



# Hidden Valley Lake Community Services District

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## Strategic Plan

2013-2018



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[www.HiddenValleyLakeCSD.com](http://www.HiddenValleyLakeCSD.com)

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# Introduction

The Hidden Valley Lake Community Services District is an independent special district serving the Hidden Valley Lake community in southern Lake County, California.

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## *Our Mission*

*To effectively and innovatively manage the natural resources with which we have been entrusted; to provide reliable, safe, high-quality water and wastewater services in an economically and environmentally responsible manner.*

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We supply clean, safe municipal drinking water to approximately 2,400 homes and 20 businesses, and provide reliable sewer services for approximately 1,500 connections within our three-square-mile service area – all while conserving the area’s natural resources and protecting the environment.

While our core function will always be to provide high-quality drinking water and wastewater services, the manner in which we perform and fund that function must evolve to meet new challenges, including:

- Increasingly stringent, complex, and costly regulatory restrictions
- Urgently needed infrastructure maintenance and upgrades
- A still-uncertain economy
- The impacts of droughts and climate change on the area’s water supply

We developed this strategic plan to address these and other challenges, and to identify and benefit from emerging opportunities over the next five years. The goals, strategies and initiatives in this plan will enable us to accomplish our mission and meet our community’s needs in the most efficient and cost-effective ways, now, and in the future.

## **History**

The Hidden Valley Lake Community Service District was established in 1984 to provide sewer services to the Hidden Valley Lake community. At that time, water was being supplied to the Hidden Valley Lake subdivision by the Stonehouse Mutual Water Company. To provide more efficient services and significant cost savings to the growing

community, in 1993 the two utility agencies merged into today's Hidden Valley Lake Community Services District.

Many changes have occurred since then: the population of our service area; the processes and technologies we use to provide safe drinking water and to treat wastewater; State and Federal water quality regulations; the environmental awareness of our customers who use our services; and the dedicated people who provide them. What hasn't changed is our commitment to our mission and to the people we serve.

## Core Values

The following core values reflect what is truly important to us as an organization and are the guiding principles that dictate our actions and the philosophical beliefs we value when faced with options and alternatives for our future:

- **Public Health** - We provide safe, reliable drinking water and wastewater treatment.
- **Customer Service** - We deliver customer-focused service and are responsive to our ratepayers.
- **Cost-Effectiveness** - We deliver the highest value at the lowest cost to ensure reasonable rates.
- **Integrity** - We conduct business with high ethical standards, promoting transparency and trust.
- **Organizational Excellence** - We practice good governance and support District employees to be productive and motivated.
- **Reliability** - We maintain and update infrastructure to ensure reliable service.
- **Stewardship** - We protect our natural resources and the environment.
- **Innovation** - We utilize our assets (infrastructure, natural resources and people) to maximize the value to the community.

