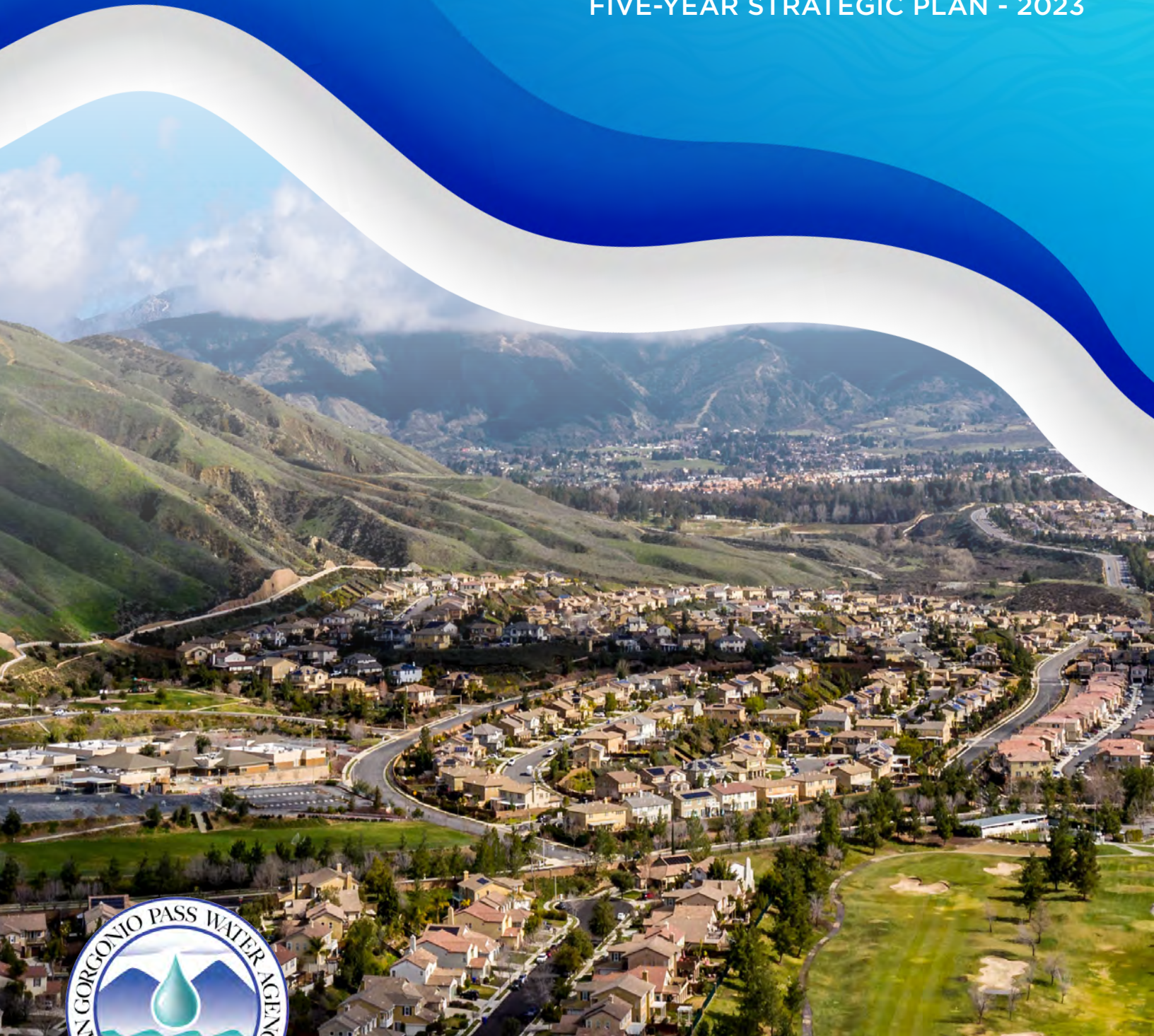


SAN GORGONIO PASS WATER AGENCY

REGIONAL WATER SECURITY

PLANNING TODAY FOR A RELIABLE FUTURE

FIVE-YEAR STRATEGIC PLAN - 2023



sgpwa.com

Executive Summary

San Geronio Pass Water Agency (SGPWA) is a dynamic and collaborative agency focused on ensuring a sustainable water supply for the region, today and for years to come.



