the district's distribution system improvements program.			
		<u>Department:</u> Operations	<u>Fiscal Year:</u> 2018-19	<u>Due Date:</u> 6/30/2019	<u>% Complete:</u> 82
		Comments/Notes: Annual Objective. Incomplete due to completion of higher-priority work.			
	Objective:	(f) 4.2 - Upgrade four pressure system interconnects in accordance with the district's distribution system improvements program.			
		<u>Department:</u> Operations	<u>Fiscal Year:</u> 2018-19	<u>Due Date:</u> 6/30/2019	<u>% Complete:</u> 50
		Comments/Notes: Annual Objective. Incomplete due to completion of higher-priority work.			
	Objective:	(g) 4.2 - Replace 42-inch flume valve actuator and move controls above ground.			
In Progress		<u>Department:</u> Water Quality	<u>Fiscal Year:</u> 2017-18	<u>Due Date:</u> 3/1/2020	<u>% Complete:</u> 90
		Comments/Notes: Work in progress.			
	Objective:	(h) 4.2 - Complete rehabilitation of valves and piping in the Cuyamaca vault.			
In Progress		<u>Department:</u> Water Quality	<u>Fiscal Year:</u> 2017-18	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
		Comments/Notes: Delayed for higher priority projects.			

Strategic Focus Area 4 - Infrastructure (continued)

	<i>Objective:</i>	<i>(i) 4.2 - Integrate building management system district-wide.</i>						
In Progress	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2017-18	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	80
	<u>Comments/Notes:</u>	Pending completion of treatment plant roof and HVAC replacement.						
	<i>Objective:</i>	<i>(j) 4.2 - Complete annual projects indentified in the ten-year capital improvement program budget projection.</i>						
Completed	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2018-19	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	100
	<u>Comments/Notes:</u>	Annual Objective.						
	<i>Objective:</i>	<i>(k) 4.2 - Turn 8,758 valves to maintain the district's valve turning cycle at 18-22 months.</i>						
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>	Annual Objective.						
	<i>Objective:</i>	<i>(l) 4.2 - Complete annual projects indentified in the ten-year capital improvement program budget projection.</i>						
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>	Annual Objective.						
	<i>Objective:</i>	<i>(m) 4.2 - Replace a minimum of 45 small gate valves (4-14 inches) in accordance with the district's capital improvement program master plan.</i>						
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>	Annual Objective.						
	<i>Objective:</i>	<i>(n) 4.2 - Upgrade or abandon 32 substandard blow-offs in accordance with the district's distribution system improvements program.</i>						
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>	Annual Objective.						
	<i>Objective:</i>	<i>(o) 4.2 - Replace 74 plastic water service laterals with copper in accordance with the district's distribution system improvements program.</i>						
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>	Annual Objective.						

Strategic Focus Area 4 - Infrastructure (continued)

Objective: (p) 4.2 - Upgrade three pressure system interconnects in accordance with the district's distribution system improvements program.

New Department: Operations Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0
Comments/Notes: Annual Objective.

Goal: 4.4 - Update the ten-year capital improvement program budget projection on an annual basis to develop a cash flow summary of projects and associated funding forecasted within the CIP master plan.

Objective: (a) 4.4 - Update the ten-year capital improvement program budget projection on an annual basis to develop a cash flow summary of projects and associated funding forecasted within the capital improvement program master plan.

Completed Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100
Comments/Notes: Annual Objective.

Objective: (b) 4.4 - Update the ten-year capital improvement program budget projection on an annual basis to develop a cash flow summary of projects and associated funding forecasted within the capital improvement program master plan.

New Department: Engineering Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0
Comments/Notes: Annual Objective.

Goal: 4.5 - General - Infrastructure

Objective: (a) 4.5 - Complete evaluation and repairs to chlorine scrubber.

Completed Department: Water Quality Fiscal Year: 2018-19 Due Date: 4/30/2019 % Complete: 100
Comments/Notes:

Objective: (b) 4.5 - Complete final phase of treatment plant security camera improvement project.

