

**CITRUS HEIGHTS WATER DISTRICT  
COMMUNICATIONS AND PUBLIC OUTREACH REQUEST FOR PROPOSAL**

**ADDENDUM #1  
ISSUED 4/15/2019**

On March 25, 2019, the Citrus Heights Water District (“CHWD”) issued a Request for Proposals for the Communications and Public Outreach Program. Pursuant to Section A of the General Terms and Conditions, CHWD issues this Addendum #1 answering properly submitted questions from potential respondents to the Request for Proposals as further described herein. For simplicity, we have grouped similar questions together in order to provide one consistent response to all vendors.

**BUDGET**

1. What is the budget allocated for this effort? If no budget has been set, will CHWD negotiate fees through the interview/selection process?
2. What has been the budget allocated for past, similar communications and public outreach efforts where a consultant was involved? Did this budget cover fees only or fees and paid advertising?
3. Budget. How much budget have you funded for the first year of communications and public outreach? What’s the process for securing additional budget for the other special projects included in the RFP (crisis communications, media training, graphic design, etc.)?
4. Is there an allocated budget for Advertising/Media Buy to accompany the outreach efforts?
5. Has a not-to-exceed or annual budget amount been determined for this contract and, if so, what is it?
6. Can you give an idea of your budget range? Even with the details in the scope of work, a wide range of plans can be put forward making sense at different budget levels. A budget range would let everyone right-size their recommended approach with your resources.
7. What is the proposed budget for the work?

**The District’s 2019 budget for communication services is listed below. Currently, there is not a not-to-exceed to amount. The District would like to better understand the true cost of services associated with the currently proposed communications and outreach program.**

Acct.	Item	2018 Budget	2019 Budget
District Events	Centennial Celebration	\$ -	\$ 10,000.00
Direct Services	Social Media/Website	\$ 13,000.00	\$ 30,000.00
Direct Services	Newsletter Prep	\$ 12,000.00	\$ 23,000.00
Direct Services	Prop 218 Notice Prep	\$ 5,000.00	\$ 6,000.00
Direct Services	Website Redesign	\$ 65,000.00	\$ 65,000.00
Direct Services	Misc	\$ 10,000.00	\$ 5,000.00
Postage	Prop 218	\$ 5,000.00	\$ 4,000.00
Postage	Newsletter	\$ 14,000.00	\$ 12,000.00
Printing Services	Prop 218 Notice	\$ 4,000.00	\$ 2,000.00
Printing Services	Newsletter	\$ 10,000.00	\$ 8,000.00
Printing Services	Misc	\$ 3,700.00	\$ 3,700.00
Printing Services	Media Outreach Ad	\$ 6,000.00	\$ 6,000.00
Materials & Supplies	Community Garden Set up/Promotion	\$ -	\$ 1,000.00
		\$ 147,700.00	\$ 175,700.00

## **AGREEMENT**

1. What is the term of this agreement? Do you expect an end date in 2020? Or is it an ongoing contract with renewals?
2. What is the length of contract for the Communications and Public Outreach Services?
3. What is the entire length of this contract?

**This is an evergreen contract with no set end date. Under the agreement, we can create task orders for new projects with respective scope of services and project budgets.**

## **INCUMBENT**

1. Incumbent. Is there an incumbent firm for this work and if so does the District know whether they intent to pursue this opportunity?
2. Who is the incumbent firm or firms for the current contract?
3. Is there an incumbent or current communications and outreach consultant CHWD is working with? If so, please provide the name of this firm and the number of years the District has worked with them.
4. Can you share the name of the current incumbent?

**The District first contracted with Circlepoint approximately 11 years ago for assistance with website maintenance and newsletter development. Due to increased calls for service in 2015, the Circlepoint contract was updated to include social media management, water efficiency outreach and additional special projects as assigned.**

**In October 2018, the District contracted with Prozio Communications on a limited-term basis to revise its approach to social media management.**

**Circlepoint and Prozio Communications are both welcome to participate in this public, open call for proposals.**

## **OUTREACH PLAN**

1. Has CHWD developed (either internally or through a consultant) annual public outreach plans in the past? If so, please share this plan.
2. Is there a current communications plan CHWD is pursuing that would overlap with the tasks requested in the RFP? If so, please share this plan.
3. Can you provide a copy of the Public Outreach Plan for the Project 2030 Water Main Replacement Study?

