

FY 2023 STRATEGIC PLAN UPDATE

WEDNESDAY, JUNE 7, 2023

BOARD OF DIRECTOR'S MEETING, ITEM NO. 23-060



**WEST COUNTY
WASTEWATER**

STRATEGIC PLAN

FY 2021 - FY 2025

Embracing the future by planning today...



WEST COUNTY
WASTEWATER



Strategic Goal 1: *Infrastructure Strategy & Performance*



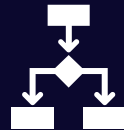
Strategic Goal 2: *Environmental Stewardship*



Strategic Goal 3: *Financial Viability*



Strategic Goal 4: *Information Systems & Data Management*



Strategic Goal 5: *Operational Optimization*



Strategic Goal 6: *Community Image*

STRATEGIC GOAL 1: INFRASTRUCTURE STRATEGY & PERFORMANCE



10-May-2023
7:37 AM





Strategic Goal 1: Infrastructure Strategy & Performance

Objective 1: Create an organization-wide Asset Management Plan








Milestones Completed Through June of 2023:

- ☒ Completed Needs Assessment for a CMMS
- ☒ Obtained portal into the Hanson database for plant staff to start review
- ☒ Evaluated Current CMMS IPS – Hanson for meeting organization's needs w/ upgrades
- ☒ Created process and schedule to ensure SOPs remain current and in use; develop a way to ensure new ones are created as needed
- ☒ Entered into a contract with CMMS vendor
- ☒ Completed Asset Registry

Strategic Goal 1: Infrastructure Strategy & Performance

Objective 2: Complete a comprehensive set of organization-wide Standard Operating Procedures

Milestones Completed Through June of 2023:

-  **Inventoried existing Standard Operating Procedures**
-  **Audited best practices and incorporate findings into SOP review**
-  **Standardized SOP format**
-  **Identified needed Standard Operating Procedures**
-  **Drafted SOPs identified as missing or needing to be updated**
-  **Developed and implemented Plant Odor and H2S Monitoring Plan**
-  **Developed and implemented a WCW-wide odor complaint response, tracking, and mitigation plan**
-  **Developed system for regularly reviewing and updating SOP's**

Strategic Goal 1: Infrastructure Strategy & Performance

Objective 3: Prioritize and implement Capital Improvement Projects to increase system reliability

Milestones Completed Through June of 2023:

- ☒ **Created an internal prioritization system and standards**
- ☒ **Prioritized current CIP**
- ☒ **Evaluated and determined viability of ESCO Project**
- ☒ **Updated CIP**
- ☒ **Entered into an agreement for ESCO Project**
- ☒ **Revised WCW code to ensure legal authority over sewer use**

Strategic Goal 1: Infrastructure Strategy & Performance

Objective 4: Develop comprehensive preventative maintenance schedules

Milestones Completed Through June of 2023:

- ☒ Identified Nexus between CMMS and preventative maintenance records
- ☒ Completed development of equipment list for plant and lift stations
- ☒ Ensured maintenance practices are generally consistent with original equipment manufacturers' (OEM) recommendations
- ☒ Developed Preventative Summer Maintenance Schedule

Strategic Goal 1: Infrastructure Strategy & Performance

Objective 5: Complete the implementation of a new capital project delivery system

Milestones Completed Through June of 2023:

- ☒ Reviewed draft document through internal stakeholders and garner feedback
- ☒ Developed rollout strategy
- ☒ Facilitated training workshop
- ☒ Implemented beta testing of system

Strategic Goal 1: Infrastructure Strategy & Performance

Objective 6: Enhance partnerships with local public agencies, trade organizations, municipalities, and other entities

Milestones Completed Through June of 2023:

- ☒ Improved utility coordination meeting attendance consistency, identified personnel accountability
- ☒ Created an inventory of current interagency agreements
- ☒ Completed a review and update of interagency agreements, as identified
- ☒ Updated WCA JPA

Strategic Goal 1: Infrastructure Strategy & Performance

Objective 7: Develop a comprehensive organization-wide safety program

Milestones Completed Through June of 2023:

- ☒ **Reestablished regular meetings for the Safety Committee**
- ☒ **Issued RFP for safety consultant to develop a work plan**
- ☒ **Recruited and hired Health & Safety Coordinator**

STRATEGIC GOAL 2: ENVIRONMENTAL STEWARDSHIP









Strategic Goal 2: Environmental Stewardship

Objective 1: Implement the Climate Action Plan

Milestones Completed Through June of 2023:

- ☒ Entered into an agreement with the San Francisco Bay Restoration Authority for planning for the Living Levee (Sea Level Rise Protection Project)
- ☒ Issued RFP for project planning team for the Living Levee (Sea Level Rise Protection Project)

Strategic Goal 2: Environmental Stewardship

Objective 2: Ensure employees reflect the organization's environmental stewardship values