As part of our efforts to secure future reliability, the Agency developed the following Strategic Plan. The plan is designed to serve as a guidepost for SGPWA as we meet our mission and achieve our vision.

The plan's development process included several transformative stages, such as reshaping the Agency's mission, vision and values. These vital components serve as the Agency's cornerstones and guide the work to be completed over the next five years.

The development process was a collective endeavor, ignited by a dedicated Board of Directors and shaped by the valued input of Agency leadership and employees. The result is a testament to our shared vision, reflective of an innovative and forward-thinking organization. The process allowed us to fuse diverse insights and perspectives, create actionable strategies and ensure the necessary resources to accomplish intentional objectives.

As SGPWA moves toward the future, our emphasis will continue to be serving the region to address water challenges and opportunities through collaboration, while engaging the public and stakeholders on the critical value of sustaining water supplies. We are dedicated to diversifying water resources, advancing partnerships, improving infrastructure reliability and maintaining financial stability - all with transparency, team development and responsible governance in mind.

The SGPWA Strategic Plan is a carefully curated pathway that allows SGPWA to embrace the future, empower ourselves and our partners, and craft a trail that continues to foster industry leadership with a transformative impact.

2023 TIMELINE



PROCESS





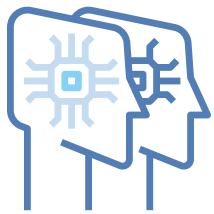
Mission

San Gorgonio Pass Water Agency supports the region’s quality of life through sustainable water management.



Vision

San Gorgonio Pass Water Agency aims to provide water security that meets the regional needs of an evolving landscape, transcending boundaries to work toward common goals, create synergy through collaboration and ensure an adequate water supply today and in the future.



Values

Collaborative
Reliable
Responsive

Innovative
Accountable
Trustworthy

Sustainable
Forward-focused



Photo courtesy of California Department of Water Resources

ABOUT US

Formed in 1961, SGPWA is a State Water Contractor that serves a 225-square-mile area of western Riverside County. The service area includes the cities of Calimesa, Beaumont, and Banning, and the communities of Cherry Valley, Cabazon, and the Banning Bench. In addition to importing State Water Project (SWP) water from Northern California to augment local groundwater sources, the Agency builds local system infrastructure, participates in water transfers, partners in statewide water projects and collaborates on regional water reliability and conservation efforts.

Key Themes & Strategic Initiatives



WATER SUPPLY & STEWARDSHIP

Adapt to the current and future water landscape, supporting the region's long-term needs by diversifying the local supply portfolio and promoting water sustainability.



INFRASTRUCTURE & SYSTEM RELIABILITY

Ensure a reliable delivery system that advances efficiency and resiliency through repairs and improvements, new facilities, land acquisition, strategic stakeholder collaboration, and cutting-edge technologies.



FINANCE & ADMINISTRATION

Sustain long-term financial stability through thoughtful planning and innovative practices, such as water sales, transfers and agreements, grant opportunities, partnerships, and infrastructure investments, while maintaining fiscal accountability.



GOVERNANCE

Serve the public with dedication, determination, transparency, collaboration and a commitment to expanding knowledge.



REGIONAL LEADERSHIP, INDUSTRY RELATIONSHIPS & COLLABORATION

Maintain, foster and expand collaboration with local, regional, state and federal partners to develop strategic solutions to water supply challenges and opportunities.



PERSONNEL

Position the agency for long-term success by developing and growing a supportive, welcoming and collaborative environment that attracts and retains devoted employees.



PUBLIC ENGAGEMENT

Engage and educate the public in a meaningful way that generates a greater understanding of the agency's role in water supply sustainability and the importance of conservation.