Completed Department: Water Quality Fiscal Year: 2018-19 Due Date: 5/30/2019 % Complete: 100
Comments/Notes:

Objective: (c) 4.5 - Research, identify, test and purchase new meter read handheld devices including developing interface with Cayenta CU system.

Completed Department: Administrative Services Fiscal Year: 2015-16 Due Date: 6/30/2019 % Complete: 100
Comments/Notes: New meter reading infrastructure and software has been deployed. Currently testing smartphone and tablet devices in the field.

Strategic Focus Area 4 - Infrastructure (continued)

	Objective:	(d) 4.5 - Upgrade Helix 1B and Helix 2 Programmable Logic Controllers (PLC) and panels.							
Completed		Department:	Water Quality	Fiscal Year:	2015-16	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(e) 4.5 - Update property boundary information for weed abatement master list (35 total).							
Completed		Department:	Engineering	Fiscal Year:	2016-17	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes: 35 of 35 are complete.							
	Objective:	(f) 4.5 - Prepare predesign report for transmission main condition assessment.							
Completed		Department:	Engineering	Fiscal Year:	2017-18	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(g) 4.5 - Evaluate lake boat dock for repair or rehabilitation estimate.							
Completed		Department:	Water Quality	Fiscal Year:	2017-18	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(h) 4.5 - Conduct an emergency operations exercise to test the district's ability to respond to an unforeseen event.							
Completed		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes: Annual Objective.							
	Objective:	(i) 4.5 - Complete Well 101 Rehabilitation.							
Completed		Department:	Water Quality	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes:							
	Objective:	(j) 4.5 - Replace 3,000 [1 inch and smaller]; 163 [1-1/2 inch to 2 inch]; and 2 [3 inch+] meters in accordance with the district's meter replacement program.							
Completed		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	100
		Comments/Notes: Annual Objective.							
	Objective:	(k) 4.5 - Identify and abandon two substandard pipeline easements.							
		Department:	Operations	Fiscal Year:	2018-19	Due Date:	6/30/2019	% Complete:	50
		Comments/Notes: Annual Objective. Incomplete due to completion of higher-priority work.							

Strategic Focus Area 4 - Infrastructure (continued)

	<i>Objective:</i>	<i>(l) 4.5 - Complete quitclaims based on annual objectives.</i>						
Completed	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2018-19	<u>Due Date:</u>	6/30/2019	<u>% Complete:</u>	100
		<u>Comments/Notes:</u> Annual Objective.						
	<i>Objective:</i>	<i>(m) 4.5 - Complete Phase 1 of Self-Contained Breathing Apparatus plan.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	11/30/2019	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						
	<i>Objective:</i>	<i>(n) 4.5 - Recalibrate hydraulic model to be compatible with Esri/GIS.</i>						
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	12/1/2019	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						
	<i>Objective:</i>	<i>(o) 4.5 - Pilot study/replacement of one individual backwash valve actuator.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	12/31/2019	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						
	<i>Objective:</i>	<i>(p) 4.5 - Complete capital improvement program master plan update.</i>						
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	2/1/2020	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						
	<i>Objective:</i>	<i>(q) 4.5 - Replace one chlorinator unit.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	3/1/2020	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						
	<i>Objective:</i>	<i>(r) 4.5 - Install safety gates on the elevated platforms at Johnstown, Bostonia, Tunnel Hill 2, Greenfield and Clearwell tanks concurrent with the fiscal year 2019-20 planned tank inspections.</i>						
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	3/31/2020	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						
	<i>Objective:</i>	<i>(s) 4.5 - Replace screw pump gear box.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	4/1/2020	<u>% Complete:</u>	0
		<u>Comments/Notes:</u>						

Strategic Focus Area 4 - Infrastructure (continued)