**The current scope of services does not include development of annual public outreach plans. We have developed project specific outreach plans for the Project 2030 Water Main Replacement Study (Attachment A) and our 2018 Water Efficiency Program (Attachment B).**

## **STAFFING**

1. Will the consultant be staffing the Centennial events or CHWD staff?

2. Staffing. What internal staff do you have dedicated to communications and public outreach? Who will be the primary point-of-contact for this project?
3. What is the expectation in terms for staffing events? Is it monthly requirement for the consultant or is there a set number of events CHWD?

**The consultant will be expected to provide an event coordinator at select events, such as the Centennial signature event. On a regular basis CHWD participates in a set number of outreach events that are currently and will continue to be staffed by internal staff.**

**The District has three staff members who spend approximately 20% to 25% of their time on communications and public outreach. The communications and public outreach team consists of:**

- **Christopher Castruita, Management Services Supervisor/Chief Board Clerk. Oversees communications and public outreach program, including contract management, overall strategy, and policy and procedure development.**
- **Madeline Henry, Management Services Specialist/Deputy Board Clerk (Primary point-of-contact). Coordinates contract resources, oversees day-to-day work of communications consultant, and works with internal stakeholders to develop and implement communications plan.**
- **Rex Meurer, Water Efficiency Supervisor. Oversees Water Efficiency Programs, including public outreach and education efforts.**

## **MARKET RESEARCH**

1. Is there an existing market research vendor that CHWD currently works with, or is the consultant expected to provide market research?
2. Is there any research that Citrus Heights has completed on the attitudes and perceptions of its customers and other key stakeholders? If so, please share any relevant data or research on these audiences including their demographics and psychographics.

**The District is currently working with Godbe Research to conduct market research for the Project 2030 Water Main Replacement Study. The results of this research will be provided to the selected firm upon completion of the study. This scope does not include additional market research.**

## **RFP LOGISTICS**

1. Do we need to submit print copies of the proposal? If so, how many copies?

**No, all RFP submissions should be in PDF format. Please email submissions to Christopher Castruita, [ccastruita@chwd.org](mailto:ccastruita@chwd.org). See the Proposal Format and Content section of the RFP for additional information.**

2. Consultant Services. Is there a small business set aside and or preference for this contract? Does the district seek to hire a local firm within Sacramento County?

**There is no small business set aside, or preference given. While the District will not penalize a firm that does not have a local presence, it may award points to firms who can demonstrate experience working with local media outlets.**

3. Will a firm be disqualified from consideration if it does not have direct experience with water districts?

**A firm will not be disqualified if they do not have direct experience with water districts. The District may award points to firms who can demonstrate experience working with local governments on similar projects.**

4. Can an agency submit client references that are not from a water district/City water department as long as it's for the same type of services being requested in the RFP?

**Yes, a firm can submit client references from other agencies or organizations.**

5. Will one method of billing (retainer or time/materials) be scored more favorably, or will firms be ranked higher for one method or the other?

**The District is requesting retainer and time/materials proposals from all firms to better understand the state of the market for communications services. The District may use a combination of a retainer and time/materials based on the needs of individual project tasks. Firms will not be ranked higher for preferring one method or the other.**

### **MISCELLANEOUS**

1. Do materials created need to be translated into languages other than English? If so, does CHWD have an in-house or existing vendor that provides these services?

**The District does not need materials to be translated at this time.**

2. What is the average number of participants for your Water Efficiency programs including the CHWD Watersmart classes and Irrigation Efficiency Reviews?

**The average number of participants for WaterSmart classes in 2018 was 25. 89 Irrigation Efficiency Reviews were completed in 2018.**

3. Do you expect the consultant to develop the history installation, or will CHWD be developing the history installation with the consultant's help with communications and outreach?

**The history installation will be designed by the Citrus Heights Historical Society in consultation with the consultant.**

4. Is management of the website (design and content) done in-house or by a consultant? If in-house, is there a need for capacity building for digital media efforts (website, email marketing, social media).

**Management of the website design and content is currently done by a consultant. As part of the website redesign, the District is considering decentralized content management that would be handled by CHWD staff. The consultant would be responsible for capacity building, design and moderation.**

5. Does Citrus Heights use a customer management relationship software or other mailing list management system (can include Excel)?