GOALS AND OBJECTIVES



Water Supply & Stewardship

STRATEGIC GOAL 1: Align with the current and future water landscape, supporting the region's long-term needs by diversifying the local supply portfolio and advancing water sustainability.



Objective 1: Establish relationships and expand collaborative opportunities at the local, regional, state, and federal levels that will enhance the water supply in the region. (See Regional Leadership, Industry Relationships, and Collaboration, page 10.)

Objective 2: Sustain infrastructure investment to provide a robust regional water distribution and storage system. (See Infrastructure and System Reliability, page 7.)

Objective 3: Continue to participate in and facilitate local and state projects that increases water supply reliability, such as Sites Reservoir, Delta Conveyance, and other State Water Project facilities.

Objective 4: Seek opportunities in the California water market to maximize the beneficial use of Agency water assets.

Objective 5: Expand water banking, local and abroad, for future utilization.

Objective 6: Explore new tactics to support future supply and mitigate regional droughts, such as desalination, stormwater capture, cloud seeding, recycled water, and other opportunities as they arise.

Objective 7: Support local small water systems in securing funding and resources.

Objective 8: Promote water conservation by partnering with regional stakeholders. (See Regional Leadership, Industry Relationships, and Collaboration, page 10, and Public Engagement, page 11.)

Objective 9: Align with and support local water and land use plans.

Objective 10: Work with the local adjudication and Groundwater Sustainability Agencies to manage the region's groundwater basins.



Infrastructure & System Reliability

STRATEGIC GOAL 2: Ensure a reliable delivery system that advances efficiency and resiliency.



Objective 1: Develop additional recharge facilities to support conjunctive use.

Objective 2: Investigate additional opportunities to increase water storage capabilities.

Objective 3: Maintain resilient telemetry and security systems.

Objective 4: Strategically acquire property necessary to support the region's long-term resource needs.

Objective 5: Partner with other State Water Contractors to advance statewide infrastructure goals to preserve system reliability.

Objective 6: Assess existing infrastructure and facilities to create an asset management program.



Finance & Administration

STRATEGIC GOAL 3: Sustain long-term financial stability by engaging in prudent planning to guide informed decision making.

Objective 1: Commission a rate study to ensure long-term financial sustainability.

Objective 2: Develop a comprehensive long-term financial plan.

Objective 3: Seek relevant grants and funding to address current and future water needs.

Objective 4: Pursue and participate in infrastructure investments, water sales, transfers, and agreement opportunities to optimize Agency financial resources.

Objective 5: Consider generational investments to ensure future reliability and secure water supplies for years to come.

Objective 6: Improve the budget format to meet Government Finance Officers Association (GFOA) goals and update the annual financial audited statements, demonstrating accountability.

Objective 7: Optimize the Agency procurement process.

Objective 8: Assess and update policies and ordinances to align with the Agency's mission, vision, and values.



Governance

STRATEGIC GOAL 4: Serve the public with dedication, determination, transparency, collaboration, and a commitment to expanding knowledge.

Objective 1: Ensure that Agency representation by the Board of Directors and staff leadership is strategic and consistent through ongoing educational updates.

Objective 2: Broaden perspectives and gain feedback by attending other agency meetings.

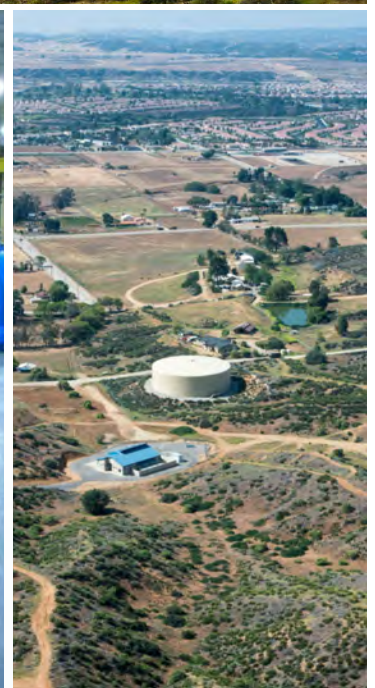
Objective 3: Periodically consider Board structures, such as committees, to best serve public needs.