Milestones Completed Through June of 2023:



Formalized remote work arrangements



Developed Green Team and established an Office Environmental Steward

Strategic Goal 2: Environmental Stewardship

Objective 3: Strengthen environmental and public health educational programs

Milestones Completed Through June of 2023:



Built plan for flushable(s) and FOG outreach



Ensured the organization is following basic public services, recycling practices

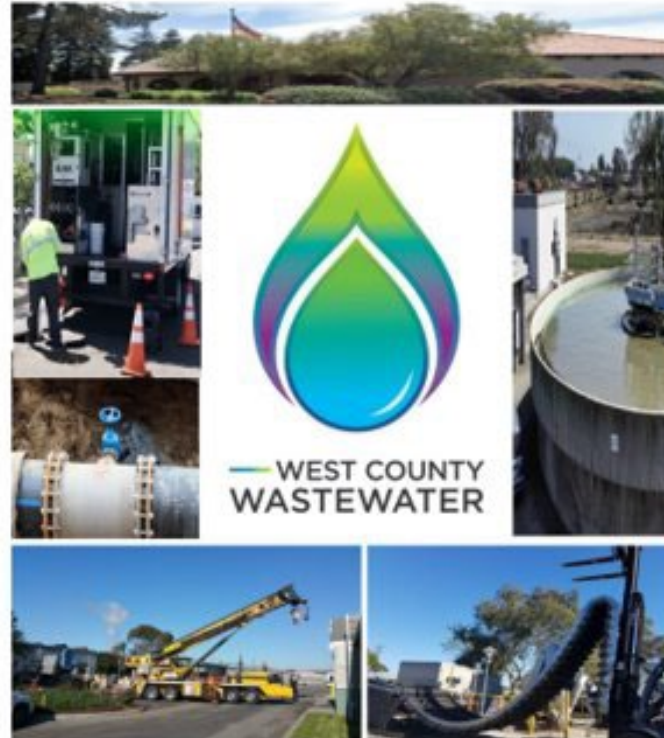
STRATEGIC GOAL 3: FINANCIAL VIABILITY



WEST COUNTY
WASTEWATER

PURCHASING POLICY

WEST COUNTY WASTEWATER DISTRICT RICHMOND, CALIFORNIA BIENNIAL BUDGET FISCAL YEARS 2022 & 2023



The Government Finance Officers Association
of the United States and Canada

presents this

CERTIFICATE OF RECOGNITION FOR BUDGET PREPARATION

Justin Lovell, Director of Administrative Services
West County Wastewater District, California



The Certificate of Recognition for Budget Preparation is presented by the Government Finance Officers Association to those individuals who have been instrumental in their government unit achieving a Distinguished Budget Presentation Award. The Distinguished Budget Presentation Award, which is the highest award in government budgeting, is presented to those government units whose budgets are judged to adhere to program standards.

Executive Director

Christopher P. Morrell

Date: March 18, 2022



WEST COUNTY WASTEWATER DISTRICT
Richmond, CA

ANNUAL COMPREHENSIVE FINANCIAL REPORT

For the Fiscal Year Ended
June 30, 2021

Prepared by:
Administrative Services Department



GOVERNMENT FINANCE OFFICERS ASSOCIATION

Distinguished Budget Presentation Award

PRESENTED TO

West County Wastewater District
California

For the Biennium Beginning

July 01, 2021

Christopher P. Morrell
Executive Director

Strategic Goal 3: Financial Viability

Objective 1: Develop comprehensive financial policies

Milestones Completed Through June of 2023:

- ☒ Review and update existing financial policies, including refunds and adjustments
- ☒ Updated reserves financial policies to set aside reserves for future needs
- ☒ Developed the budget document to link more closely with the organization's financial policies

Strategic Goal 3: Financial Viability

Objective 2: Evaluate rate and fee structure

Milestones Completed Through June of 2023:

- ☒ Compared sewer rates to Contra Costa County agencies
- ☒ Developed a five-year sewer rate plan
- ☒ Initiated study to revise connection fees
- ☒ Finalized Capacity Charge Study

Strategic Goal 3: Financial Viability

Objective 3: Enhance financial reporting

Milestones Completed Through June of 2023:

- ☒ Implemented Simpler Systems Software
- ☒ Rolled out Simpler Systems to key employees
- ☒ Created financial dashboard including graphs and graphical elements to track progress
- ☒ Identified financial benchmarks and metrics for the annual budget reporting

Strategic Goal 3: Financial Viability

Objective 4: Evaluate billing process and procedures

Milestones Completed Through June of 2023:

- ☒ Documented current billing process for residential, commercial, and industrial customers
- ☒ Conducted a review of financial and accounting procedures
- ☒ Transition sewer permit payments to electronic invoices

