

Alameda County Water District

Approval of Alameda County Water District Strategic Plan 2025-2030

Ed Stevenson, General Manager

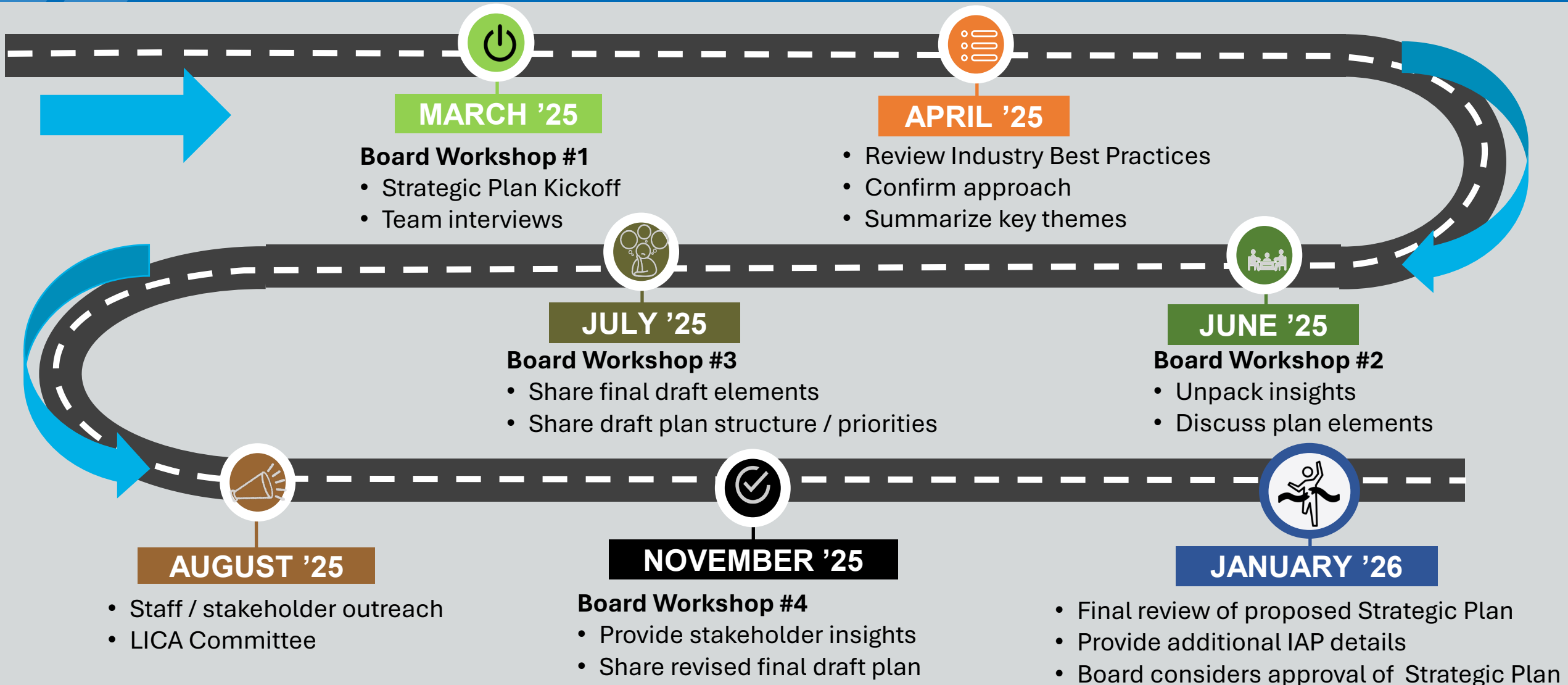
Jackie McCloud, Special Assistant to the General Manager

Ethan Burch, Senior Administrative Analyst

Agenda

- Review Draft Alameda County Water District Strategic Plan 2025-2030
- Overview of Draft Implementation Action Plan (IAP)
 - Located in Appendix A of the Strategic Plan
 - “Living document” that will be adaptively managed
 - Document is always available to the Board
 - *NO BOARD ACTION NEEDED on IAP*
- **Consider Approval of the Alameda County Water District Strategic Plan 2025-2030**

Strategic Plan Journey



Strategic Plan

What it is ...