	<i>Objective:</i>	<i>(t) 4.5 - Repair/rehabilitate roof at Well 101.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	4/30/2020	<u>% Complete:</u>	0
		Comments/Notes:						
	<i>Objective:</i>	<i>(u) 4.5 - Repair/rehabilitate roof at Dictionary Hill pump station.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	4/30/2020	<u>% Complete:</u>	0
		Comments/Notes:						
	<i>Objective:</i>	<i>(v) 4.5 - Replace five pump control valves at Lubbock and Helix 3 pump stations.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	5/31/2020	<u>% Complete:</u>	0
		Comments/Notes:						
	<i>Objective:</i>	<i>(w) 4.5 - Engage consultant, complete Risk and Resilience Assessment and submit certification to Environmental Protection Agency in accordance with requirements of Title 42, Section 300i-2.</i>						
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	5/31/2020	<u>% Complete:</u>	0
		Comments/Notes:						
	<i>Objective:</i>	<i>(x) 4.5 - Ozone power supply unit/inverter replacement.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/1/2020	<u>% Complete:</u>	0
		Comments/Notes:						
	<i>Objective:</i>	<i>(y) 4.5 - Install automatic transfer switch at Windsor Hills pump station.</i>						
New	<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/15/2020	<u>% Complete:</u>	0
		Comments/Notes:						
	<i>Objective:</i>	<i>(z) 4.5 - Develop a new cathodic protection annual report format to be compatible with the work management system in GIS.</i>						
In Progress	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2012-13	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	10
		Comments/Notes: Pending ERP Phase 3/GIS upgrade.						
	<i>Objective:</i>	<i>(aa) 4.5 - Conduct an emergency operations exercise to test the district's ability to respond to an unforeseen event.</i>						
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	6/30/2020	<u>% Complete:</u>	0
		Comments/Notes: Annual Objective.						

Strategic Focus Area 4 - Infrastructure (continued)

	<i>Objective:</i>	<i>(bb) 4.5 - Complete quitclaims based on annual objectives, which include obsolete easements due to pipeline replacement projects.</i>			
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>	Annual Objective.			
	<i>Objective:</i>	<i>(cc) 4.5 - Perform stray current testing on buried metallic facilities near known locations of SDG&E rectifiers and develop mitigation strategies as necessary.</i>			
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>				
	<i>Objective:</i>	<i>(dd) 4.5 - Replace 3,000 [1 inch and smaller]; 163 [1-1/2 inch to 2 inch]; and 2 [3 inch+] meters in accordance with the district's meter replacement program.</i>			
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>	Annual Objective.			
	<i>Objective:</i>	<i>(ee) 4.5 - Identify and abandon one substandard pipeline easement.</i>			
New	<u>Department:</u>	Operations	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>	Annual Objective.			

Strategic Focus Area 5 - Water Resources

Goal: 5.2 - Expand the water conservation program to achieve a sustainable dry year target of 114 gallons per capita per day by the end of 2015.

	<i>Objective:</i>	<i>(a) 5.2 - Ensure the district remains in compliance with current State Water Resources Control Board and Department of Water Resources regulations with respect to reporting water use and related data.</i>			
Completed	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2018-19	<u>Due Date:</u> 6/30/2019 <u>% Complete:</u> 100
	<u>Comments/Notes:</u>	Annual Objective. Continue to submit water use data on a monthly basis.			
	<i>Objective:</i>	<i>(b) 5.2 - Continue to monitor proposed state regulations to continue to advocate on behalf of the district's ratepayers and to evaluate the impact new regulations may have on district customers.</i>			
Completed	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2018-19	<u>Due Date:</u> 6/30/2019 <u>% Complete:</u> 100
	<u>Comments/Notes:</u>	Annual Objective. Staff is monitoring regulations and writing comment letters and board resolutions as needed. Staff is also participating in Department of Water Resources and State Water Resources Control Board's workshops regarding long-term water use efficiency measures and water loss standards. Also monitoring the impact of Senate Bill 998, customer shutoff legislation with ACWA and Best Best and Krieger.			

Strategic Focus Area 5 - Water Resources (continued)

Objective: (c) 5.2 - Ensure the district remains in compliance with current State Water Resources Control Board and Department of Water Resources regulations with respect to reporting water use and related data.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Continue to submit water use data on a monthly basis.