Objective 4: Provide ongoing education to the Board of Directors on issues affecting the Agency and the regional water landscape.

Objective 5: Conduct Board and leadership spokesperson training.

Objective 6: Institute a formal Board orientation program.

Objective 7: Develop a plan and prepare the Board Directors to provide Agency reports to area cities and water retailers.





Personnel

STRATEGIC GOAL 5: Position the agency for long-term success by continuing to grow a welcoming and collaborative environment that attracts and retains devoted employees.



Objective 1: Address staffing needs, challenges, and opportunities by developing a staffing plan.

Objective 2: Ensure long-term organizational success through the creation of a succession plan to ensure the transfer of knowledge and workflow processes.

Objective 3: Evaluate and update job descriptions as appropriate.

Objective 4: Periodically conduct salary/benefit surveys to offer a competitive compensation package to attract and retain top talent.

Objective 5: Institute a formal new employee orientation program.

Objective 6: Encourage employee career growth by investing in staff training and professional development programs.

Objective 7: Develop and enhance standard operating procedures to optimize employee workflows.

Objective 8: Develop an annual evaluation process that provides opportunities for improvement, provides critical feedback, and rewards exceptional employees.

Objective 9: Continue to foster a supportive, collaborative workplace culture where employees want to continue working.



Regional Leadership, Industry Relationships & Collaboration

STRATEGIC GOAL 6: Maintain, foster, and expand collaboration with local, regional, state and federal partners to develop strategic solutions to water supply challenges and opportunities.



Objective 1: Cultivate local, regional, state, and federal partnerships and identify opportunities to promote and expand collaboration with new or existing partners.

Objective 2: Engage state and federal advocates on behalf of local and California-wide water opportunities and challenges. Explore opportunities for collaboration with partners and stakeholders to communicate messages.

Objective 3: Coordinate with other agencies and organizations on grants and multi-partner project opportunities.





Public Engagement

STRATEGIC GOAL 7: Engage and educate the public in a meaningful way that generates a greater understanding of the agency's role in water supply reliability and the importance of sustainability.

Objective 1: Develop a public information program aimed at building community trust and knowledge that includes both Agency goals and regional collaborative efforts.

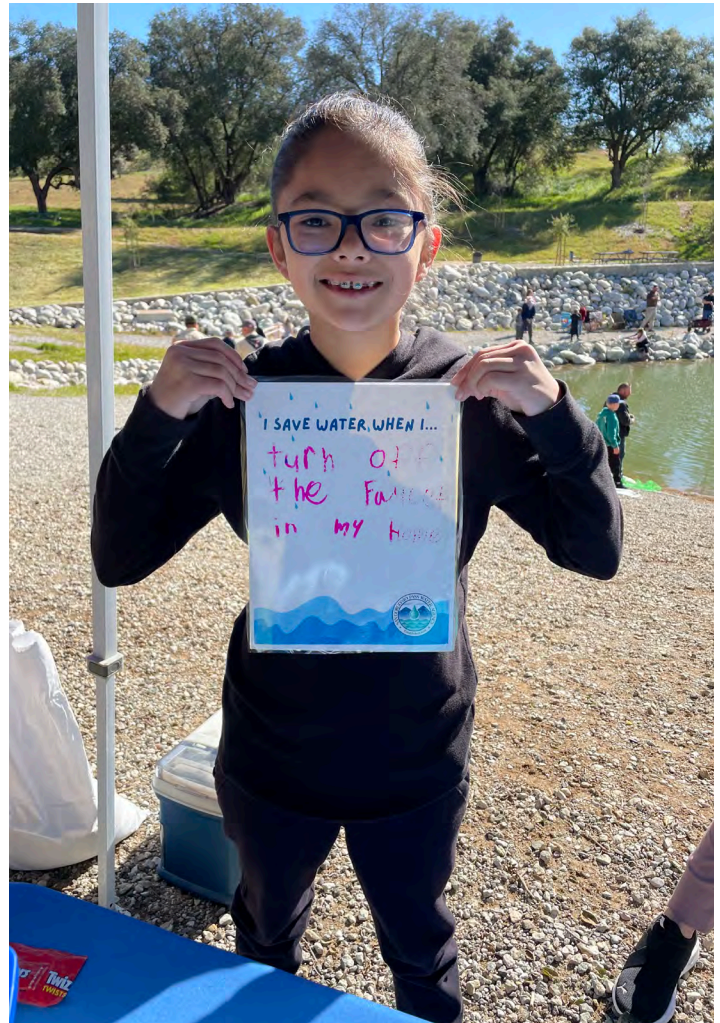
Objective 2: Advance community presence to ensure alignment with Agency communication priorities.