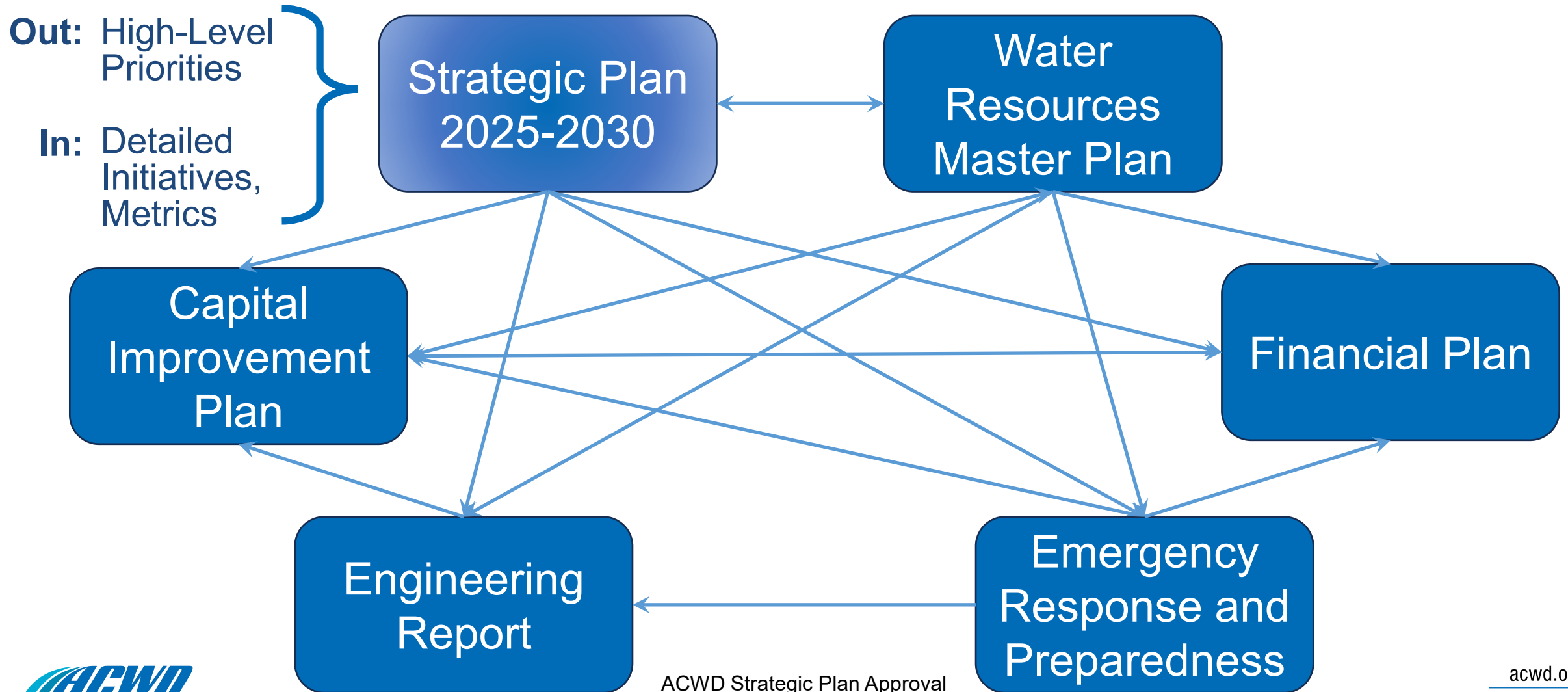
- ✓ High-Level Vision/Blueprint
- ✓ Sets our priorities
- ✓ Basis of initiative and metric tracking
- ✓ Specific / concise / actionable

What it is NOT ...