STRATEGIC GOAL 4: INFORMATION SYSTEMS & DATA MANAGEMENT

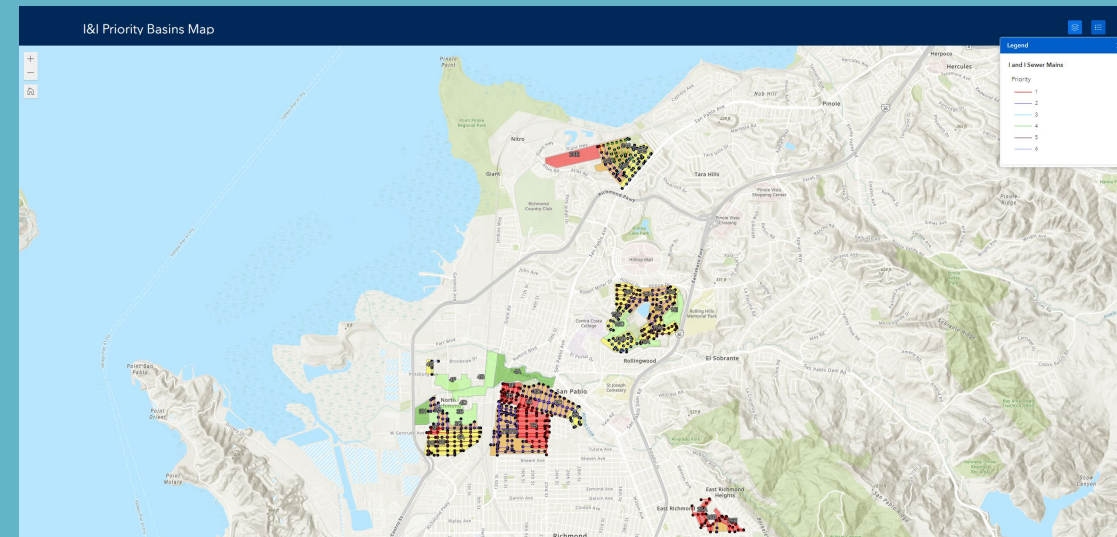
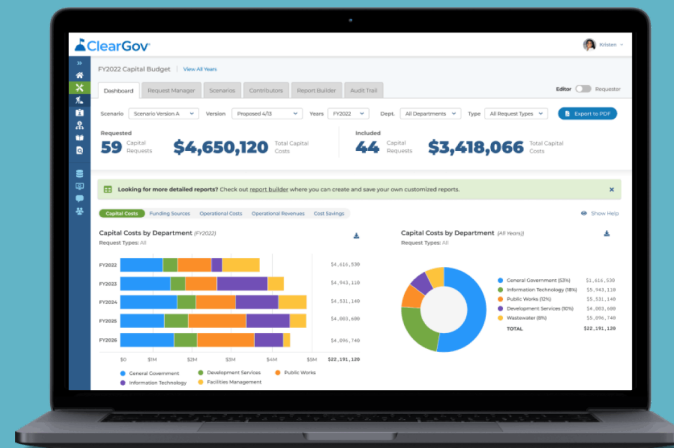
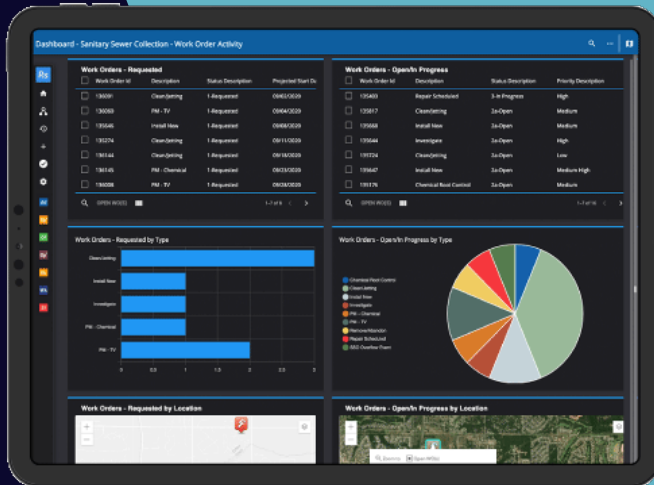
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achieveit
Let's actually do this.™