Objective: (d) 5.2 - Continue to monitor proposed state regulations to continue to advocate on behalf of the district's ratepayers and to evaluate the impact new regulations may have on district customers.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Staff is monitoring regulations and writing comment letters and board resolutions as needed. Staff is also participating in Department of Water Resources and State Water Resources Control Board's workshops regarding long-term water use efficiency measures and water loss standards.

Goal: 5.4 - General - Water Resources

Objective: (a) **5.4 - Complete second-term technical study work for East County Advanced Water Purification project.**

Completed

Department: Water Quality Fiscal Year: 2018-19 Due Date: 3/31/2019 % Complete: 100

Comments/Notes:

Objective: (b) 5.4 - Complete inundation mapping for Cuyamaca and update Emergency Action Plan as it relates to dam emergencies.

In Progress

Department: Water Quality Fiscal Year: 2018-19 Due Date: 1/1/2020 % Complete: 90

Comments/Notes: Inundation maps are complete and under review by Division of Safety of Dams. Emergency Action Plans for Chet Harritt and Cuyamaca dams submitted and are under review by CalOES.

Objective: (c) 5.4 - Develop and implement water quality and treatment optimization plan to address source water quality change.

In Progress

Department: Water Quality Fiscal Year: 2017-18 Due Date: 1/31/2020 % Complete: 90

Comments/Notes: Report is complete and routing for technical review.

Objective: (d) 5.4 - Develop final determination on participation in East County Advanced Water Purification project.

In Progress

Department: Water Quality Fiscal Year: 2018-19 Due Date: 6/30/2020 % Complete: 75

Comments/Notes: Pending new work and agreements. Final determination expected by March 2021.

Strategic Focus Area 6 - Optimizing Technology

Goal: 6.2 - Develop and implement an information systems master plan by the end of 2015.

Objective: (a) *6.2 - Retain consultant and develop information systems master plan.*

In Progress

Department: Administrative Services Fiscal Year: 2014-15 Due Date: 12/31/2020 % Complete: 5

Comments/Notes: Will pursue in fiscal year 2020-21 after the completion of Phase 3 of the enterprise resource planning replacement project.

Goal: 6.4 - General - Optimizing Technology

Objective: (a) *6.4 - Increase the number of articles in the information services knowledgebase by 50 percent.*

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 3/1/2019 % Complete: 100

Comments/Notes: Information services maintains an elaborate knowledgebase with articles ranging from hardware to software installations to step by step break/fix solutions.

Objective: (b) *6.4 - Develop variables, entry forms, reports and interfaces in WIMS to improve efficiency of systems reporting.*

Completed

Department: Water Quality Fiscal Year: 2017-18 Due Date: 5/1/2019 % Complete: 100

Comments/Notes:

Objective: (c) *6.4 - Implement the equivalent of GETS on the district's cellular service.*

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 5/1/2019 % Complete: 100

Comments/Notes: Implement a priority call service such as the district's existing Government Emergency Telecommunications Service on a subset of existing cellular devices. Verizon has now streamlined this process and it is now available at no cost.

Objective: (d) *6.4 - Replace 3G devices with 4G LTE devices in support of the Verizon retirement of 3G service in 2019.*

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 5/30/2019 % Complete: 100

Comments/Notes: Verizon is scheduled to retire 3G service across the nation starting in 2019. This includes feature phones, smart devices and portable wireless hotspots. Three 3G devices remain and are in progress.

Objective: (e) *6.4 - Implement enterprise resource planning system as part of Phase 2 of the HP replacement project covering finance, accounting, inventory, human resources and payroll functions.*

Completed

Department: Administrative Services Fiscal Year: 2017-18 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Human resources training modules to be further refined through September 2019.

Strategic Focus Area 6 - Optimizing Technology (continued)

Objective: (f) **6.4 - Continue to scan all active capital project work orders, planning files, right of way office documents, board packages, minutes, contracts and agreements, resolutions and election materials into OnBase.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Annual Objective. Active documents will continue to be scanned as an ongoing process.

Objective: (g) **6.4 - Research, evaluate and, if feasible, begin the development of a shutdown management solution for ArcGIS.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Implemented web-based solution to analyze and notify shutdowns. Will be continually improved and updated.