- ✗ About everything we do
- ✗ An operations plan or “wish list”
- ✗ A plan to be left on the shelf
- ✗ **NOT** the *Water Resources Master Plan (WRMP)*



How the Strategic Plan relates to other District-Wide planning



How the Strategic Plan is used at ACWD

- Links our Mission, Vision, and Values to our everyday work and our priorities
- Communicates our priorities throughout the District
 - Informs other District-wide plans as well as division workplans
- Establishes clear objectives that drive approach to initiatives
- Tool for tracking performance against metrics
- Keeps staff time and effort, and ratepayer funds, on target and **focus limited resources**

Mission, Vision, and Values

Mission Statement

***To provide our customers with
reliable, sustainable,
high-quality water service at a
reasonable price.***

Vision Statement

Quality water, thriving community

Core Values

Service

Resilience

Safety

Collaboration

Trust

Stewardship

Each Core Value defined and reviewed in detail during November 6, 2025, Workshop

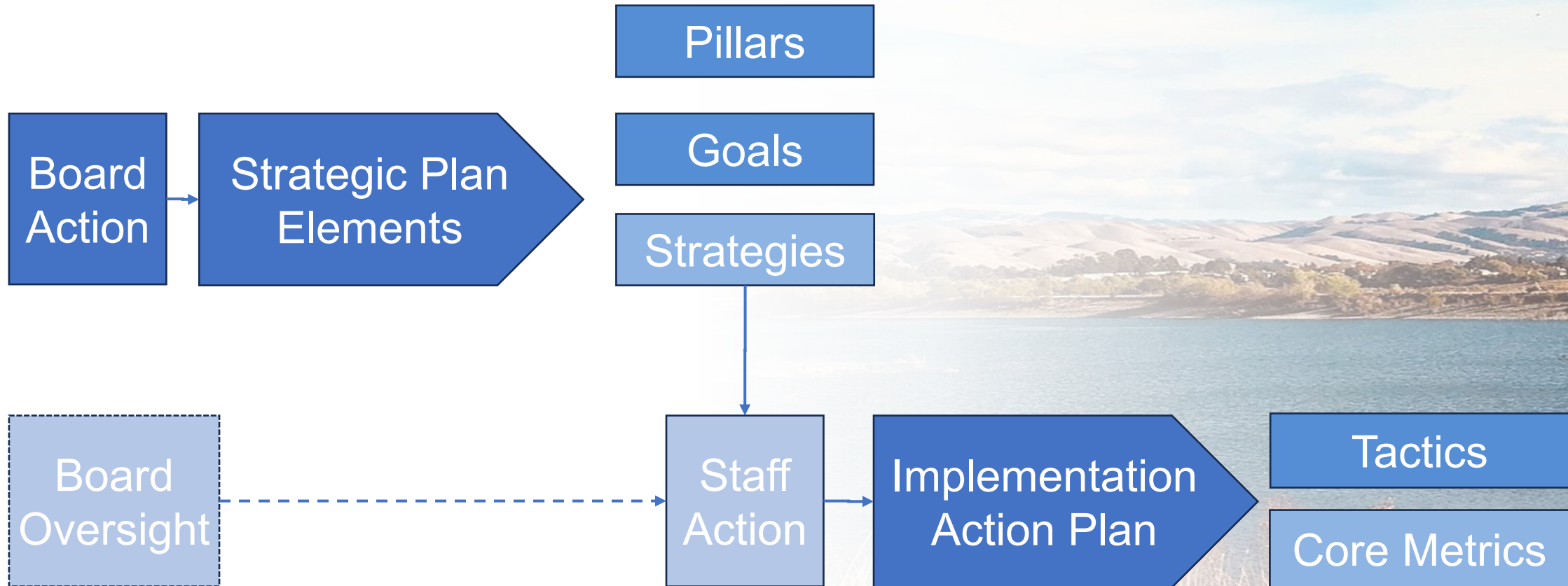
Strategic Plan 2025-2030 Structure

Strategic Plan 2025-2030

Major Plan Elements:

- Plan Structure includes Pillars, Goals, Strategies
 - New Vision, Mission, and Values
- } Board Driven
-
- Appendix A: Implementation Action Plan
 - Tactics and Core Metrics
 - Outcomes and Timelines
- } Staff Driven

Plan Structure



Plan Structure, Example

Examples

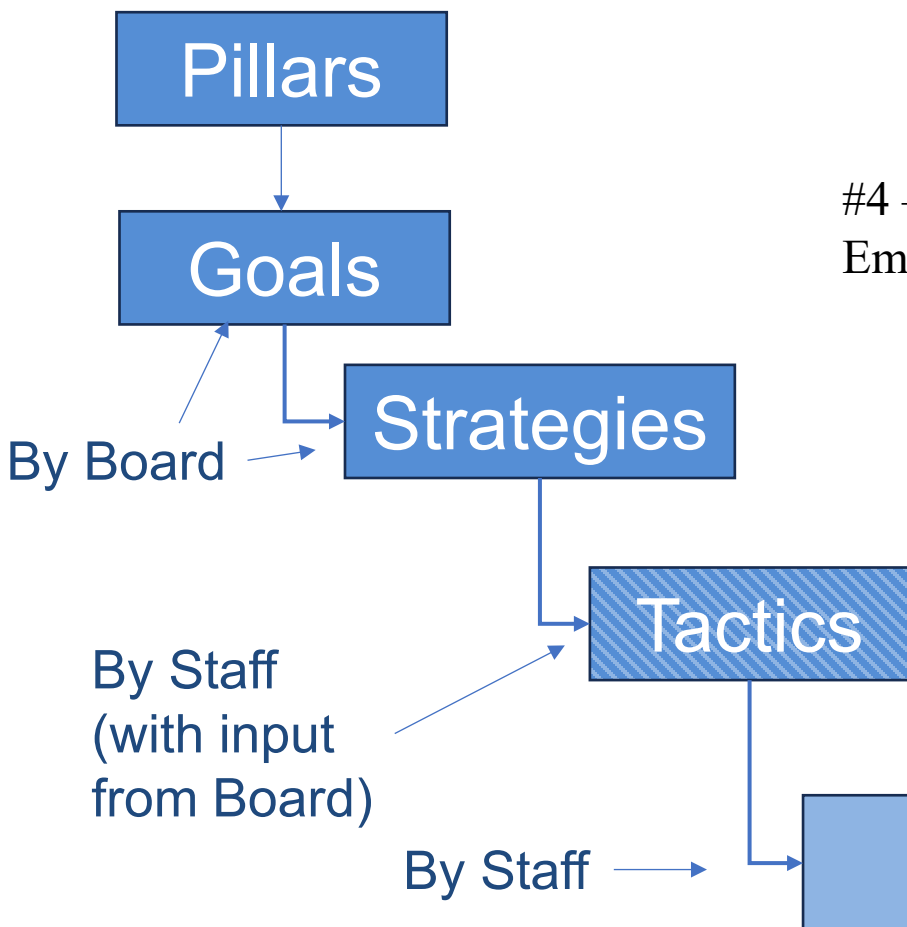
(from existing Strategic Plan and Dashboards)

#4 – Improve Workforce Recruitment, Maintain Retention, and Enhance Employee Engagement

4.2 Maintain Employee Retention by Encouraging and Valuing Employee Work Efforts and Skills

- Maintain a healthy level of employee turnover while encouraging retention for continuity of service
- Review performance evaluation methods and efforts to better communicate the value of an employee's efforts and skills

- ✓ Performance Evaluation Completion Compliance: minimum 75%
- ✓ Recruitment cycle duration: 90% within 5 months



Comparison of 2018 and 2025-2030 Plans

Strategic Area	2018 Plan	Plan 2025–2030
Cost Effectiveness & Value	Focused on infrastructure, water quality, emergency preparedness, and customer efficiency programs.	Expanded to include innovation, asset management, and technology integration.
Water Supply	Emphasized reliability, conservation, and planning for future supplies.	Adds emphasis on resilience, regional partnerships, and implementation of the Water Resources Master Plan.
Finance	Focused on revenue stability, cost reasonableness, and transparency.	Adds affordability, customer access, and enhanced financial reporting standards.
Workforce	Addressed recruitment, retention, and engagement.	Adds succession planning, safety, and organizational culture.
Communication	Focused on outreach and engagement tools.	Expands to include accessibility, underserved communities, and emergency preparedness messaging.
Emergency Preparedness	Addressed under Cost Effectiveness & Value.	Elevated to a standalone pillar with detailed strategies for programmatic, infrastructure, human, and organizational cultural readiness.