**The District uses Cogsdale for utility billing and exports excel files of physical and electronic mailing lists as needed.**

6. Role. What balance are you aiming to strike between strategic advisory and implementation/ongoing support?

**Startup would require roughly 50% strategic advisory and 50% implementation support. Overtime, this would move towards 25% strategic advisory and 75% implementation support.**

7. Can you elaborate on the following goal listed for the district's strategic plan - "promote organizational effectiveness to enhance customer service". Specifically what enhancements have been made and how will that be considered in the campaign.

**Please see Attachment C pages 8-9 for a summary of the District's work in this area during 2018. The District's 2019 and 2020 Strategic Plans will be an important tool while developing the communications outreach plan.**

8. Will you rely on your printing resources, or is the consultant expected to provide printing. If so, can you provide expected quantities?

**The consultant is expected to provide printing of the District's newsletter and Prop 218 notice. The District mails nearly 30,000 copies for each individual mailing. The District has been issuing three mailings per year. If the District moves to an electronic newsletter these amounts will change.**

9. Task 3: Website Development Support and Content Management, Page 5 of the RFP pdf: Will hosting fees, any third party apps, email vendor fees, be the responsibility of consultant?

**The District is currently responsible for hosting fees and third party website applications. The District would be open to taking on additional service providers and would hope to negotiate that with the selected firm.**

10. Task 4: Centennial Celebration Development and Programming, Page 6 of RFP pdf: Where you request support to "Develop physical and digital branding and media" and list one deliverable as "Centennial Branding and Media including at least 1 digital video" we assume that "media" means paid and earned for the centennial event. Can you confirm?

**Yes, media is inclusive of paid and earned media and could include additional videos, collateral and marketing materials based on the need of the events.**

11. Task 4: Centennial Celebration Development and Programming, also page 6 of the RFP pdf: You list Mass Notification System Development as a potential special need. We are familiar with mass notification systems but are we correct in assuming that you are requesting support with communications for the system? If not, could you please provide greater detail regarding your needs?

**The District is looking for support with communications and development of a Mass Notification System. This includes capacity building, content and template development, and best practices on emergency communications.**

12. Do you have any existing community partnerships and if so, with whom?

**The District has partnered with the Citrus Heights Historical Society, the City of Citrus Heights, the Citrus Heights Community Garden and local elementary and middle schools for various events and programs. District representatives attends Neighborhood Association meetings annually. District staff members participate in Rotary, Soroptimist, and Kiwanis, and serve on the Chamber of Commerce Board.**

#### **ATTACHMENTS:**

- **Attachment A** – Project 2030 Water Main Replacement Study Outreach Plan
- **Attachment B** – Water Efficiency Program 2018 Outreach Plan
- **Attachment C** – 2018-2021 Strategic Plan 4<sup>th</sup> Quarter Update

# CHWD CUSTOMER ADVISORY COMMITTEE OUTREACH SCHEDULE

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CHWD initiated a Customer Advisory Committee (CAC) to seek community input into the planning process for its two major planning efforts-- replacing water mains and water meters in the District service area. This committee will work with CHWD staff and technical consultants to consider options to replace water mains and meters while considering key factors such as financial and technical issues. After considering policy alternatives, the CAC will present its input on strategies to replace water mains and water meters to the CHWD Board of Directors.

The District will be using a variety of communication tools to share information with the CAC and about the CAC meetings. These tools and the suggested schedule for implementation for each of them are covered below.

## 30 days prior to CAC meeting

An email blast with the meeting date and time should be sent to CAC members and CAC interest list one month prior to the meeting. This will allow CAC members and any interested members of the public to coordinate their schedule around the meeting date and time.

The CAC page of the CHWD website should also be updated to include the meeting date and time.

## Two weeks prior to CAC meeting

An email blast with meeting details should be sent to CAC members and CAC interest list two weeks prior to the CAC meeting. Details should include meeting date, time, location, and topics that will be covered during the meeting.

A Facebook post with the same meeting details should be posted to the Districts profile.

CHWD should also prepare a post for its NextDoor profile with the same information.

The website should be updated with meeting location information, since the CAC meetings are open to the public.

