

# Citrus Heights Water District Strategic Planning Process Overview

Customer Advisory Committee Meeting  
April 30, 2024

# Public Comments

# Tonight's Agenda

- Welcome
- Public Comments
- Agenda Review
- Strategic Planning Overview
- Review/update Issues, Factors, and Trends
- Next Steps
- Public Comments
- CAC Members' Take-aways
- Adjourn

# Strategic Planning Overview

# What is Strategic Planning?

Strategic Planning is the **ongoing** process of the guiding members of an organization using available knowledge to define and document the organization's intended direction.

# Why CHWD Conducts Strategic Planning?

We plan so that **future generations**  
**can enjoy water** like we do today.

# Why Conduct Strategic Planning?

- Create a clear shared organizational direction
- Get everyone on the same page of understanding
- Confront difficult choices and examine why each decision is made
- Ensure that goals are backed by data and sound reasoning
- Prioritize everyone's efforts
- Create a basis for effectively allocating resources

# Best Practices

- There is no one “perfect” approach
- Customize to the team
- Plan annually
- Monitor results quarterly
- Underscore the importance
- Define roles



# Best Practices Continued

- Use a neutral facilitator
- Assign a staff coordinator
- Tell the world!
- Eliminate confirmation bias
- Plan THEN budget

# CHWD's Strategic Planning Process Framework



➤ **Conduct Strategic Planning Session** ◀

create an open environment

assess internal and external factors

- ✦ accomplishments & strengths
- ✦ issues, factors & trends

reference District's Mission • Vision • Values • Principles

➔ develop 3-year goals

develop one-year objectives to meet

A central grey rounded rectangle contains the main steps of the process. It starts with 'Conduct Strategic Planning Session' in a blue box with arrows pointing outwards. Below this, it lists 'create an open environment' (with 'open environment' underlined), 'assess internal and external factors' (with two bullet points: 'accomplishments & strengths' and 'issues, factors & trends'), 'reference District's Mission • Vision • Values • Principles', 'develop 3-year goals' (with an arrow pointing right), and 'develop one-year objectives to meet' (with an arrow pointing up).



# Steps



# CHWD's Desired Outcomes

CHWD's desired outcomes are to work together to develop a 3-Year Strategic Plan that will **help the District better serve customers today and tomorrow**

# Get Ready to Plan

- Determine who will be involved in the process
- Contract with a neutral Strategic Planning facilitator
- Set the date and timing
- Secure the location and determine logistics
- Invite the participants and calendar the date
- Gather or develop relevant background information
- Develop the agenda and activities

# Create a Welcoming Open Environment

Ensure that the Strategic Planning participants are comfortable working together and expressing their views and perspectives