STRATEGIC GOAL 4: INFORMATION SYSTEMS & DATA MANAGEMENT



https://repository.laserfiche.com

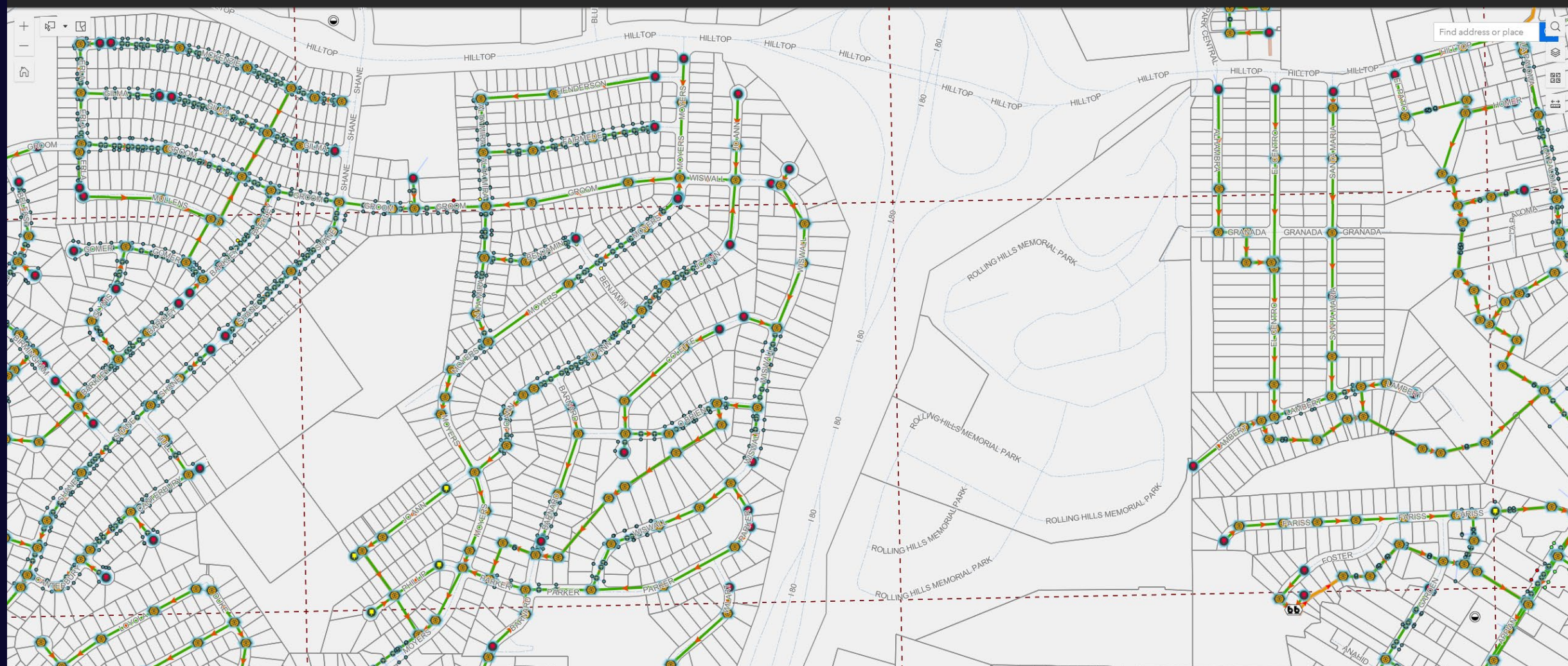
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Laserfiche > Human Resources > 2015 (1 selected)

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<input type="checkbox"/>	Baron, Michelle	1/5/2015 9:30 AM	6/8/2015 6:21 PM
<input checked="" type="checkbox"/>	Castrapel, Ben	6/4/2012 7:15 AM	6/8/2015 6:28 PM
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<input type="checkbox"/>	Xiang, William	5/21/2012 8:30 AM	6/8/2015 6:22 PM

★ Starred
🕒 Recently Opened Documents
📁 Records Management
♻️ Recycle Bin

Castrapel, Ben ☆
Metadata Fields Thumbnails More
Life Cycle Edit properties
6/4/2012 Filing date
2/23/2015 Employment Ended
6/8/2015 Cutoff Eligible for cutoff 1/1/2015
1/1/2020 Eligible for destruction
Details
Location Current file area
Status Cutoff
Path Laserfiche\Human Resources\2015\ Castrapel, Ben
Permanent No
Cutoff Instruction
Name End of Employment
Type Time-Event
Cycle CY (Calendar Yearly)



Strategic Goal 4: Information Systems & Data Management

Objective 1: Develop an IT Master Plan

Milestones Completed Through June of 2023:

- ☒ Completed needs assessment for a CMMS
- ☒ Improved and expanded access of maintenance database
- ☒ Organized and formed an IT Committee
- ☒ Implemented Lab Lynx – LIMS
- ☒ Completed GIS Masterplan

Strategic Goal 4: Information Systems & Data Management

Objective 2: Develop and implement a records management program

Milestones Completed Through June of 2023:

- ☒ Completed a Needs Assessment for a CMMS
- ☒ Obtained Access Portal into the Hanson database for plant staff to start a review
- ☒ Implemented an electronic Document Management System (DMS)
- ☒ Turnkey integrated iCompass with Laserfiche

Strategic Goal 4: Information Systems & Data Management

Objective 3: Implement project management system software

Milestones Completed Through June of 2023:

- ☒ Explored vendor options for capital improvement project management system software
- ☒ Procured FOG/Pre-Treatment Program Management software
- ☒ Complete implementation of E-Builder

Strategic Goal 4: Information Systems & Data Management

Objective 4: Complete implementation of work collaboration software

Milestones Completed Through June of 2023:

- ☒ **Migrated from on premise email exchange to cloud based Microsoft 365 including use of Teams**
- ☒ **Provided group training on Monday.com**
- ☒ **One-on-one coaching sessions – Monday.com**

Strategic Goal 4: Information Systems & Data Management

Objective 5: Evaluate IT hardware to support organizational needs

Milestones Completed Through June of 2023:

- ☒ Created specifications for standardizing hardware by employee classification
- ☒ Evaluated current phone system and replaced with a cloud-based Voice over IP phone
- ☒ Implemented additional network security protocols
- ☒ Replaced outdated and unsupported SCADA servers
- ☒ Increased internet bandwidth between Hilltop and Plant
- ☒ Replaced outdated radio communications system between West County Agency partners
- ☒ Expanded network bandwidth at Hilltop
- ☒ Replaced Hilltop server hardware
- ☒ Upgraded to Microsoft 365 Business Premium
- ☒ Implemented Mobile Device Management
- ☒ Provided field staff mobile access to critical systems and information (GIS)

Strategic Goal 4: Information Systems & Data Management

Objective 6: Implement a paper-free workplace

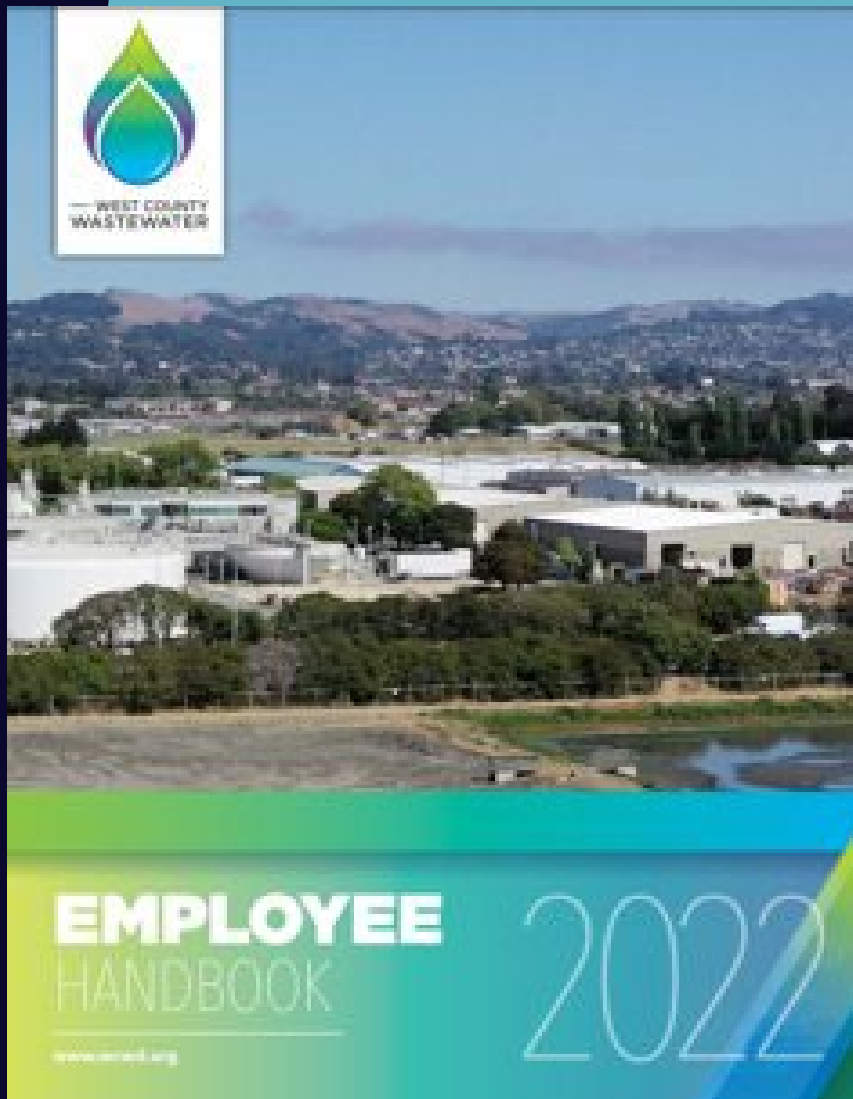
Milestones Completed Through June of 2023:



Reviewed paper-based processes

STRATEGIC GOAL 5: OPERATIONAL OPTIMIZATION





 **West County Wastewater District**
Published by Kate Gibbs · September 7 at 12:51 PM · 🌐

What better way to celebrate [#WaterWednesday](#) 💧 than with the announcement of another great internship opportunity at WCW! 📝✍️

We've, once again, teamed up with our Clean & Green Project partners, [ENGIE North America](#), and are offering a student internship in our Environmental Services Division. 🌍

Thanks for sharing, liking, and spreading the word!



