

# Santa Fe Irrigation District

## Board of Directors Strategic Plan



June 27, 2005



Approved by Board of Directors  
July 21, 2005

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## Introduction

The Board of Directors developed this Strategic Plan during Spring 2005 with participation by the general manager and legal counsel, in a facilitated process at a planning workshop.

**Planning Process.** The process began with a review of pertinent District documents, followed by individual interviews with each member of the Board of Directors, as well as the general manager and senior staff members. The preparations were followed by two all-day Board planning workshops and a review session held on April 7 and 20, and May 27, 2005. At the workshops, the elements of the Mission Statement, Vision, Objectives and Goals were drafted.

**Completion of the Strategic Plan.** Next steps in the strategic planning process will be for staff to complete work plans that address each of the Board Goals, and set priorities and timelines for action. Staff may also suggest refinements to the Goals or Objectives at that time. Once approved, these will be incorporated into the District's budget. When these steps are complete, the District's entire planning process will be integrated and referenced to the Strategic Plan.

**Future Actions.** This Plan cannot remain static; it must change with the needs of the District in order to provide continuing, meaningful guidance to the Board and the staff. Therefore, it is recommended that the Plan be reviewed in a workshop setting each year, where what has been completed and what remains to do would be determined, and also be updated as necessary with new goals.



## Mission Statement

**The Mission of Santa Fe Irrigation District is to provide its customers with an adequate and reliable supply of quality water that meets customer needs at a reasonable cost, supported by excellent customer service**

## Vision Statement

**Santa Fe Irrigation District will be recognized as a model of excellence in the water industry, based on:**

- A diverse portfolio of water resources that meets applicable water quality standards and customer needs.
- Innovative approaches to managing operations and meeting customer and community needs.
- Reliable infrastructure, built and maintained to high standards.
- Outstanding and continually improving customer service.
- Efficient and flexible administration capable of responding to opportunities and challenges.
- A superior and stable workforce.



## **Strategic Objectives**

### **Objective 1. Water**

Assure an adequate, diverse and reliable supply of quality water that meets all customers' needs.

### **Objective 2. Assets**

Plan, provide and maintain district facilities and other physical assets to achieve reliable and efficient district operations over the long term.

### **Objective 3. Finance**

Maintain a sound financial condition, establish reasonable customer rates, and achieve a prudent balance among district revenues, expenses, and reserves.

### **Objective 4. Relationships**

Build understanding and support for district activities among customers and involved agencies, and seek opportunities for mutually beneficial cooperative efforts.

### **Objective 5. Administration and Management**

Institute policies, administration, management that carry out district operations in an effective and efficient manner, utilizing best business practices.



## Goals

**Objective 1.0 Water:** Assure an adequate, diverse and reliable supply of quality water that meets all customers' needs.

### Goals:

- 1.1 Conduct up-to-date, long-term, integrated water management planning.
- 1.2 Expand and diversify the district's water supply portfolio so that all customer needs are met.
- 1.3 Maximize the use of local water resources.
- 1.4 Meet all applicable regulatory standards.
- 1-5 Promote efficient water use.

**Objective 2.0 Assets:** Plan, provide and maintain district facilities and other physical assets to achieve reliable and efficient district operations over the long term.

### Goals:

- 2.1 Develop a district needs assessment for the headquarters, operations yard, treatment plant, and other facilities.
- 2.2 Prepare and implement a long-range property plan.
- 2.3 Develop an integrated asset management plan for upgrade and replacement of the District's capital facilities, taking into account long-term needs
- 2.4 Develop and implement an easement and right-of-way policy.
- 2.5 Implement appropriate technology to efficiently meet the district's operational needs.



**Objective 3.0 Finance:** Maintain a sound financial condition, establish reasonable customer rates, and achieve a prudent balance among district revenues, expenses, and reserves.

**Goals:**

- 3.1 Prepare and maintain an updated multi-year financial master plan.
- 3.2 Establish customer rates adequate to provide quality water services.
- 3.3 Provide regular, understandable and meaningful financial information for Board review.
- 3.4 Periodically review and update the district's reserve and investment policies and situation.
- 3.5 Meet all applicable regulatory and audit requirements.

**Objective 4.0 Relationships:** Build understanding and support for district activities among customers and involved agencies, and seek opportunities for mutually beneficial cooperative efforts.

**Goals:**

- 4.1 Measure customer satisfaction and obtain customer input on district services and rates.
- 4.2 Develop and implement an overall outreach and communications plan for customers and neighbor agencies.
- 4.3 Avoid surprising the public by providing a proactive outreach and education program on recycled water, water rates, water supply, and other important issues.
- 4.4 Identify where opportunities and threats exist related to relationships, and develop effective interactions that help promote positive outcomes.
- 4.5 Continuously monitor and improve customer service.



**Objective 5.0 Administration and Management:** Institute policies, business practices and management that carry out district operations in an effective and efficient manner.

**Goals:**

- 5.1 Implement and continuously improve business practices that support district operations in an effective and efficient manner.
- 5.2 Maintain an effective, efficient and stable workforce, recognizing employees as one of the district's greatest assets.
- 5.3 Make provisions to assure that staff can accomplish the district's objectives and goals in an effective and efficient manner.
- 5.4 Cultivate and maintain ethics education and ethical practices.
- 5.5 Implement appropriate opportunities for outsourcing.
- 5.6 Develop and implement an appropriate risk management program.