Objective 3: Develop consistent regional messaging to ensure alignment with partner agencies.

Objective 4: Generate educational content to increase public engagement, positive perception, and understanding of the Agency/local water landscape.

Objective 5: Host community-focused educational workshops and participate in area events.

Objective 6: Host an annual/biennial Water Supply Update event for the public, partners, stakeholders, and industry leaders.





By the Numbers

In collaboration with the state and local partners, SGPWA's shared delivery and storage system benefits a population of more than 106,000 people in the Pass Area.



225-square-mile service area



33 miles of pipeline for the East Branch Extension
(connection to the SWP)



5 pump stations



2 reservoirs



2 active recharge facilities in the Pass Area, one
owned and operated by SGPWA



7 metering stations



FIVE-YEAR STRATEGIC PLAN

Regional Water Security
Planning Today for a Reliable Future

October 2023

Timeline & Process

2023 Timeline



Plan Purpose

Why is a Strategic Plan Necessary?

- **Guide Decisions:** Empower staff to make informed decisions guided by clear Board direction. The plan provides a framework for daily decision-making, as well as decisions made in time of crisis.
- **Educate Stakeholders:** Equip the Board with a tool to educate the public, partners, and stakeholders on the direction of the organization.
- **Ensure Accountability:** Provide a resource to the Board that serves as a measure of success for the organization.
 - Through an action plan, timelines for milestones will be established, providing a tool for the Board to determine progress and goal advancement.

Strategic Plan Components



Vision

A vision statement is the aspirational description of how you see the future of the organization

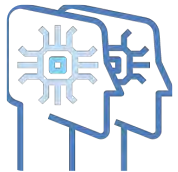
Board Directed



Mission

A mission statement defines your organization's purpose

Board Directed



Values

Core values describe your agency's culture

Board Directed



Key Themes & Strategic Goals

Strategic goals within key themes define the direction provided by the Board to staff in order to move the agency forward

Board Directed



Objectives

Strategies identify a general approach or method to accomplish strategic goals

Board Directed



Milestones

Actions are specific activities that will be implemented to execute your objectives and are tied to a timeline and responsible party to ensure completion

Staff Directed

Strategic Plan Example



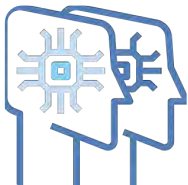
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Mission

San Gorgonio Pass Water Agency supports the region's quality of life through sustainable water management.



Values

Collaborative | Reliable | Responsive | Innovative
Accountable | Trustworthy | Sustainable
Forward-focused



Strategic Goal

(Finance & Administration)

Sustain long-term financial stability by engaging in prudent planning to guide informed decision making.