A press release with meeting information should be distributed to local media within the CHWD service area at this time.

## One week prior to CAC meeting

An email blast with the link to the full agenda packet should be sent to CAC members.

A separate email blast with the agenda should be sent to the CAC interest list.

The agenda should be posted on the website. If supporting materials are available they should be posted with the agenda as well.

## Week of CAC meeting

A reminder email blast should be sent to CAC members with a link to the agenda packet and meeting logistic information (reminder that snacks will be provided, a link to the agenda and meeting materials).

A Facebook post reminding readers about the meeting should be posted during the week the meeting will be held. Facebook posts are typically made on a Monday-Wednesday-Friday schedule so the post can be made on the normal posting day prior to the meeting. The post should remind readers of the date/time/location of the CAC meeting.

A post on the NextDoor profile should also be made. It can contain the same information as the Facebook post.

A media advisory will be sent to Citrus Heights print media prior to the meeting. The media advisory will include information about the topics to be covered at the meeting.

## Day after CAC meeting

Any meeting materials distributed at the meeting should be posted to the website as soon as feasible the next morning.

An email blast should be sent out to CAC members thanking them for their participation in the meeting. The email blast can include links to resource materials discussed at the meeting if necessary.

## Within a week following CAC meeting

A Facebook post informing readers of the topics presented at the CAC meeting should be made on the District's Facebook profile. A NextDoor post should also be made and can contain similar content to the Facebook post.

If the CAC meeting resulted in a decision or other actionable items, CHWD should prepare and distribute a press release about the decision or action taken. The press release should be distributed to the media list previously developed for the CAC process.

## Within two weeks following CAC meeting

The video of the meeting should be posted to the District's YouTube page as soon as the video is available. A link to the YouTube page and video can be posted on the District's website, and also on the Facebook profile.

The summary of the CAC meeting should be posted to the District website. A link to the summary and information about the general contents of the summary can be used for Facebook and NextDoor posts.

An email blast should be prepared and distributed with the link to the summary.



# CHWD 2018 WATERSMART WORKSHOP MARKETING PLAN

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## Introduction

CHWD will be offering five Rescape California WaterSmart Landscaping Workshops in 2018, with the following dates and topics to be confirmed:

- April 12, 2018 (6:00 – 8:30pm) - WaterSmart: Getting the Best Yard with the Least Water
- May 19, 2018 (9am-12pm) - WaterSmart: Designing Eco-Friendly Landscapes and Water-Wise Irrigation Systems
- June 28, 2018 (6:00 pm-8:30pm) - WaterSmart: Keeping Your Eco-Friendly Landscape Looking Great with Less Water, Less Work and Fewer Chemicals
- July 1, 2018 (9am-12pm) – Topic TBD
- September 27, 2018 (9am-12pm) – Topic TBD

All of the WaterSmart Landscaping Workshops will be held in room South A at the Citrus Heights Community Center, located at 6300 Fountain Square Drive in Citrus Heights. Online sign-ups will be available on the CHWD website 30 days before each workshop date. Registrations will be processed on a first-come, first-served basis, with preference given to District customers.

The WaterSmart Landscaping Workshops held in 2017 were very popular, and the following plan will serve as a roadmap for designing and implementing an effective marketing campaign for 2018 to inform the general public; including customers, visitors to the CHWD website and Social Media platforms, and other stakeholders; about all of the WaterSmart workshops and encourage sign-ups for each of the workshops.

## Marketing Strategy

The information campaign will target as wide an audience as possible, through a combination of website updates and pop-ups, regular and promoted Social Media posts on CHWD's Facebook and NextDoor pages, informational e-blasts, a press release and targeted media outreach, as well as options for newspaper advertising in local publications, distribution of workshop flyers to local libraries and community centers and working with recommended key partners to share workshop information on their websites or Social Media pages.