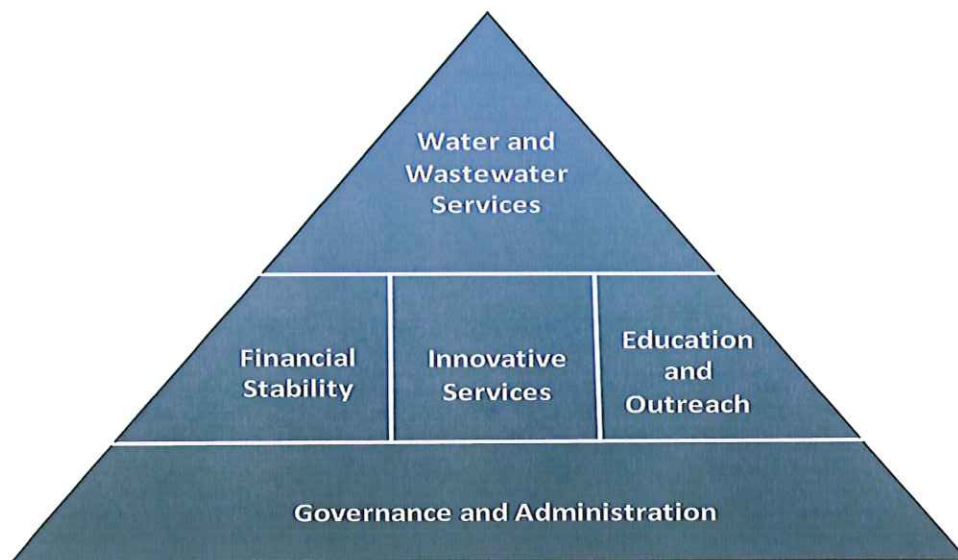
## Goals

**Our overarching goal is to provide affordable, high-quality water and wastewater services to our customers.** The ability to achieve this overarching goal is dependent, at least in part, on the District's ability to achieve additional goals pertaining to innovation, financial stability, governance and administrative processes, and education and outreach:

1. **Deliver High-Quality Water and Wastewater Services** - We will continue to deliver the highest quality water and wastewater services.

2. ***Maintain Financial Stability*** - We will maintain financial stability and equitable rates.
3. ***Expand Education and Outreach*** - We will expand education and outreach programs to enhance customer awareness of District services and to promote government transparency.
4. ***Offer Innovative Services*** - We will innovate to maximize value to the community.
5. ***Refine Governance and Administrative Processes*** - We will continuously refine our governance and administrative processes to promote efficiency, transparency, and customer service.

As illustrated below, our overarching goal of providing affordable, high-quality water and wastewater services is supported on a foundation of good governance and administrative processes that not only promotes transparency, but also fosters development of innovative services that will add value to the community and contribute toward the financial stability of the District.



# Situational Analysis

## Current Status

The last 18 months have been a turbulent time for the District. In addition to experiencing leadership changes, we recently completed a large solar energy project that will provide lasting benefits to our customers and our community, but which required substantial staff and financial resources – a “big gulp” that diverted resources away from other essential projects and activities.

Our financial reserves are nearly depleted. There is a growing list of deferred maintenance activities, no formal capital improvement plan to sustain our infrastructure, and a portion of the District’s water rights remain unsecured. Like nearly all water utilities, we are working within an increasingly complex and sophisticated regulatory framework, additional operating protocols and constraints, increasingly stringent water quality standards, and additional limitations with respect to raising revenues to cover increased operating expenses.

We are now at a crossroads and must make smart choices that will define the character of our organization for years to come.

## Challenges

Our top challenge is the financial health of the District. As previously noted, our financial reserves are nearly depleted. During the last two years we have covered water and, to a lesser extent, sewer service operating costs by deferring maintenance. The eventual repercussions of deferring maintenance are predictable: infrastructure failures and, in turn, increased costs associated with repairing or replacing equipment, pipelines and facilities.

Less obvious, but of equal concern, is the debilitating effect funding shortfalls have on our ability to pursue new opportunities. The old adage, “It takes money to make money,” applies even in the public sector. It takes money to prepare grant proposals, to retain personnel who can research and assess the feasibility of implementing new opportunities, and to advocate on behalf of the District. The District is currently not well positioned, financially, to pursue new opportunities.

In addition to replacing aging infrastructure and strengthening our financial position, we must secure and protect the District’s water supply. In 2012 we submitted a Petition for Change to the State Water Resources Control Board’s Division of Water Rights – a process through which we intend to solidify the District’s water rights to current and future water supplies. The Petition for Change, although largely a “paper study” as opposed to the traditional “brick-and-mortar” project, could easily take five years to complete and cost in excess of \$300,000.

More recently, the California Department of Public Health has proposed stringent drinking water standards for hexavalent chromium. The question is not whether a



standard for hexavalent chromium will be adopted, but what that drinking water standard will be. The District's water supply exhibits detectable concentrations of naturally occurring hexavalent chromium. We anticipate that new, and most likely expensive, water treatment processes will be required to comply with the forthcoming drinking water standard for hexavalent chromium. Preliminary study results suggest that compliance with the anticipated hexavalent chromium drinking water standard could substantially increase our water service fees.

## **Opportunities**

While our challenges are significant, there are also opportunities to consider. Increasingly, water is being viewed and managed with respect to its impact on other resources, rather than as a single commodity that is consumed and replenished. The "water world" is changing, as reflected by the growing awareness of the substantial energy inputs required to treat, store, and transport water ("water-energy nexus"), the emergence of PACE (Property Assessed Clean Energy) and other innovative programs to fund residential/commercial water and energy conservation improvements, and the rapidly evolving integrated regional water management discipline.