Objective 1

Commission a rate study to ensure long-term financial sustainability



Milestone A

Select and onboard an independent consultant to lead rate study.
Lead: Thomas | Support: Lance
Due: Q2 FY 2023-24

Key Themes



Water Supply & Stewardship



Finance & Administration



Regional Leadership, Industry Relationships & Collaboration



Personnel



Infrastructure & System Reliability



Governance



Public Engagement

Strategic Goals

Key Theme	Goal A (<i>Presented June 12, 2023</i>)	Goal B
Water Supply & Stewardship	<i>Adapt to</i> the current and future water landscape, supporting the region's long-term needs by diversifying the local supply portfolio and <i>promoting</i> water sustainability.	<i>Align with</i> the current and future water landscape, supporting the region's long-term needs by diversifying the local supply portfolio and <i>advancing</i> water sustainability.
Infrastructure & System Reliability	Ensure a reliable delivery system that advances efficiency and resiliency <i>through repairs and improvements, new facilities, land acquisition, strategic stakeholder collaboration, and cutting-edge technologies.</i>	Ensure a reliable delivery system that advances efficiency and resiliency.
Finance & Administration	Sustain long-term financial stability <i>through thoughtful planning and innovative practices, such as water sales, transfers and agreements, grant opportunities, partnerships, and infrastructure investments, while maintaining fiscal accountability.</i>	Sustain long-term financial stability <i>by engaging in prudent planning to guide informed decision making.</i>

Strategic Goals

Key Theme	Goal A (<i>Presented June 12, 2023</i>)	Goal B
Governance	Serve the public with dedication, determination, transparency, collaboration, and a commitment to expanding knowledge.	Serve the public with dedication, determination, transparency, collaboration, and a commitment to expanding knowledge.
Personnel	Position the agency for long-term success by developing and growing a supportive, welcoming and collaborative environment that attracts and retains devoted employees.	Position the agency for long-term success by continuing to grow a welcoming and collaborative environment that attracts and retains devoted employees.
Regional Leadership, Industry Relationships & Collaboration	Maintain, foster, and expand collaboration with local, regional, state and federal partners to develop strategic solutions to water supply challenges and opportunities.	Maintain, foster, and expand collaboration with local, regional, state and federal partners to develop strategic solutions to water supply challenges and opportunities.
Public Engagement	Engage and educate the public in a meaningful way that generates a greater understanding of the agency's role in water supply sustainability and the importance of conservation .	Engage and educate the public in a meaningful way that generates a greater understanding of the agency's role in water supply reliability and the importance of sustainability .

Post Plan Adoption.. Next Steps

- **Prioritize Milestones for the Year:** Management Team
- **Finalize Action Plan:** Management Team
- **Report FY 2023-24 Milestones to the Board**
- **Report Progress on Milestones Biannually**



An aerial photograph of a water treatment facility. A large, dark blue reservoir is the central feature, surrounded by concrete-lined canals. The facility includes several buildings, a parking lot, and a small bridge crossing a canal. The surrounding landscape is mostly brown, indicating harvested crops, with some green fields and a few trees visible on the right side. The sky is a pale, hazy blue.

Reporting Example

Strategic Goal 5: Personnel

Position the agency for long-term success by continuing to grow a welcoming and collaborative environment that attracts and retains devoted employees.



Strategic Goal 5: Personnel

Objective 1: Address staffing needs, challenges, and opportunities by developing a staffing plan.

Objective 2: Ensure long-term organizational success through the creation of a succession plan to ensure the transfer of knowledge and workflow processes.

Objective 3: Evaluate and update job descriptions as appropriate.

Objective 4: Periodically conduct salary/benefit surveys to offer a competitive compensation package to attract and retain top talent.

Objective 5: Institute a formal new employee orientation program.

Objective 6: Encourage employee career growth by investing in staff training and professional development programs.

Objective 7: Develop and enhance standard operating procedures to optimize employee workflows.

Objective 8: Develop an annual evaluation process that provides opportunities for improvement, provides critical feedback, and rewards exceptional employees.

Objective 9: Continue to foster a supportive, collaborative workplace culture where employees want to continue working.

Objective 3:

Evaluate and update job descriptions as appropriate.

Milestones completed in Q2 FY 2023-24

- ☑ Engage all staff in review of current work performed
- ☑ Evaluate roles and responsibilities for all employees

 Overall Progress: **75% complete**

 **On-track** for FY 2023-24 completion

Objective 3:

Evaluate and update job descriptions as appropriate.