WE'RE HIRING

WEST COUNTY WASTEWATER


**JOIN THE ENVIRONMENTAL
PROGRAMS DIVISION**

ARE YOU A COLLEGE STUDENT MAJORING IN A
STEM FIELD? ARE YOU LOOKING FOR A PAID
INTERNSHIP?

APPLY TODAY: [BIT.LY/WCW2022ENGIE](https://bit.ly/WCW2022ENGIE)




EQUITY VS. EQUALITY



WHAT'S THE DIFFERENCE?


EQUALITY



EQUALITY = SAMENESS
GIVING EVERYONE THE SAME THING
only works if everyone starts from the same place

VS.

EQUITY




EQUITY = FAIRNESS
ACCESS TO SAME OPPORTUNITIES
We must ensure equity before we can enjoy equality

EQUALITY (noun): the quality of being fair and impartial.


EQUALITY (noun): the state of being equal, especially in status, rights, and opportunities.

"Equality is the measure of the action we take. Equity is when all parties experience the same outcomes." (Madison, 2021)







DIVERSITY
of people,
perspectives

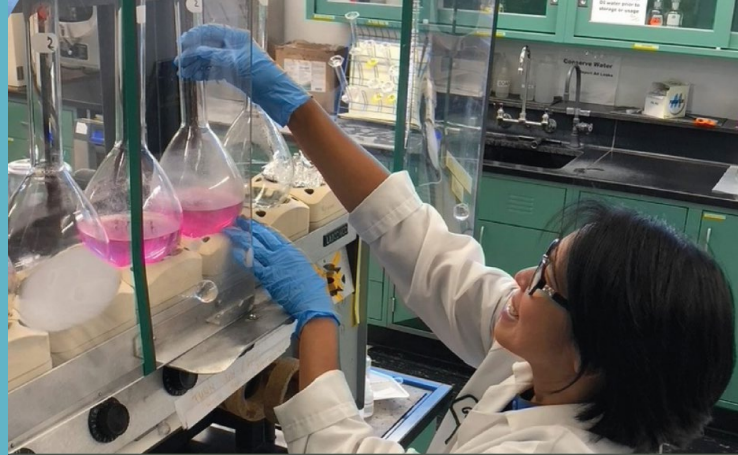


EQUITY
in policy, practice
& position



INCLUSION
via power, voice &
organizational culture



LAB INTERNSHIP

APPLY NOW

bit.ly/LABINTERN2022



West County Wastewater @WestCountyWD · 7s

Come and meet us TOMORROW Saturday, June 25, from 10 - 2 at the Hilltop Community Church Career Fair! 3118 Shane Drive. We'll be there with one of our WCW trucks to talk to you about careers in [#Wastewater](#), [#PublicWorks](#), and the [#environment](#)!



WCW is Hiring!

(C'mon, get in!)

www.wc wd.org/careers/

Strategic Goal 5: Operational Optimization

Objective 1: Expand and streamline current recruiting efforts

Milestones Completed Through June of 2023:

- ☒ Reviewed current recruiting tools
- ☒ Implemented an online assessment program
- ☒ Expanded recruitment outreach
- ☒ Formalized “fit” interview panel and process
- ☒ Formalized recruitment brochure template
- ☒ Recruited two Environmental Compliance Inspectors/Re-Classify the current inspector to a Senior position

Strategic Goal 5: Operational Optimization

Objective 2: Enhance on-boarding experience

Milestones Completed Through June of 2023:

- ☒ Formalized remote worker on-boarding process
- ☒ Completed employee handbook
- ☒ Implemented online on-boarding process
- ☒ Reviewed and refined on-boarding check list
- ☒ On-boarding work-flow process improvement
- ☒ Employee orientation (pre-boarding/first day)

Strategic Goal 5: Operational Optimization

Objective 3: Build on the employee experience

Milestones Completed Through June of 2023:

- ☒ Explored options for a new evaluation process
- ☒ Created a program on Equity, Belonging, and Respect
- ☒ Reviewed performance evaluation software

Strategic Goal 5: Operational Optimization

Objective 4: Support employees by providing career enhancement opportunities

Milestones Completed Through June of 2023:



Formalized the education reimbursement program

Strategic Goal 5: Operational Optimization

Objective 5: Optimize how and where staff works

Milestones Completed Through June of 2023:

- ☒ Completed space planning effort
- ☒ Remote working options

Strategic Goal 5: Operational Optimization

Objective 6: Complete the implementation of a wellness program

Milestones Completed Through June of 2023:



Completed the employee wellness survey



Developed employee wellness initiatives



STRATEGIC GOAL 6: COMMUNITY IMAGE



WEST COUNTY
WASTEWATER



The Drop

Weekly Communication from West County Wastewater

Happy Friday, everyone!