Twenty years ago, the notion that water conservation or improvements to water conveyance facilities constituted a viable mechanism for conserving electrical energy was unheard of, except perhaps in academic circles. Today, considerable grant funding is being directed toward water conservation and improvements to water conveyance facilities for the primary purpose of reducing electrical energy consumption. Similarly, water conservation, via its ability to reduce electrical usage, has been connected to climate change and what may prove to be lucrative carbon sequestration markets.

Historically, water utilities have received their operating revenue from their customers in the forms of fee-for-services and property tax assessments. This approach is arguably reflective of how water resources have historically been managed – as a single commodity. The advent of integrated water resources management, where water is viewed and managed with respect to its impact on other resources, provides an environment more conducive to entrepreneurial enterprises that could evolve into significant sources of revenue.

## **Five-Year Vision**

In 2018, as our community has grown, so have our District's services. We continue to provide the best level of service possible using up-to-date technology and industry best practices. We have developed the infrastructure to meet changing community needs and maintain reasonable rates.

These successes are possible because we have:

- Taken steps to ensure a secure water supply to maintain quantity and quality for our customers

- Continuously invested in ongoing capital improvements and infrastructure replacement
- Expanded our sphere of influence to reflect Lake County General Plan growth projections and regional service demands
- Maintained prudent financial reserves
- Continued to earn the respect and loyalty of our customers by providing service that is fast, friendly, and professional
- Implemented an effective resource conservation program, not only with our customers, but also in our internal operations
- Added innovative revenue-generating activities utilizing natural resources and organizational expertise, as well as strategic partnerships with other public and private entities
- Enhanced our technology, policies and process to ensure transparency and efficiency

# Goals, Strategies and Initiatives

## *Goal 1: Deliver High-Quality Water and Wastewater Services*

We will continue to deliver the highest quality water and wastewater services.

### **Background**

The Hidden Valley Lake Community Services District provides safe drinking water that meets all State and Federal standards, and maintains a sewer treatment facility that disposes of waste in an effective and efficient manner. We provide drinking water to more than 2,400 residential and nearly 30 commercial customers, and irrigation water (nearly all of which consists of reclaimed waste water from the District's sewer treatment facility) for approximately 80 acres of the Hidden Valley Lake Golf Course.

Our drinking water supply comes from three wells which draw groundwater from the Coyote Valley groundwater basin and Putah Creek underflows. Collectively, the three wells have a combined maximum capacity of 2.72 million gallons per day (mgd). A fourth well provides up to 1.44 mgd for irrigation purposes. Currently, the peak total daily demand for drinking water is approximately 1.7 mgd. Our water distribution system includes 31 miles of pipes ranging from 4 inches to 12 inches in diameter, five booster pumps (each of which can pump up to 300 gallons per minute), and seven drinking water storage tanks with a combined storage capacity of 2.2 million gallons.

Our wastewater system provides wastewater collection, treatment, and disposal for nearly 1,500 customers. Currently, the wastewater treatment facility processes an average of 180,000 gallons per day, all of which is recycled and used to irrigate the Hidden Valley Lake Golf Course. Upon full expansion, the treatment plant could process up to 2.67 mgd. Our sewer collection system consists of approximately 15 miles of sewer pipe ranging from 4 inches to 15 inches in diameter, 1.5 miles of forced main, and eight pumping stations.

### **Strategies and Initiatives**

#### **1A. Secure and protect the water supply**

The District is fortunate to have access to a reasonably reliable and, for the most part, a contaminant-free drinking water supply. The Coyote Valley groundwater basin, the source of our water supply, is fully recharged each spring in all but the driest years, and due to the largely rural character of the region, is not heavily impacted by urban or industrial source pollutants. Although physically present and of suitable quality, we must take steps to finalize and further secure our water rights to the Coyote Valley groundwater basin supply, increase our hydrogeologic knowledge of the supply, and promote resource stewardship to ensure its sustainability. As a part of this strategic plan, we will take the following actions:

- Amend and expand water rights
  - Water Rights Petition for Change
  - Update analysis of future water demands
  