The marketing goals for the workshop program and participants include:

- 35 attendee sign-ups per class
- Increase knowledge about the efficient use of water outdoors
- Increase awareness of this and other water efficiency programs
- Identify program champions for future marketing

## Communication Channels

To generate awareness of and interest in the workshops, the communications channels for the marketing campaign will promote each event and help to raise awareness of the entire workshop series whenever possible. Any available CHWD informational or promotional materials about the workshops will be used to engage people at key online and physical locations throughout the year. We also recommend working with key partners to maximize outreach to different audiences. The communication channels are outlined in the table below:

Channel	Materials
Print Collateral	SmartWater Landscape Workshop Flyer to be developed by CHWD
Digital	CHWD Website Updates and Pop-Up Ads, Social Media Posts on Facebook and NextDoor platforms, Eblasts
Advertising	<ul style="list-style-type: none"> <li>• Facebook Promoted Posts – est. cost \$125 each</li> <li>• One newspaper advertisement in local publications: – est. cost for Citrus Heights Sentinel - \$175 and est. cost for Citrus Heights Messenger - \$500 for single ad run, \$375 each for two or more ad runs.</li> </ul>
Non-traditional	Posting Copies of Flyer at Local Libraries and Community Centers
Earned Media	Developing press releases, performing media outreach and reporting on coverage
Suggested Key Partners	<ul style="list-style-type: none"> <li>• City of Citrus Heights Website Home Page: <a href="https://www.citrusheights.net/">https://www.citrusheights.net/</a></li> <li>• SaveOurWater Facebook Page: <a href="https://www.facebook.com/SaveOurWaterCA/">https://www.facebook.com/SaveOurWaterCA/</a></li> <li>• BeWaterSmart.Info (<a href="https://www.facebook.com/bewatersmart/">https://www.facebook.com/bewatersmart/</a>)</li> <li>• Others TBD</li> </ul>

## Outreach Schedule

- Initial Press Release to be distributed to local Media outlets once all dates for workshops are confirmed.
- **30 days prior to each workshop**
  - Update CHWD Website with Workshop information/open online registration
  - Add Website Pop-ups for Workshop
  - Post first round of Workshop information on Facebook and NextDoor
  - Confirm Run Dates for Promoted Post on Facebook
  - Distribute Copies of Flyers to Local Libraries and Community Centers

- Ask Key Partners to add Workshop information to their Websites/Facebook profiles
- **Two weeks prior to each workshop**
  - Distribute Press Release to local Media outlets
  - Post second round of Workshop information on Facebook and NextDoor
  - Distribute promoted post activity report to CHWD staff
  - Distribute e-blast with Workshop information
- **One week prior to each workshop**
  - Confirm total workshop sign-ups
  - Post third round of Workshop information on Facebook and NextDoor
  - Distribute promoted post activity report to CHWD staff
- **One week post workshop**
  - Distribute promoted post activity report to CHWD staff
  - Distribute Google Analytics report to CHWD staff (Note: Analytics will be tracked for each class, as well as for the entire series) Distribute Press Coverage Media Report to CHWD staff
  - Assess effectiveness of marketing tools and adjust accordingly for next phase

## Evaluation Metrics

The effort will also include a clear strategy for measuring the impact of these marketing tools, using timely, attainable, and relevant metrics. Data collection and assessment tools will include Google analytics, Facebook results and insights, and assessing workshop sign-up rates, to determine the effectiveness of the marketing campaign. Metrics for assessing the effectiveness of the marketing campaign will include determining whether 35 sign-ups were received for each class. We recommend using the Google Shortener, to create new links to take people directly to the sign up page (not to the Events page), including one link for Facebook, one for the CHWD website and others as needed. This will allow the team to see how many times the shortened URL was clicked, and exactly how many people came from which other sites. This information can then be used in conjunction with other analytics tools, to measure the effectiveness of the advertising tools and marketing strategy.

## Budget

Qty.	Item	Unit Cost	Item Cost
5	Facebook Promoted Post for Event	\$125	\$ 625
1	Media Ad – CH Sentinel	\$175	\$ 175
1	Media Ad - CH Messenger	\$375	\$ 375
	Staff time estimated at 10 hours for developing, placing and paying for ads and promoted posts (assumes maximum of 2 rounds of editing)	X applicable staff rate*	*TBD for new staff
	Hard costs for Print/Digital Advertising:	:	\$1,175