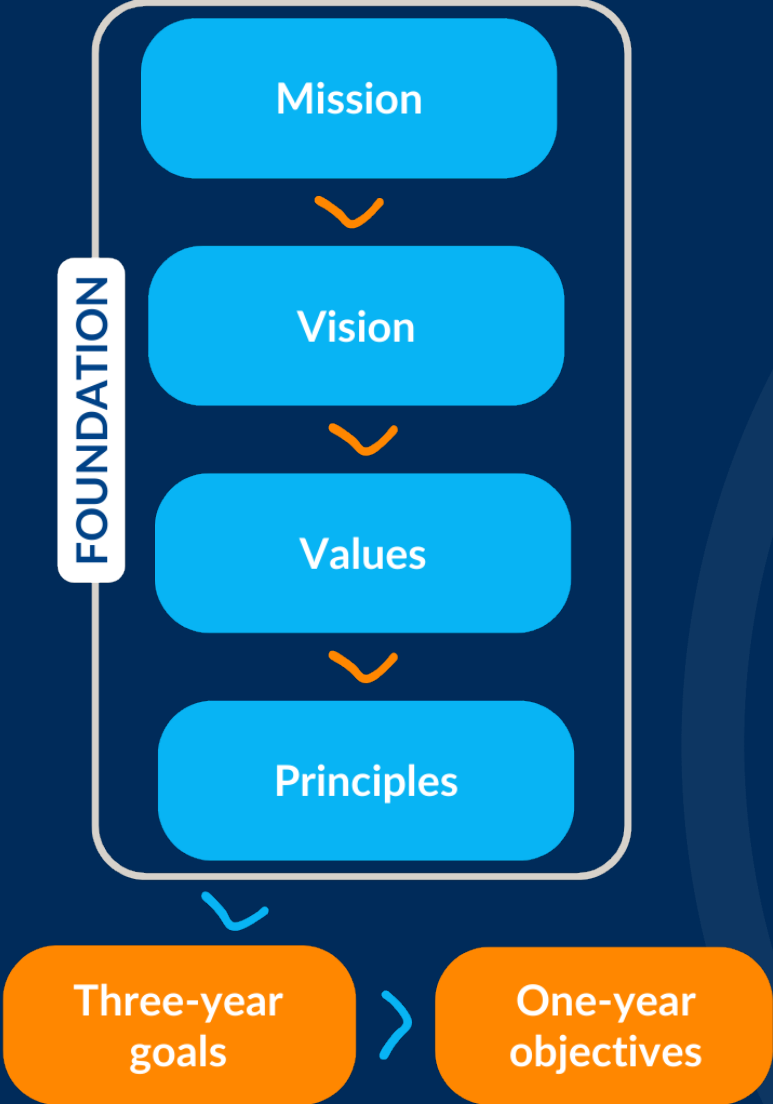
# Assess Internal and External Factors

The role of this activity\* is to gather relevant information and get all the participants on the same page of understanding before moving forward:

- Assess the District's accomplishments and strengths
- Identify and assess Issues, Factors, and Trends that do or could affect the District

\*Sometimes called a **SWOT analysis** (Strengths, Weaknesses, Opportunities, Threats)

# CHWD Strategic Plan At A Glance





# CHWD Strategic Foundations

## Mission

*The mission of the Citrus Heights Water District is to furnish a dependable supply of safe, quality water delivered to its customers in an efficient, responsive, and affordable manner.*

# CHWD Strategic Foundations

## Vision

*Citrus Heights Water District will continue to evolve as a dynamic provider of municipal water service to assure that our customers receive the best value without giving it a second thought.*

# CHWD Strategic Foundations

Values

*Integrity, Teamwork, Dependability,  
Accountability, Professionalism*

# CHWD Strategic Foundations

## Principles

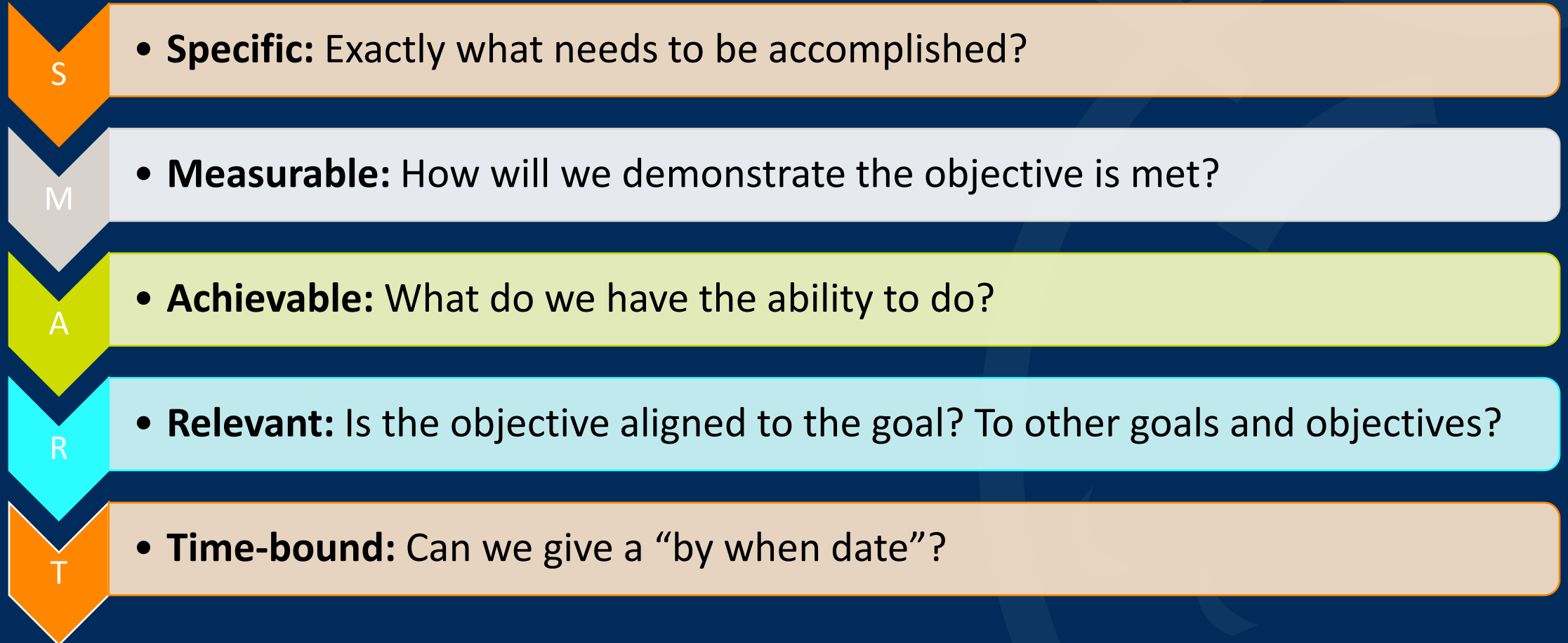
- *Educate and engage customers*
- *Safeguard multi-generational investments in District assets and water supply sources*
- *Fulfill the District's Mission by advancing local community decision making*
- *Protect customers from unfair ongoing cost burdens and oppose unfunded mandates*