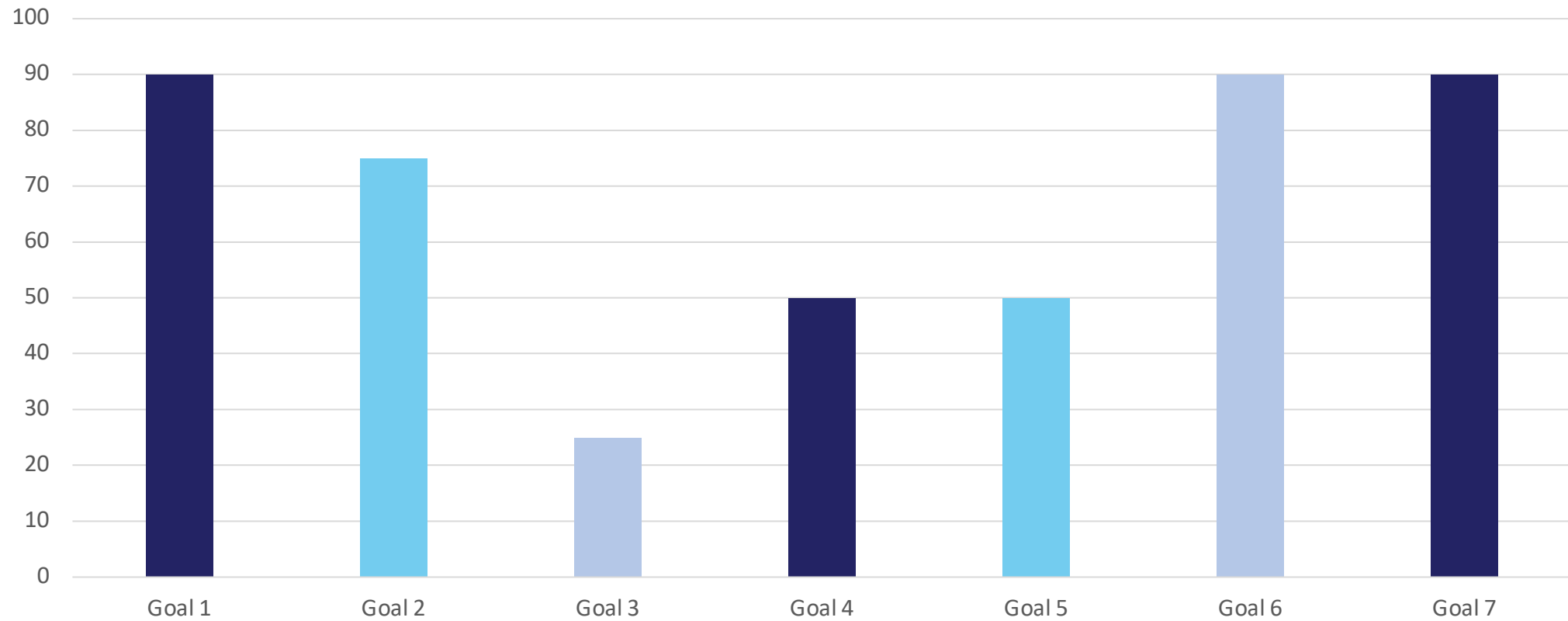
Milestones completed in FY 2023-24

- ☑ Engage all staff in review of current work performed
- ☑ Evaluate roles and responsibilities for all employees
- ☑ Update job descriptions as needed