**Citrus Heights Water District**  
**2018-2021 STRATEGIC PLAN 4<sup>th</sup> QUARTER UPDATE**

Wednesday, January 16, 2019

CITRUS HEIGHTS WATER DISTRICT □ 2018 S A C O C S

**THREE-YEAR GOAL: PROJECT 2030 – WATER MAIN IMPROVEMENTS**

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	1 2018	Q3 2018	Complete asset inventory into S	Missy P. Paul D. orey S. amar D.	<b>COMPLETE</b>
2	Q4 201	Q4 2019	Complete Customer Advisory Committee CAC Process	Missy P. Consultant e M. Hilary S. ay . David . Paul D. Susan S. rian H. Chris C. amar D.	Orientation Meeting CAC Meetings 1 2 and 3 complete. CAC Meeting scheduled for 02 0 19.
3	Q3 201	Q4 2019	Complete Pro ect 2030 Study	Missy P. Consultant Hilary S. David . Paul D. Susan S. rian H. Chris C. amar D. orey S.	Asset nventory and water demand pro ections complete. Main eplacement indings and Costs complete. CHWD to present Spending and unding options for CAC to develop alternatives.
4	Q3 2018	2 2019	ransmission Main valuation P	Missy P. Consultant David . Paul D. rian H. amar D. orey S.	ransmission Main valuation isk Analysis in progress.
	Q3 2018	2 2019	Creek Crossing nspection Program	Missy P. Consultant David . Paul D. rian H. amar D. orey S.	Creek Crossing nspection to egin in Spring 2019.

**Citrus Heights Water District  
2018-2021 STRATEGIC PLAN 4<sup>th</sup> QUARTER UPDATE**

Wednesday, January 16, 2019

**CITRUS HEIGHTS WATER DISTRICT □ 2018 STRATEGIC OBJECTIVES**

**A THREE-YEAR GOAL: WATER EFFICIENCY**

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	1 2018	2019	<ul style="list-style-type: none"> <li>Meter replacements</li> <li>a. Study Partnerships</li> <li>b. Grants</li> <li>c. Testing</li> </ul>	<ul style="list-style-type: none"> <li>De M. David</li> <li>Susan S.</li> <li>Hilary S.</li> <li>rian H.</li> <li>elly D.</li> </ul>	<ul style="list-style-type: none"> <li>A. A Multi-agency Consortium MO has been executed by eleven water agencies in order to participate in a regional Water Meter Replacement Study. The levels of participation for each agency will be finalized by 12/2019.</li> <li>B. A review of grants will be looked at to implement the Meter Replacement Advanced Planning Study.</li> <li>C. Completed meter testing for meters 3 inches and larger. A list of meters 3 inches and larger are being prioritized for replacement.</li> </ul>
2	1 2018	Q4 2018	<ul style="list-style-type: none"> <li>Tracking state laws and regulations and taking positions as appropriate.</li> <li>a. Updates</li> <li>b. Compliance</li> <li>c. Reporting</li> </ul>	<ul style="list-style-type: none"> <li>David</li> <li>De M.</li> <li>Hilary S.</li> <li>WA</li> </ul>	<p>Staff has created a new section of the report Legislative Regulatory Update to track and monitor proposed regulatory and legislative changes affecting the District. Staff will continue to monitor and update the board as regulatory and legislative changes occur. Staff will continue to monitor WA and ACWA as regulatory and legislative changes occur.</p> <p>Regional Water Authority selected Ryan Okian to be their new Legislative and Regulatory Affairs Manager. District staff met with Mr. Okian on 11/13/18 in order to introduce him to the primary legislative concerns of the District and to provide him with a direct staff liaison for legislative issues.</p>

**Citrus Heights Water District  
2018-2021 STRATEGIC PLAN 4<sup>th</sup> QUARTER UPDATE**

Wednesday, January 16, 2019

CITRUS HEIGHTS WATER DISTRICT □ 2018 S A C O C S

**A THREE-YEAR GOAL: WATER EFFICIENCY (CONTINUED)**

*Objectives to be Completed in the 2018 Year*

#	START	END	WHAT	WHO	COMMENTS
3	1 2018	2018	Public Outreach— raining	Chris C. e M. Missy P David . Hilary S. elly D. CirclePoint	ive landscape classes were held this year. he final class was held 08 2 18. Over 1 0 people attended the WaterSmart class series. WaterSmart class content venue location and schedule are eing developed for 2019.
4	1 2018	Q4 2018	Safety a. n-house . Pu lic c. Compliance	elly D. Chris C. David . e M. Safety Committee ACWA P A	he following in-house trainings have een completed irst Aid CP A D As estos Cement Pipe ACP espirator Ha ard Communication MSDS lood orne Pathogens and ire tinguisher.  pdates to the n ury llness Prevention Program PP were completed in anuary 2018. pdates include raffic Control lagger and lood orne Pathogen.  nstalled S MS MS compliant uilding identification signage on all corporation yard uildings.  Staff is currently updating the District s mergency Operations Plan.