# Three-Year Goals

## 2024-2027 Goals

1. Manage and Diversify A Dependable Water Supply and Empower Customers to Use Water in an Efficient Manner
2. Manage The Improvement of and Reinvestment in District Infrastructure and Facilities
3. Promote Organizational Effectiveness and Enhance Customer Service
4. Engage Customers and Communicate The District's Priorities and Value-Added Programs

# What Are SMART Objectives?



# 2024 Objectives For a 3-Year Goal

- Manage and Diversify a Dependable Water Supply and Empower Customers to Use Water in an Efficient Manner

## 2024 Objectives

1. Complete construction for well site 7, which will include Aquifer Storage and Recovery (ASR).
2. Begin design for well site 8.
3. Pursue acquisition of 1-2 potential sites for wells/water/asset storage.
4. Host three in-person and two online Water Smart classes.

# Action Plans to Achieve the Objectives

Action Plans are part of the District's Annual Work Plan. Action Plans include the specific "*what, who, and when*" for each Objective.



# District Budget

- **While the budget is not formally a part of the District's Strategic Plan, all resource decisions above and beyond the District's daily operations for the year are based upon the Strategic Plan**

# Resourcing

PLAN



ID GAPS



BUDGET



# Implement the Strategic Plan

Just do it



**GO!**



**MONITOR**

# Benefits of Strategic Planning

- Shared direction and priorities
- All on the same page and understand their roles
- Increased communication, understanding, and teamwork
- Able to track progress toward the goals and objectives
- Able to shift direction if necessary

## Team Activity

**In preparation for the June 18 CHWD Strategic Planning process, we will identify and update significant Issues, Factors, and Trends that do or could affect the District.**

# Next steps for the CAC

# CAC 2024 Tentative Future Meeting Dates

- **June 18 CHWD Strategic Planning Meeting**  
**6:00-9:00 PM @ Citrus Heights Community Center – South Flex Rooms**  
*Dinner available at 5:00 PM*
- **July 16 - Dinner meeting: Receive presentation from SJWD's Director of Operations (Presentation topics: Folsom Lake, dam and SJWD water treatment plant)**
- **Sept 10 - Dinner meeting: budget process**
- **Oct 8 - Dinner meeting: regional collaboration/statewide issues**
- **Dec 9 - Dinner meeting: year-in-review**

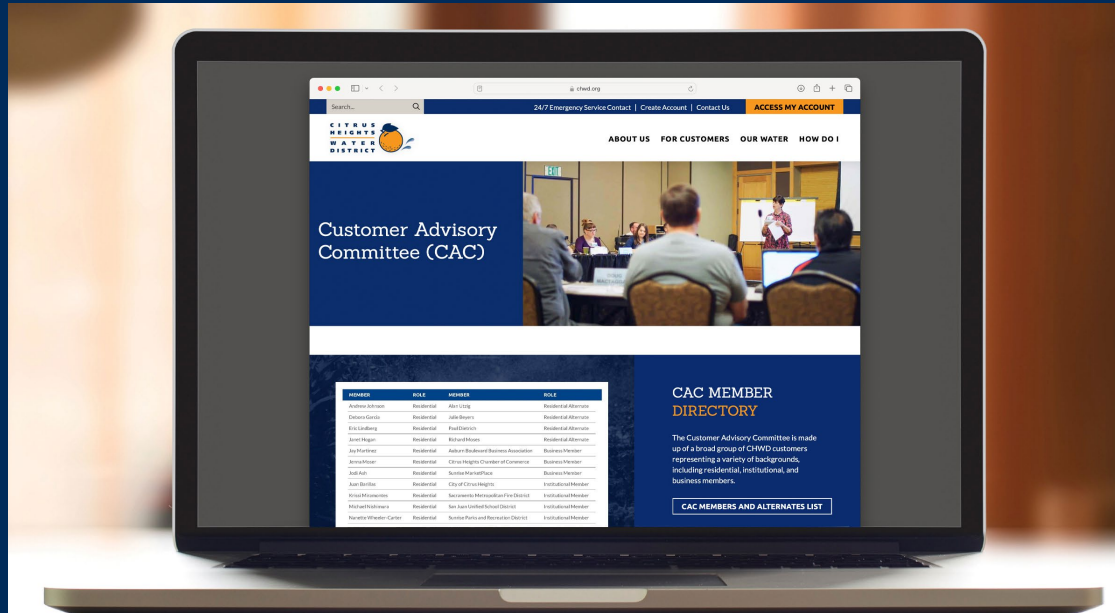
# Public Comments



# CAC Members' Take-aways

# CAC Webpage

<https://chwd.org/cac>



Questions?

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