Objective: (h) **6.4 - Using the Esri Enterprise Advantage Program, develop a technical work plan to further scale and deploy the ArcGIS environment to district GIS users.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: 12-month subscription to Esri Enterprise Advantage Program. Technical work plan delivered in October 2018.

Objective: (i) **6.4 - Research and evaluate upgrading the Cayenta Utilities environment to version 7.9 or 9.0.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Upgrade scheduled for completion in November 2019.

Objective: (j) **6.4 - Complete GPS survey inventory of district facilities including tanks, reservoirs and pump stations.**

Completed

Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes:

Objective: (k) **6.4 - Review and update scan quality of GIS associated as-built drawings from the engineering files.**

Completed

Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes:

Objective: (l) **6.4 - Continue to refine the district's document retention and destruction schedule to include the electronic content management system and electronically set purge dates.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Schedule is complete, vetted through district counsel and board approved. Custodian of public records is working with information services to test the electronic purge dates.

Strategic Focus Area 6 - Optimizing Technology (continued)

	<i>Objective:</i>	<i>(m) 6.4 - Upgrade Field Collection System to the latest version, in both test and production, for the continued progression of mobile meter reading.</i>						
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	8/30/2019	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>							
	<i>Objective:</i>	<i>(n) 6.4 - Retire legacy HP server hardware and continue to provide access to HP data.</i>						
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	9/27/2019	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>							
	<i>Objective:</i>	<i>(o) 6.4 - Deploy mobile tablet devices for all field inspectors for the written and photographic documentation of all capital and private development project activities for direct upload into OnBase.</i>						
New	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	9/30/2019	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>							
	<i>Objective:</i>	<i>(p) 6.4 - Upgrade backup media agent servers at all three district locations.</i>						
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	10/26/2019	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>							
	<i>Objective:</i>	<i>(q) 6.4 - Upgrade all district smart devices that do not meet the iOS 13 minimum requirements.</i>						
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	10/31/2019	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>							
	<i>Objective:</i>	<i>(r) 6.4 - Migrate the customer self-service web portal to a responsive design web framework as part of the Cayenta Utilities 9.0 upgrade.</i>						
In Progress	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2017-18	<u>Due Date:</u>	12/31/2019	<u>% Complete:</u>	5
	<u>Comments/Notes:</u>	To be completed in November 2019.						
	<i>Objective:</i>	<i>(s) 6.4 - Complete an upgrade to Cayenta Utilities 9.0 including changes to the customer self-service website and support for the provisions of Senate Bill 998 (Water Shutoff Protection Act).</i>						
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u>	12/31/2019	<u>% Complete:</u>	0
	<u>Comments/Notes:</u>	Cayenta services contract and capital appropriation approved by the board. Project kick-off - July 3, 2019.						

Strategic Focus Area 6 - Optimizing Technology (continued)