- Increase knowledge of watershed and factors impacting quantity and quality of water supply
  - Expand water quality monitoring program
  - Expand groundwater elevation monitoring program
  - Compile library of technical studies and associated documents
  - Evaluate risk of “emerging contaminants”
    - Hexavalent chromium
    - Endocrine disrupters
  
- Increase understanding of surface water – groundwater interactions within the Coyote Valley groundwater basin
  
- Promote stewardship of Coyote Valley groundwater basin
  - Monitor and participate in County land use planning activities
  - Support local watershed protection groups

**1B. Maintain and enhance sewer infrastructure**

Portions of our sewer collection system are nearly 40 years old and approaching the end of their design life, as evidenced by the increasing number and extent of annual repairs required to keep the collection system operational and in compliance with State and Federal regulations. In addition to the increased potential for raw sewage spills, cracks and leaks in the pipes of the aging infrastructure are allowing ground and surface water to enter the system, increasing the volume (and treatment cost) of the wastewater being processed by our treatment facility. As a part of this strategic plan, we will take the following actions to upgrade the District’s sewer infrastructure:

- Complete inventory/catalog of sewer infrastructure
  
- Implement updated Sewer System Management Plan (SSMP)
  - Expand systematic sewer maintenance cleaning program
  - Implement systematic service line replacement program
  
- Implement Sewer Capital Improvement Plan

### **1C. Maintain and enhance water infrastructure**

Portions of our water distribution system are approaching the end of their design life and need to be replaced. As a part of this strategic plan, we will take the following actions to upgrade the District's water infrastructure:

- Complete inventory/catalog of water infrastructure
- Implement Water Capital Improvement Plan
- Implement leak detection program
- Implement systematic water meter replacement program

### **1D. Enhance site security for all facilities and infrastructure**

Over the years we have taken a number of steps to protect our people and facilities from violence and vandalism, including security fencing, video monitoring, and safety training. More recently, in this "post 911" era, we must also consider threats of terrorism, particularly to key facilities such as pumping stations, storage tanks, and the District's raw water supply. As a part of this strategic plan, we will construct enclosures/housing for water supply wells.

### **1E. Evaluate flood control**

At the time of formation, the District inherited a flood retention basin and approximately one-mile of flood control levee along Putah Creek, for which there is no dedicated source of funding for operations and maintenance, or documented maintenance program. As a part of this strategic plan, we will:

- Identify current level of flood protection provided by existing facilities
- Implement facilities maintenance program
- Develop dedicated source of funding

## ***Goal 2: Maintain Financial Stability***

We will maintain financial stability and equitable rates.

### **Background**

The District has a history of financial stability. We have always paid our employees and vendors in a timely manner. Likewise, we are current on all outstanding debt. Though we have been able to fund operating expenses through normal operating revenue, there is very little in reserves.

We have historically been able to fund expansion and major maintenance projects through grants, bonds, or low-interest loans. But in the post-bear market, stricter lending

requirements mean we will have to make significant changes to qualify for such lending sources. To ensure access to improvement funds, we will adopt a policy that will create and maintain adequate reserves, both operating and capital, and perform periodic rate studies to assess changing financial needs. We will also seek professional guidance regarding other fiscal policies and strategies that will re-open the door to future lenders.

## **Strategies and Initiatives**

### **2A. Update fiscal policies to promote financial stability**

The recent nationwide economic recession and high-profile municipal bankruptcies has increased awareness and scrutiny of municipal finances, as reflected by the general tightening of municipal credit. In order to maintain and enhance the District's credit rating we will:

- Develop reserve fund policies
- Fund depreciation

### **2B. Adopt fixed asset management plan**

We will develop a fixed asset management plan which will form the basis for determining appropriate funding levels for infrastructure and other fixed asset depreciation.

### **2C. Expand our ability to track and manage financial data**

We routinely compile revenue and expense data that could provide valuable and timely information. To enhance our ability to track and analyze financial data, we will:

- Upgrade administrative computer system
- Monitor trends and develop long-term fiscal projections
- Improve cost tracking by activity/project

### **2D. Ensure rates are equitable and promote financial stability**

We will commission a third-party water, sewer and miscellaneous fee study to determine the financially prudent revenue stream required to execute this strategic plan.