**Citrus Heights Water District**  
**2018-2021 STRATEGIC PLAN 4<sup>th</sup> QUARTER UPDATE**

Wednesday, January 16, 2019

CITRUS HEIGHTS WATER DISTRICT □ 2018 S A C O C S

**A THREE-YEAR GOAL: *WATER EFFICIENCY (CONTINUED)***

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
	1 2018	2 2019	Risk Management and Loss Prevention Work plan Development	Chris C. Kelly D. Lee M. Susan S. Hilary S.	The Safety Committee completed a risk analysis to assess the specific risks a loss prevention program would address.  A Safety Security consultant conducted a Security Assessment of the corporation yard on Monday October 29 2018.
	1 2018	Q4 2018	Identify and Apply for grant funding a. WA b. District c. Partnerships	David L. Brian H. Missy P. Lee M. WA Susan S. Alberto P.	Applied for grant funding through the Integrated Regional Water Management Plan (IRWMP). Several projects were identified as being applicable for these grant funds. The District is pursuing partnerships with other regional agencies to identify further funding opportunities.

**Citrus Heights Water District  
2018-2021 STRATEGIC PLAN 4<sup>th</sup> QUARTER UPDATE**

Wednesday, January 16, 2019

**CITRUS HEIGHTS WATER DISTRICT □ 2018 STRATEGIC OBJECTIVES**

**THREE-YEAR GOAL: WATER SUPPLY**

*Objectives to be Completed in the 2018 Year*

#	START	END	WHAT	WHO	COMMENTS
1	Q4 2018	Q4 2019	Amend pdate Water Supply Agreement	Hilary S. David . Susan S. rian H.	Staff and Legal Counsel met with the oard and are preparing to meet with S WD-Wholesale regarding a Shortage Plan Mutual Aid and Water Supply Agreement.
2	Q3 2018	On- going	Active engagement in Sustaina le roundwater Management Act S MA echnical Advisory roup	David . rian H. Hilary S.	Staff has een attending following the roundwater Sustaina ility Plan SP development at the monthly orth American Su - asin echnical meetings.
3	2 2018	Q4 2018	Consider A uifer Storage and ecovery AS etrofit feasi ility	David . rian H. Hilary S. Missy P. Susan S. ng. Consultant	District staff worked with Sacramento roundwater Authority S A to develop an for a regional AS feasi ility study and has assisted S A in the consultant selection process.  Staff anticipates the study to egin in mid-2019.
4	Q3 2018	Q4 2019	Design Well	David . rian H. Hilary S. Missy P. Susan S.	Contingent on completion of property purchase. Staff anticipates close of escrow on the property to occur in 1 2019.



**Citrus Heights Water District  
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Wednesday, January 16, 2019

CITRUS HEIGHTS WATER DISTRICT □ 2018 S A C O C S

**THREE-YEAR GOAL: WATER SUPPLY (CONTINUED)**

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
	Q3 2018	Q4 2018	Obtain Well 8 property	David . rian H. Hilary S. Missy P. Susan S. and real state rep.	A right of entry Option to Purchase Agreement with a property owner was executed on 12/20/18.  A test-hole will be drilled on the site in 1/2019 to determine site viability.
	Q3 2018	Q4 2019	Revisit and Develop Intertie Agreements	David . rian H. Hilary S. Susan S. Missy P.	Staff and Legal Counsel have completed an initial review of the District's Intertie Agreements. Staff has identified a neighboring Water District as the first intertie project to tackle.
	Q3 2018	Q2 2018	Complete two well rehabilitations and other upgrades	David . rian H. Hilary S. Missy P. Susan S.	Palm and Sunrise rehabilitation projects at 90% complete. Final water sampling of the wells is taking place prior to putting the wells back in service. Palm Well was upgraded to a submersible pump and motor.
8.	Q2 2018	Q4 2018	Research water rights	Hilary S. David . rian H. Susan S. Chris C.	<b>COMPLETE</b>