Strategic Plan 2025-2030

Pillars, Goals, Strategies

Pillar #1: Cost Effectiveness and Value

Goal: Maintain and improve the cost effectiveness, reliability, and value of District services.

Strategy	
CEV 1	Efficiently manage and maintain our infrastructure to ensure reliability
CEV 2	Continue to meet water quality standards 100% of the time
CEV 3	Prioritize efficient water system management and operations



Pillar #2: Water Supply

Goal: Sustain a reliable, high-quality water supply for our customers

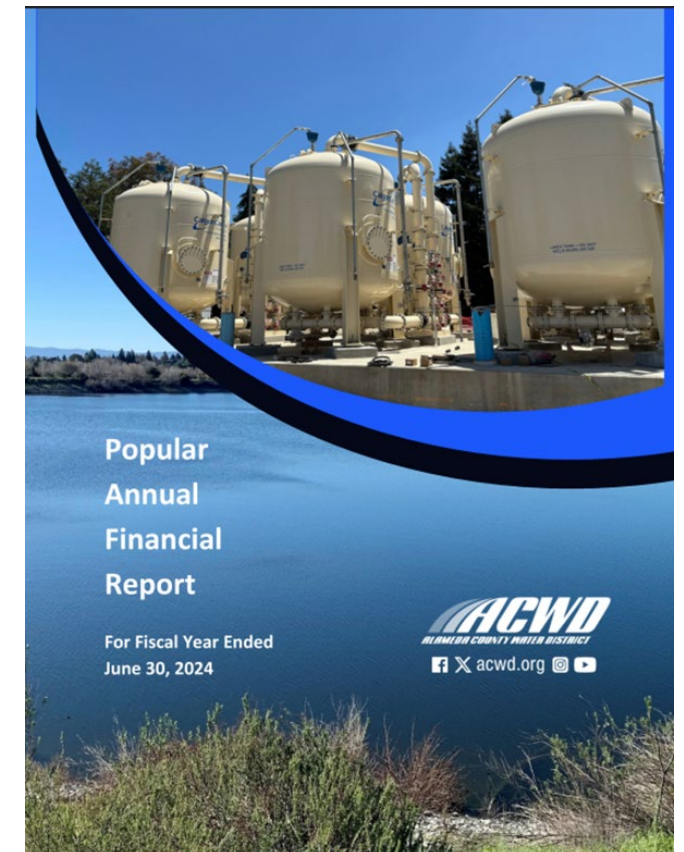
Strategy	
WS 1	Protect, maintain, and enhance the sustainability, reliability, and quality of local, regional, and imported water supplies.
WS 2	Advocate for the value of imported water supplies.
WS 3	Evaluate new and innovative water management concepts to foster resilient water supplies.



Pillar #3: Finance

Goal: Maintain financial stability and promote transparency

Strategy	
F1	Ensure revenue stability
F2	Ensure cost reasonableness and prudently manage customer financial impacts
F3	Prioritize financial transparency
F4	Support customer access and affordability



Pillar #4: Workforce

Goal: Improve workforce health and safety, enhance recruitment, maintain retention, and deepen employee engagement

Strategy	
WF 1	Enhance recruitment strategies to attract a highly qualified, and diverse workforce
WF 2	Maintain employee retention by encouraging, valuing, and developing employee contributions and skills
WF 3	Champion employee safety and wellbeing to drive a thriving and resilient workforce
WF 4	Cultivate an engaged, productive, and innovative workforce
WF 5	Enhance succession planning and knowledge transfer



Pillar #5: Communication

Goal: Promote clear and open communications, outreach, and engagement with customers and communities.