We've had a sunny week here at WCW with a lot of activity!

This past Thursday, we had our first Brown Bag lunchtime event. A big thanks to Operations Manager Izaiah Kruenigel for sharing tools he picked up from recent training with the Water & Wastewater Leadership Center.

We hope to continue sharing with more Brown Bag lunchtime events. It was great to see all 24 staff who attended. Thanks!

To get a hold of the PowerPoint Izaiah used for his presentation, you can check it out [HERE](#).

Training seems to be a theme this week! WCW is always encouraging staff to keep learning and challenging themselves! We have some training opportunities to share with you and a true story of two Maintenance Technicians who recently earned new certifications.

We have such an innovative, forward-thinking group of people working at WCW- and we're so proud of you and appreciate your hard work, creative thinking, and willingness to share your knowledge with us.

*Thanks to Plant Operator Jennifer Garabedian for letting us shoot a picture of her pink hard hat. Awesome PINK!

Training Opportunities


News from California Sanitation Risk Management Authority (CSRMA)...yep, it's a thing!

CSRMA has three upcoming training opportunities available to you. Check them out, mark your calendar, and sign up...they're free! #wecareforall

All trainees must log in to register and join webinars.

It's pretty easy- here's how you do it:

1. Go to [TrainingLink](https://www.dsf-traininglink.com/) to set up your login (or cut/paste this: <https://www.dsf-traininglink.com/>)
2. Login using your email and password.



West County Wastewater

207 followers
2w ·

It's happening THIS SATURDAY! Come out and join WCW at the Hilltop Community Church Career Fair on Saturday, May 20, from 10:00 a.m. to 2:00 p.m. We'll be outside with our cool truck and popular Recycling Cornhole Game!

We heard our pals from Contra Costa Water District, and Baywork will be there, too! Come see about the amazing careers available in the Water and Wastewater industry!

See you Saturday! #workinwater #wastewatertreatment #community #careerfair

New Career, Better Job, Higher Pay with Benefits

GET HIRED IN RICHMOND!

CAREER FAIR

May 20, 2023 | 10am-2pm
Hilltop Community Church
3118 Shane Dr., Richmond, CA 94806

NEW CAREER OPPORTUNITIES WITH TRAINING & BENEFITS IMMEDIATELY AVAILABLE

Meet face to face with some of the largest and best employers in the East Bay. They will train you, employ you, and provide great pay and benefit packages. If you have steady transportation, this Career Fair is for you!

- Industrial/Building Trades (i.e. Unions with great pay & benefits)
- Contra Costa County and other Government Organizations



Home My Network Post Notifications Jobs



West County Wastewater District

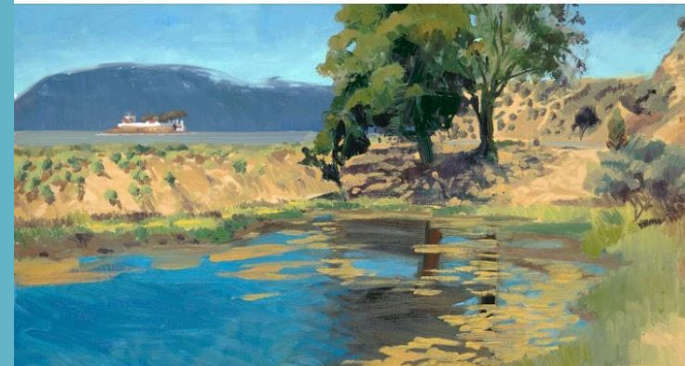
Published by Kate Gibbs · April 12 at 3:54 PM ·

It's Earth Month! We're so excited to share this upcoming Earth Day event with you!

Our friends at [Wholly H2O](#), a non-profit organization focused on preserving and educating people about local watersheds in the East Bay, is hosting an Earth Day Celebration with food, dance, and fun! Join them and other community sponsors at Point Molate Beach park on Saturday, April 23 from 11:00 a.m. to 3:00 p.m.

Come on out and enjoy the Earth in the sunshine and among our wonderful community! Can't wait! Mark your calendars

#EarthDay2022 #planetearth #environment #community #funinthesun



SAT, APR 23 AT 11 AM
Earth Day at Point Molate Beach Park
Richmond
Party · 154 people

Interested

THE LATERAL

CONNECTING US WITH YOU



Wastewater women pave the way for progress

At West County Wastewater, inclusiveness and diversity drive our daily operations. We know diversity is vital to an innovative and resilient workplace and community. WCW embraces the ideas that each employee brings to the table and recognizes that diversity brings innovation. That's why we are dedicated to advocating for empowerment and equality, including growing the number of women working in the water and wastewater world.