### **2E. Identify sustainable funding mechanism for flood control facilities**

There is currently no dedicated revenue stream for funding operation and maintenance of our existing flood control facilities, nor expansion of flood control facilities or

responsibilities should the District be required to obtain a National Pollutant Discharge Elimination System (NPDES) storm water discharge permit in the future. As part of this strategic plan we will conduct an analysis of current and future flood control funding requirements, and identify potential funding sources.

### ***Goal 3: Expand Education and Outreach***

We will expand education and outreach programs to enhance customer awareness of District services and promote government transparency.

## **Background**

Historically, the amount of money and staff time allocated for education and outreach has been very limited. As a result, our education and outreach efforts are relatively modest in comparison to other utilities. Much of our effort is focused on the promotion of water conservation in local grade school classrooms and at two-to-three community events each year. We periodically produce a newsletter that is mailed to customers and maintain a website, but we have not used electronic social media to disseminate information.

## **Strategies and Initiatives**

### **3A. Expand customer education about the District and our services**

Nationwide, the cost of providing safe, reliable municipal drinking water has risen steadily, and from the customer's perspective, for unknown or unsubstantiated reasons. A frequently heard complaint is that customers are being told to conserve water, which they do, and are subsequently "rewarded" with increased water rates. In general, water utility customers are unaware of the true cost of producing and delivering municipal drinking water. Similarly, they are often not fully aware of the water utility's services, or its responsibilities to maintain its sewer and drinking water infrastructure.

Coupled with the need to better educate customers is the related task of expanding the modes of communication. Among some demographics, electronic social media has become the preferred mode of communication. Disseminating information via social media is less expensive and often more effective than newsletters and other traditional means. As a part of this strategic plan, we will:

- Familiarize customers with the scope and breath of District services and the true cost of providing those services
- Utilize electronic social media, in conjunction with traditional newsletters, to disseminate information

### **3B. Educate customers about resource conservation and pollution prevention**

Resource conservation and pollution prevention are the cornerstone of nearly every watershed stewardship program, and the central theme of the District's resource stewardship advocacy efforts for the Coyote Valley groundwater basin. To promote resource stewardship, we will continue to educate customers and increase public awareness of water conservation, and will also designate funding to expand programs to educate the public with regard to:

- Sewer lateral maintenance
- Stormwater management
- Safe disposal of grease, cleaning agents, pharmaceuticals and other household wastes

### **3C. Expand customer service training for employees**

Customer service, and more specifically, the public's expectations with respect to customer service, have and continue to evolve in response to the expanding functions of water utilities and the growing acceptance of electronic media as a means of communication. The District will expand and formalize its employee customer service training program to reflect the evolving functions of the District and the expanding role of electronic media. Specifically, the District will:

- Provide formal training (webinar, video, lectures)
- Initiate an annual customer satisfaction survey

### ***Goal 4: Offer Innovative Services***

We will innovate to maximize value to the community.

#### **Background**

As reflected by the emergence of "integrated regional water management planning," water utilities are evolving into resource management agencies that view and manage water resources from an interdisciplinary perspective. Increasingly, water utilities are becoming involved in projects and enterprises – habitat protection and restoration, energy conservation and "green" energy production, and land use planning – that were previously considered beyond the realm of water management. Coupled with the expansion of these services is the challenge to maintain affordable water rates.

The shift toward integrated regional water management bestows new responsibilities upon water utilities, but also provides an environment more conducive to entrepreneurial enterprises. We intend to explore and, when appropriate, initiate



entrepreneurial enterprises that will ultimately help us to maintain affordable water rates or otherwise benefit the Hidden Valley Lake community.