Strategy	
C1	Increase awareness of District services, resources, and value in the community
C2	Continuously work to improve the customer experience and engagement
C3	Foster transparent and consistent communication with diverse communities, customers, and District partners
C4	Sustain a culture of water use efficiency through education, outreach, and engagement
C5	Help customers prepare for water-related emergencies



Pillar #6: Emergency Preparedness and Response

Goal: Ensure organizational readiness to respond to disasters and emergencies that threaten our ability to carry out our mission.

Strategy	
EPR 1	Ensure Programmatic Readiness
EPR 2	Ensure Infrastructure Readiness
EPR 3	Ensure Human Readiness
EPR 4	Ensure Organizational Cultural Readiness



*Spill response training with City of Fremont
Fire and Hazardous Materials, 4/8/25*

Appendix A: Implementation Action Plan

*Not Included in Recommendation for Board
Approval of Strategic Plan*

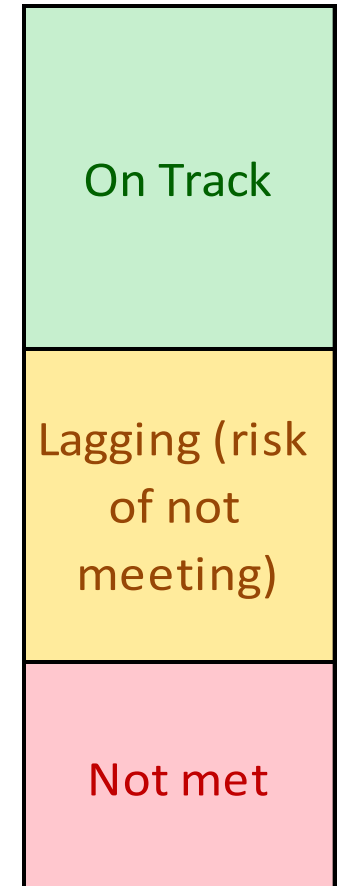
Appendix A: Implementation Action Plan

- Implementation Action Plan (IAP) is the “**how**” staff plans to meet our Board-approved pillars, goals, and strategies.
- Staff-developed, based on Board objectives.
- Developed through internal working group meetings with subject matter experts.
- “**Living**” **document** that will be adaptively managed.
- Includes tactics, outcomes, metrics, owner, and timeline.
- Current draft (in progress) included in Board Packet.
 - Staff is working on completing the baseline IAP by end of Q1 2026.

Appendix A: Implementation Action Plan

- Staff will review internally each quarter
 - Evaluate progress toward objectives and metrics
 - Adjust objectives and metrics as appropriate
 - Delete/change metrics not found to be operationally relevant
 - Tighten objectives/metrics as they are achieved
 - Many objectives and metrics are “stretch goals”
 - Ambitious but achievement would be ideal
 - Color-coded status system for internal tracking. Enables resource adjustments where appropriate
- **Staff is not seeking approval of the IAP.**

Status Tracking



The Implementation Action Plan User's Guide

Implementation Action Plan Outline in Board Packet

- Includes the DRAFT outline with identified Pillars, Goals, Strategies.
- Under each Pillar, Goal, and Strategy: Tactics, Description, Outcomes, Core Metrics, Owner, and a Timeline are included.
- Tactics are under development through Calendar Year 2026 Q1
- FY 2026 will provide a baseline for implementation for identified Tactics and Core Metrics.

Implementation Action Plan Outline Example

Pillar 1: Cost Effectiveness & Value

Goal: Maintain and improve the cost effectiveness, reliability, and value of District services

Strategy CEV 1: Efficiently manage and maintain our infrastructure to ensure reliability.