	<i>Objective:</i>	<i>(t) 6.4 - Update all planning forms to reflect current Tyler Munis-based processes.</i>				
New		<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 12/31/2019 <u>% Complete:</u> 0
		Comments/Notes:				
	<i>Objective:</i>	<i>(u) 6.4 - Complete an upgrade to the latest stable version of Esri ArcGIS Enterprise, currently version 10.7. Conduct regression testing on published services and deploy new features to improve overall performance of GIS.</i>				
New		<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 1/31/2020 <u>% Complete:</u> 0
		Comments/Notes:				
	<i>Objective:</i>	<i>(v) 6.4 - Review and update the Computer Use Policy to stay current and accurately reflect district policies.</i>				
New		<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 1/31/2020 <u>% Complete:</u> 25
		Comments/Notes: Periodic review and revision.				
	<i>Objective:</i>	<i>(w) 6.4 - Upgrade all district desktops and laptops to Windows 10 prior to the end of life for Windows 7.</i>				
New		<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 1/31/2020 <u>% Complete:</u> 35
		Comments/Notes: Based on Microsoft sunsetting Windows 7.				
	<i>Objective:</i>	<i>(x) 6.4 - Plan, perform and upgrade the XC2 Backflow to the new version, Sequoia.</i>				
In Progress		<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2018-19	<u>Due Date:</u> 3/31/2020 <u>% Complete:</u> 0
		Comments/Notes: Will require testing and involvement by cross-connection, customer service and GIS staff. Moved because of Cayenta Utilities 9.0 upgrade.				
	<i>Objective:</i>	<i>(y) 6.4 - Review and implement all necessary AWIA regulations that apply to information technology.</i>				
New		<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 3/31/2020 <u>% Complete:</u> 0
		Comments/Notes:				
	<i>Objective:</i>	<i>(z) 6.4 - Identify and evaluate advanced locations tracking, routing and documentation software/procedures.</i>				
In Progress		<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2014-15	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 25
		Comments/Notes: Pending ERP Phase 3/GIS upgrade.				
	<i>Objective:</i>	<i>(aa) 6.4 - Implement remote monitoring of Lake Cuyamaca flow and level measurement.</i>				
In Progress		<u>Department:</u>	Water Quality	<u>Fiscal Year:</u>	2016-17	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 80
		Comments/Notes: Level sensor installation and integration into NOAA data is pending.				

Strategic Focus Area 6 - Optimizing Technology (continued)

	<i>Objective:</i>	<i>(bb) 6.4 - Acquire GPS coordinate information for easement and main transmission line patrol routes and associate with GIS.</i>			
In Progress	<u>Department:</u>	Engineering	<u>Fiscal Year:</u>	2016-17	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 10
	<u>Comments/Notes:</u>	Pending ERP Phase 3/GIS upgrade.			
	<i>Objective:</i>	<i>(cc) 6.4 - Continue to expand the use of the Enterprise Content Management System as identified by consultant, ThirdWave.</i>			
In Progress	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2018-19	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 25
	<u>Comments/Notes:</u>	Working through multi-year plan to complete the scanning of all administration office paper documents located in the vault area. Once complete, all other administration office, operations center and treatment plant documents will be addressed.			
	<i>Objective:</i>	<i>(dd) 6.4 - Complete a Utility Network Assessment with Esri consultants to gauge the level of effort it will take to migrate the district's Esri Geometric Network to the Utility Network. Plan, design and test migrating GIS data, applications and data capture workflows to the Utility Network.</i>			
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>	Anticipate deploying Utility Network to production in fiscal year 2020-21 as a separate objective.			
	<i>Objective:</i>	<i>(ee) 6.4 - Research, survey and evaluate enterprise asset management solutions and how they are deployed in a public utility environment. Evaluate benefits, costs and resources required to maintain EAM system.</i>			
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>	Anticipate a recommendation to be made in fiscal year 2020-21.			
	<i>Objective:</i>	<i>(ff) 6.4 - Deploy Mobile Device Management across all district-issued smart devices.</i>			
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 15
	<u>Comments/Notes:</u>				
	<i>Objective:</i>	<i>(gg) 6.4 - Implement use of mobile phones as an alternate reading device.</i>			
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>				
	<i>Objective:</i>	<i>(hh) 6.4 - Evaluate using Esri system to track and redesign the read reroutes to improve efficiency.</i>			
New	<u>Department:</u>	Administrative Services	<u>Fiscal Year:</u>	2019-20	<u>Due Date:</u> 6/30/2020 <u>% Complete:</u> 0
	<u>Comments/Notes:</u>				

Strategic Focus Area 6 - Optimizing Technology (continued)