## **Strategies and Initiatives**

### **4A. Leverage District resources to generate revenue**

The District possesses expertise, equipment, and infrastructure that could be used to generate revenue and/or provide additional services to the community. As a part of this strategic plan, we will:

- Expand solar power generation capacity
- Investigate feasibility of wind power generation
- Investigate feasibility of providing facilities for the provision of internet services
- Investigate feasibility of converting sludge to marketable products
- Investigate feasibility of rainwater capture financing and installation
- Investigate feasibility of providing water/wastewater quality laboratory analysis services
- Provide expertise and intellectual capital to other organizations
  - Billing services
  - Consulting/contractor services
- Rent/lease heavy equipment

### **4B. Pursue partnerships and strategic alliances to develop revenue-generating activities**

We will cultivate partnerships and alliances through participation in integrated regional water management planning efforts and water industry organizations such as the Association of California Water Agencies, and where appropriate, through political advocacy. Specifically, we will:

- Actively participate in the Westside Sacramento Integrated Regional Water Management Plan group
- Promote and facilitate communication between water purveyors and wastewater service providers in the Upper Putah Creek drainage
- Cultivate relations with local, State and Federal elected officials

## ***Goal 5: Refine Governance and Administration***

We will continuously refine our governance and administrative processes to promote efficiency, transparency, and customer service.

### **Background**

Our ability to provide high-quality services is determined, in part, by the effectiveness of our governance structure and administration. Accordingly, we intend to enhance our service offerings by embracing and refining good governance practices and administrative processes. Specifically, we will codify Board of Director rules and procedures, and refine administrative processes through the incorporation of new technology. Collectively, these actions will not only enhance customer service, but also transparency – the “window” through which our constituents can assess the effectiveness and equity of the decisions and actions of our Board of Directors, as well as our General Manager and District staff.

### **Strategies and Initiatives**

#### **5A. Update governance procedures to promote efficiency and transparency**

To improve Board governance we will adopt Board of Director Rules and Procedures to guide the conduct of Board meetings, communication among individual Board members, communication between the Board and District staff, and communication between individual Board members and District staff.

#### **5B. Update administrative processes to enhance customer service**

To improve our administrative processes and enhance customer service, we will:

- Implement a paperless service order program and promote electronic billing to improve customer service and reduce administrative costs
- Automate meter reading to improve customer service, reduce administrative costs, and improve records retention and retrieval
- Utilize network system/cloud services to improve records retention and retrieval, and enhance preservation of District records in the event of disaster
- Implement an automated call system to improve customer service and enhance emergency response capabilities

### **5C. Conduct customer satisfaction surveys**

We have never conducted a customer satisfaction survey and have historically received comparatively little feedback from our customers regarding services provided, or potential interest in new or expanded services. To assess the appropriateness and quality of our services, we will conduct annual web-based customer satisfaction surveys. We will also assess the District's ability to provide services, and the need or interest in providing additional services.

### **5D. Continuously update human resources policies and practices to recruit and retain skilled employees**

To facilitate recruitment and retention of appropriately skilled employees, we will:

- Maintain up-to-date job descriptions to reflect current and future staffing needs
- Provide competitive compensation to attract and retain staff
- Develop staff skills and capabilities that will enhance District's ability to provide services
- Provide training/cross-training and offer education reimbursements to facilitate development of staff skills and capabilities

### **5E. Review organizational structure and staffing needs**

The organizational structure and staffing needs of water utilities are changing in response to the expanded responsibilities and interests bestowed by integrated regional water management, an increasingly stringent regulatory environment, and a growing willingness to engage in entrepreneurial enterprises. Twenty years ago it was highly unusual for a water utility to have fisheries or aquatic biologists on staff. Similarly, storm water management staffing was unheard of, and few, if any, water utilities engaged in solar power generation.

The District, in part through implementation of this strategic plan, is evolving, and out of necessity, becoming more knowledgeable and sophisticated with respect to a variety of water management issues. While the provision of water and sewer services will always remain our core function, and there will always be a need for that skill set, it is increasingly apparent that additional skills, most notably analytical skills, are needed to fulfill the District's mission. As a part of this strategic plan, we will review our organizational structure and staff composition and capabilities to ensure that they are aligned with current and future needs.

# Strategic Plan Updates

To ensure this Strategic Plan remains functional, practical, and continues to address the current needs of the District, we will review and update the plan at least semiannually. Prior to adoption of the District's budget for the following fiscal year, we will review the plan and:

- Identify specific elements of the Strategic Plan to be initiated and/or completed in the next fiscal year
- Measure our performance toward achieving the Strategic Plan's goals
- Publish a report summarizing the progress made and any changes with respect to the Strategic Plan goals, strategies or initiatives