Over the past few years, we have increased our own workforce of women significantly, with many filling leadership roles and plant operator positions. At WCW, we believe in extending opportunities to those who may face challenges and obstacles in success. By normalizing women in the wastewater industry, paving the way forward, advocating for inclusion and providing a family-friendly work environment, we open doors for those who may not otherwise pursue a wastewater career.

Supporting women in wastewater doesn't just mean hiring women. WCW also encourages young girls in STEM studies, supports local education and training programs, and is redefining its hiring practices to provide opportunities for more people. Read profiles of WCW Women in Wastewater and learn more about careers at wcwd.org/women-in-wastewater.



West County Wastewater @WestCountyWD · Jul 18
Hey, that's us! 🙌🙌🙌🙌🙌 thanks @PublicCEO for spreading the word!

PublicCEO @PublicCEO · Jul 18
The @WestCountyWD is looking for a new records program coordinator. Learn more about this job and how to apply at #PublicCEO bit.ly/3uVF4Q5

West County Wastewater District ✓
Outreach Tara Bravo • 3 days ago

Who doesn't love a makeover?! Check out our gardening project at the front entrance of the Plant! We are feeling fancy and looking great!! Happy first day of SUMMER!! #stayhydrated
💖💧 #makeover

Posted to **Subscribers of West County Wastewater District**

👍 4 · 891 Impressions ❤️ Like 💬 1 Comment ➦ Share



 **West County Wastewater District** is at **West County Wastewater District**.
Published by Kate Gibbs · July 18 at 1:40 PM · Richmond · 🌐

Hitting the ground running on a sunny, summer Monday! ☀️

You may be used to seeing our trucks and crews throughout the district taking care of the infrastructure but we also have hard-working staff who hold it down 💯 inside our Hilltop offices!


❤️💧




11:12 5G 🔋

← **West County Wastew...** 401 Tweets 🔍 ⋮


Tweets Replies Media Likes

 **West County Wastewater** @WestCo... · 20h ...
Happening in Pinole on Sunday, June 11! ❤️ = ❤️

 **Mayor Devin T. Murphy** 🏳️‍🌈 🗳️ 📦 · 1d

The City of Pinole presents


PINOLE PRIDE



SUNDAY
JUNE 11 | 12PM-3PM
FERNANDEZ PARK


Celebrating Pinole's 120th birthday,
Juneteenth, and Pride Month

- FREE EVENT
- Musical performances
- Food vendors
- Children's activities



Visit our website www.ci.pinole.ca.us
email recreation@ci.pinole.ca.us or call 510-724-8062.

💬 ↺️ 2 ❤️ 6 📊 250 ⬆️

 **West County Wastewater** @WestCo...
WCW is proud to celebrate #PrideMonth! 🌈
Send us your requests to add to our "All"

🏠 🔍 🗣️ 🔔 19 ✉️

Strategic Goal 6: Community Image

Objective 1: Complete and implement Communications Master Plan

Milestones Completed Through June of 2023:

- ☒ **Ensured Communications Master Plan dovetails with Strategic Plan**
- ☒ **Prioritized outreach efforts**
- ☒ **Finalized communications plan**

Strategic Goal 6: Community Image

Objective 2: Develop and implement effective external communication tools

Milestones Completed Through June of 2023:

- ☒ Completed new logo rollout and implementation
- ☒ Redesigned website
- ☒ Implemented iCompass Agenda Management
- ☒ Created templates for Staff Report
- ☒ Published “The Lateral” quarterly

Strategic Goal 6: Community Image

Objective 3: Develop and implement effective internal communication tools

Milestones Completed Through June of 2023:

- ☒ Created weekly employee newsletter
- ☒ Created standard recurring report on Strategic Plan Milestones
- ☒ Created annual Strategic Plan update
- ☒ Created standard reporting for financial reporting
- ☒ Created standard reporting on capital reports
- ☒ Identified key performance indicators (KPI)
- ☒ Created a dashboard for KPI
- ☒ Completed monthly dashboard for Board updates
- ☒ WW101 Video and Corresponding Presentation Deck
- ☒ Created an audio version of “The Drop” (an internal podcast)

NEXT STEPS

- **Executive Leadership Team to collaborate with departments/divisions to create milestones for FY 2024**
- **Explore additional software platforms to enhance our reporting and tracking capabilities**
- **Work with the Board of Directors to review and update the Five-Year Strategic Plan in the Spring of 2024**



WEST COUNTY
WASTEWATER



QUESTIONS?

A decorative graphic on the left side of the slide, consisting of three parallel, wavy vertical lines. The outermost line is white, the middle line is a light blue color, and the innermost line is white. These lines create a stylized, organic shape that resembles a coastline or a series of waves.

END