**Citrus Heights Water District  
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**CITRUS HEIGHTS WATER DISTRICT □ 2018 STRATEGIC OBJECTIVES**

**THREE-YEAR GOAL: CAPITAL IMPROVEMENTS PROGRAM**

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	1 2018	Q4 2018	Water distribution mains and services	Missy P. Paul D. Amar D. Corey S. David .	2 projects completed. 1 project in construction phase. 1 project in design phase.
2	Q4 2018	2 2019	Review the C A process for C Ps	Missy P. Paul D. Amar D. Corey S. Hilary S.	Objective to begin in 1 2019.
3	1 2018	Q4 2018	Develop P for assessment review Project	Missy P. Amar D. Paul D. Corey S. Hilary S.	Preparing Draft Request for Proposal. Review of Draft Request for Proposal in 1 2019.
4	1 2018	Q4 2018	Develop P for review of annexations LA CO and annexations	Missy P. Amar D. Paul D. Corey S. Hilary S.	Preparing Draft Request for Proposal. Review of Draft Request for Proposal on 02 13 19.
	2 2018	2 2019	Develop the Corporation Board Facilities Master Plan including ADA compliance	Paul D. David . Missy P. Susan S. Hilary S. Consultant	Preparing Draft Request for Proposal. Review of Draft Request for Proposal on 01 1 19.
	Q3 2018	2 2019	Develop a plan to dispose of surplus well sites	David . Brian H. Susan S. Amar D.	Staff and Legal Counsel have completed an initial review of the District's surplus well sites. District staff anticipates updating the Board with a proposed decision matrix for the disposal of the well sites in first half of 2019.

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**CITRUS HEIGHTS WATER DISTRICT ☐ 2018 STRATEGIC OBJECTIVES**

**THREE-YEAR GOAL: ORGANIZATION-WIDE OBJECTIVES**

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
1	Q3 2018	1 2019	Server upgrade	Jeff O. Susan S.	Server upgrade complete. Upgrade of physical servers is 100% complete. Network switches 100% complete. Virtual servers are 0% complete.
2	Q3 2018	2 2019	Issue P for Website redesign	Chris C. Madeline H. Jeff O. Susan S. Hilary S.	Staff is working to bring on board a new communications firm to assist with this project.
3	Q3 2018	2 2018	Program review	Chris C. Susan S. Hilary S.	<b>COMPLETE</b>
4	1 2018	Q4 2018	Support the 2018 Board Member Candidates Orientation and Election process	Chris C. Madeline H. Susan S. Hilary S.	Resolution for election approved by the board in June 2018. CHWD participated in Leadership Citrus Heights at CAC meetings and at Neighborhood Association meetings in Spring 2018 to promote upcoming election.
	Q4 2018	Q4 2018	Hold Organizational development and employee training Opportunities	Chris C. Susan S. Hilary S. Missy P. David .	Team worked with Ryce Consulting to provide trainings to the general staff. 3 trainings completed in July and October 2018.
	Q4 2018	Q4 2018	CHWD Policy review	Chris C. Susan S. Hilary S. Missy P. David .	Completed update of Policy 2300 3000 932 00 and 180.
	1 2018	3 2019	Re-evaluate Model financial Model for 2020 budget	Susan S. Alberto P. Hilary S. Missy P. David . Chris C. e M. rian H. Paul D. Consultant	Contracted with aftelis for analysis. Expect to complete groundwater cost analysis in 3.

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CITRUS HEIGHTS WATER DISTRICT    □    2018   S   A   C   O   C   S

**THREE-YEAR GOAL: ORGANIZATION-WIDE OBJECTIVES (CONTINUED)**

<i>Objectives to be Completed in the 2018 Year</i>					
#	START	END	WHAT	WHO	COMMENTS
8	1 2018	Q4 2019	Enterprise-wide document scanning and indexing	Jeff O. Chris C. Susan S. Consultant Missy P. David	Project team has been created and is beginning work on ERP development with the goal of issuing the ERP by 01/19.
9	1 2018	2 2018	Hire a Water Efficiency technician 1 new position	Chris C. e M. Sr. Mgmt. Svc. Spec. S	<b>COMPLETE</b>