New	<i>Objective:</i> (ii) 6.4 - Evaluate using Esri system for the meter maintenance service orders.	<u>Department:</u> Administrative Services	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (jj) 6.4 - Maintain document inventory list, allowing for reorganization of the vault to mirror the board-approved retention and destruction schedule.	<u>Department:</u> Administrative Services	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (kk) 6.4 - Complete the development of the district's electronic content management system document retention and destruction schedule to include procedures and workflow for electronic purging of files and prepare vault documents for offsite scanning including barcodes and the removal of any duplicate files.	<u>Department:</u> Administrative Services	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (ll) 6.4 - Continue to scan all active capital project work orders, planning files, right of way documents, board packages, minutes, contracts/agreements, resolutions and election materials into OnBase and complete reorganization of the engineering archive room including the retention/destruction of the as-built Mylars and microfilm.	<u>Department:</u> Administrative Services	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes: Annual Objective.				
New	<i>Objective:</i> (mm) 6.4 - Update all planning forms, process information and layout on Helix Water District website.	<u>Department:</u> Engineering	<u>Fiscal Year:</u> 2019-20	<u>Due Date:</u> 6/30/2020	<u>% Complete:</u> 0
	Comments/Notes:				
New	<i>Objective:</i> (nn) 6.4 - Complete an upgrade to the latest stable version of Tyler-Munis. Conduct application and workflow testing, update user manuals and provide end-user training to the organization.	<u>Department:</u> Administrative Services	<u>Fiscal Year:</u> 2020-21	<u>Due Date:</u> 10/31/2020	<u>% Complete:</u> 0
	Comments/Notes: Anticipate deploying Tyler-Munis version 2019.x.				

Strategic Focus Area 7 - Public Education & Outreach

Goal: 7.1 - Develop a public education marketing plan to include workshops and educational materials. 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.

Strategic Focus Area 7 - Public Education & Outreach (continued)

Objective: (a) **7.1 - Continue to educate district ratepayers on the value and cost of water via the district's website, materials, classes and other educational events.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Annual Objective.

Objective: (b) **7.1 - Focus on community engagement through the district's Water Talks, Helix Helps, social media and community presentation/outreach programs to educate customers regarding the district's operation and the people, process and cost of providing water 24/7, 365 days a year.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Annual Objective. Active presence on social media. In fiscal year 2018-19, conducted three Water Talks; four Helix Helps events; two WaterSmart Landscape Workshops; one WaterSmart Landscape Makeover Series; one pump station open house; customer appreciation day; seven community booths; and 2,784 students and 337 adults on water treatment plant tours.

Objective: (c) **7.1 - Continue to educate district ratepayers on the value and cost of water via the district's website, materials, classes and other educational events.**

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective.

Objective: (d) **7.1 - Focus on community engagement through the district's Water Talks, Helix Helps, social media and community presentation/outreach programs to educate customers regarding the district's operation and the people, process and cost of providing water 24/7, 365 days a year.**

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0

Comments/Notes: Annual Objective. Community outreach events include Helix Helps; a minimum of three landscape workshops; Water Talks at the operations center, administration office and treatment plant; and Water Chats at the administration office. Active presence on social media.

Goal: 7.3 - 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.

Objective: (a) **7.3 - Continue to update the district's website to keep it fresh and informative.**

Completed

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100

Comments/Notes: Annual Objective. Completed website update includes new pages and menu links for water quality, infrastructure, sustainability, development services, Lake Jennings and community events, plus improved accessibility.

Strategic Focus Area 7 - Public Education & Outreach (continued)

Objective: (b) 7.3 - Continue to update the district's website to keep it fresh and informative.

New

Department: Administrative Services Fiscal Year: 2019-20 Due Date: 6/30/2020 % Complete: 0
Comments/Notes: Annual Objective. Updated website to be revealed in August 2019.

Completed Objectives

Strategic Focus Area 2 - Employees

Objective: 2.4 - Perform staff training on earthen dam data collection, data review, trigger points and audit review of current practices.

Department: Water Quality Fiscal Year: 2017-18 Due Date: 7/31/2018 % Complete: 100
Comments/Notes:

Strategic Focus Area 3 - Fiscal Integrity & Sustainability

Objective: 3.3 - Annually identify and allocate resources to achieve strategic plan goals and ensure those resources are reflected in the annual budget.

Department: Administrative Services Fiscal Year: 2017-18 Due Date: 8/30/2018 % Complete: 100
Comments/Notes: Annual Objective. Work commences during budget process in March 2018 for August 2018 completion.

Objective: 3.4 - Maintain stable water rates to support the operations and maintenance of the district, and adequately fund replacement and upgrades as well as reserves.