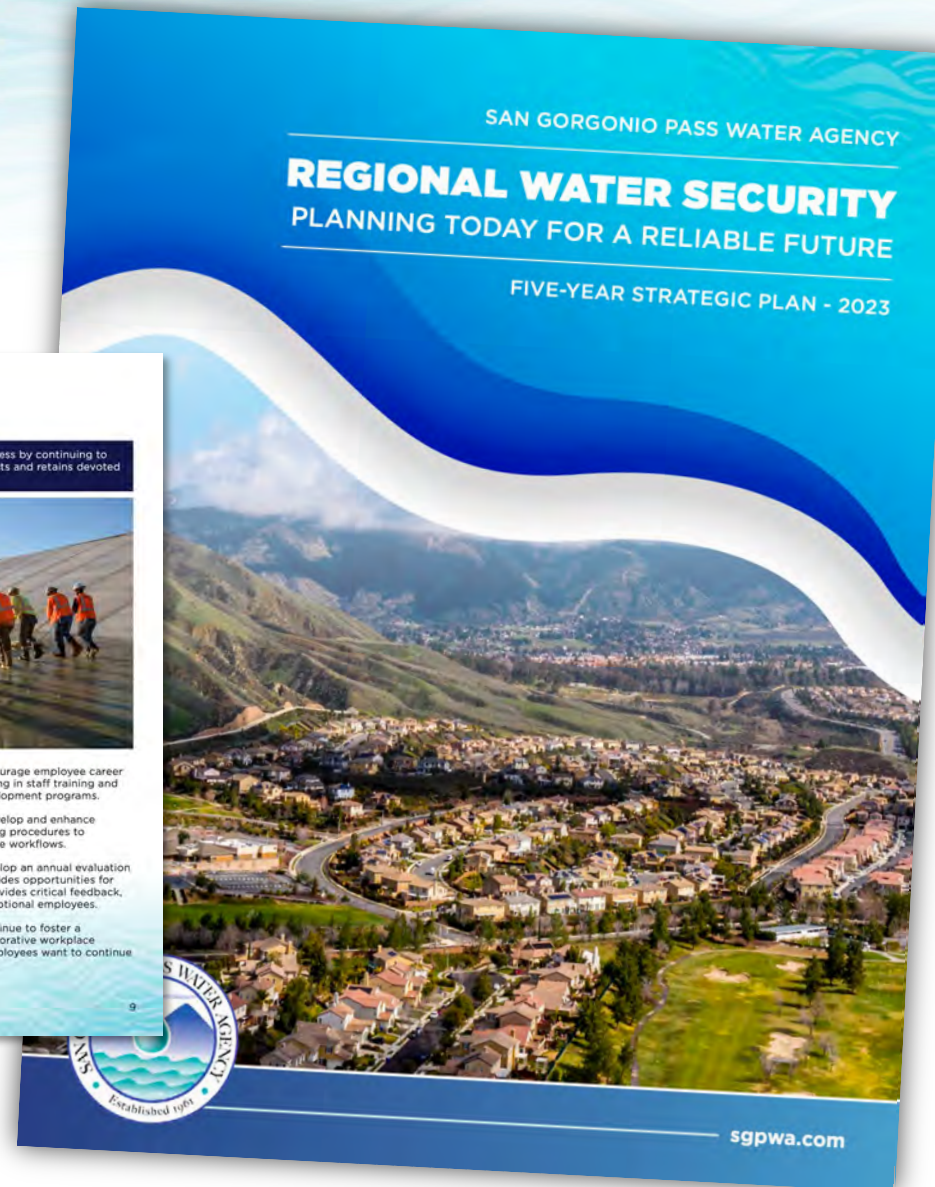
 Overall Progress: **100% complete**

 **On-track** for FY 2023-24 completion

Overall Progress



Goals



Water Supply & Stewardship

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Objective 10: Work with the local adjudication and Groundwater Sustainability Agencies to manage the region's groundwater basins.

6

Personnel

STRATEGIC GOAL 2: Position the agency for long-term success by continuing to grow a welcoming and collaborative environment that attracts and retains devoted employees.



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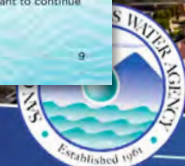
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9



Long-term Success

- Initial milestones to accomplish identified and presented by staff
- Copies made available, as needed
- Six-month progress check-in
- Yearly Strategic Plan review & presentation of annual milestones
 - ✓ Do any milestones need to be adjusted to achieve the goals set forth based on external or internal factors?
 - ✓ Have the goals of the Board fundamentally changed in any way?
 - ✓ How has the organization progressed over the past year?



What We Accomplished