Department: Administrative Services Fiscal Year: 2017-18 Due Date: 8/30/2018 % Complete: 100
Comments/Notes: Annual Objective. Rate analysis is performed during budget process beginning in March 2018 for August 2018 completion.

Objective: 3.7 - Complete HVAC improvements at the administration office.

Department: Operations Fiscal Year: 2018-19 Due Date: 4/19/2019 % Complete: 100
Comments/Notes:

Objective: 3.7 - Complete phase 1 of the administration office window film project.

Department: Operations Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100
Comments/Notes:

Strategic Focus Area 4 - Infrastructure

Objective: 4.2 - Complete replacement of check valves at Dictionary Hill hydro system.

Department: Water Quality Fiscal Year: 2017-18 Due Date: 9/30/2018 % Complete: 100
Comments/Notes:

Objective: 4.5 - Complete replacement of Calavo Pump Station surge tank bladder.

Department: Water Quality Fiscal Year: 2018-19 Due Date: 10/31/2018 % Complete: 100
Comments/Notes:

Strategic Focus Area 4 - Infrastructure (continued)

Objective: **4.5 - Install filter media in filters to bring back to design specifications.**

Department: Water Quality Fiscal Year: 2018-19 Due Date: 11/1/2018 % Complete: 100
Comments/Notes:

Objective: **4.5 - Develop an easement pipeline abandonment master plan.**

Department: Engineering Fiscal Year: 2013-14 Due Date: 12/31/2018 % Complete: 100
Comments/Notes:

Objective: **4.5 - Develop and update the bond release procedures for private development to coincide with government code for latent defects and projects under the Subdivision Map Act.**

Department: Engineering Fiscal Year: 2018-19 Due Date: 12/31/2018 % Complete: 100
Comments/Notes:

Objective: **4.5 - Complete all outstanding encroachments listed currently on the encroachment management plan.**

Department: Engineering Fiscal Year: 2015-16 Due Date: 6/30/2019 % Complete: 100
Comments/Notes:

Objective: **4.5 - Develop and implement design manual to assist with in-house distribution system pipeline replacement projects.**

Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100
Comments/Notes:

Objective: **4.5 - Issue request for proposals for as-needed electrical design to support the motor control center upgrade projects and other engineering department support.**

Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100
Comments/Notes:

Objective: **4.5 - Complete installation of new signage at Lake Jennings.**

Department: Water Quality Fiscal Year: 2018-19 Due Date: 10/31/2019 % Complete: 100
Comments/Notes:

Strategic Focus Area 6 - Optimizing Technology

Objective: **6.4 - Evaluate alternative server virtualization technologies.**

Department: Administrative Services Fiscal Year: 2017-18 Due Date: 9/30/2018 % Complete: 100
Comments/Notes: Analysis complete as of 06/01/18. At this time, the virtualization technology currently in use remains the best choice for scalability, cost and ease of use.

Strategic Focus Area 6 - Optimizing Technology (continued)

Objective: **6.4 - Purchase and install Chemtrac particle counters to replace obsolete Hach Met One units.**

Department: Water Quality Fiscal Year: 2018-19 Due Date: 11/1/2018 % Complete: 100
Comments/Notes:

Objective: **6.4 - Migrate Autodesk licensing server.**

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 3/1/2019 % Complete: 100
Comments/Notes: Migrate the existing Autodesk licensing server from an aging physical server to a virtual server.

Objective: **6.4 - Develop and implement the native OnBase forms for daily inspection reports.**

Department: Engineering Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100
Comments/Notes:

Strategic Focus Area 7 - Public Education & Outreach

Objective: **7.4 - Work with the San Diego County Registrar of Voters for the election of three divisions.**

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 12/30/2018 % Complete: 100
Comments/Notes:

Objective: **7.4 - Complete the development of an onboarding process for newly elected board members.**

Department: Administrative Services Fiscal Year: 2018-19 Due Date: 6/30/2019 % Complete: 100
Comments/Notes: Public Affairs collaborated with board secretary to produce orientation video for new board members.