TACTIC: CEV 1.1. Capital Improvement Program Execution

- **Strategic Initiatives:** Ensure progress in the capital program to meet overall capital infrastructure improvement objectives.
- **Description:** Ensure progress in the capital program to meet overall capital infrastructure improvement objectives.
- **Outcome:** Adequate completion of capital projects
- **Metric:** >85% capital budget spent (as budgeted)
- **Owner:** PE
- **Timeline:** Annual

Implementation Action Plan Outline Example

- **Strategy WF 2: Maintain employee retention by encouraging, valuing, and developing employee contributions and skills**
- TACTICS
- **WF 2.2: Manage labor costs to control upward pressure on water rates**
- Strategic Initiatives: TBD
- Description: Optimize staffing levels to focus on District priorities, and ensure overall compensation is consistent with market comparators.
- Outcome: Efficient and productive workforce, pay scales consistent with market.
- Metric: TBD
- Owner: District-wide
- Timeline: Ongoing

Recommendation

By motion, adopt a resolution approving the Alameda County Water District Strategic Plan 2025-2030

Questions?

Alameda County Water District

Help on Tap Program Review and Future Affordability Roadmap

Ethan Burch
Senior Administrative Analyst

Agenda

- Review of Help on Tap Program
- Proposed Affordability Roadmap
 - Implementing a supplemental Crisis Assistance Program
 - Developing an ACWD Affordability Policy
 - Crisis Assistance Leak Repair Program

Help on Tap Program Review

- Currently 1,758 program participants, on pace for \$710k annual spend
 - 700 recertification letters sent to customers; 273 customers removed due to lack of recertification
- Program remains in line with most generous comparator agency programs
 - Program benefit of 100% of service charge represents a 45% credit for a customer using 16 units
 - Represents 75% reduction in cost for the median program participant using 7 units bimonthly
- Available non-rate revenues continue to exceed program requirements

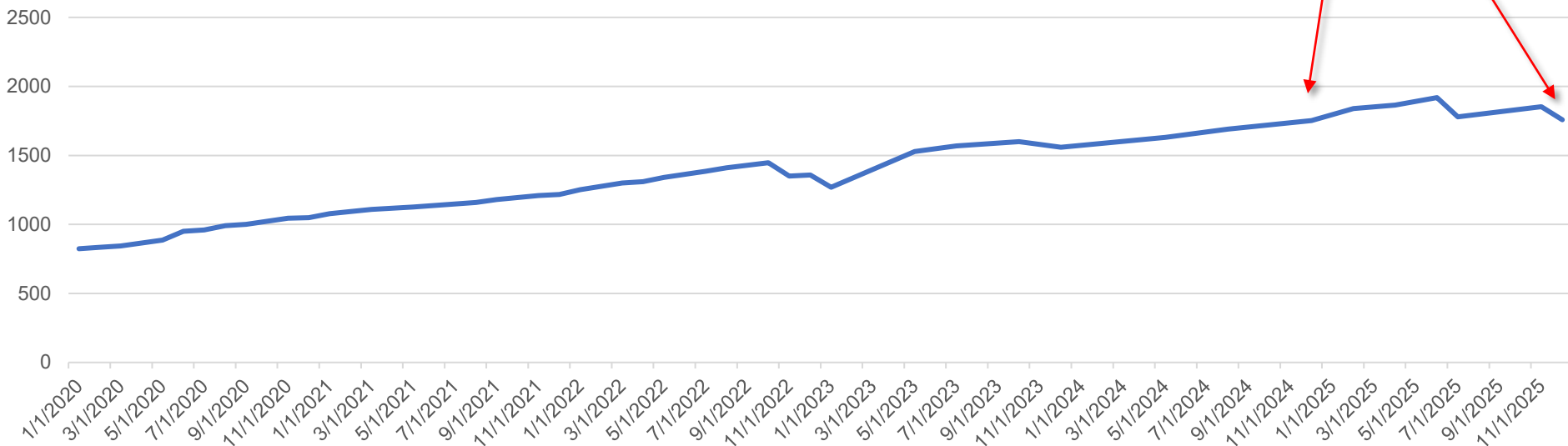
Help on Tap Program Review

- Program participation relatively stable over the last year

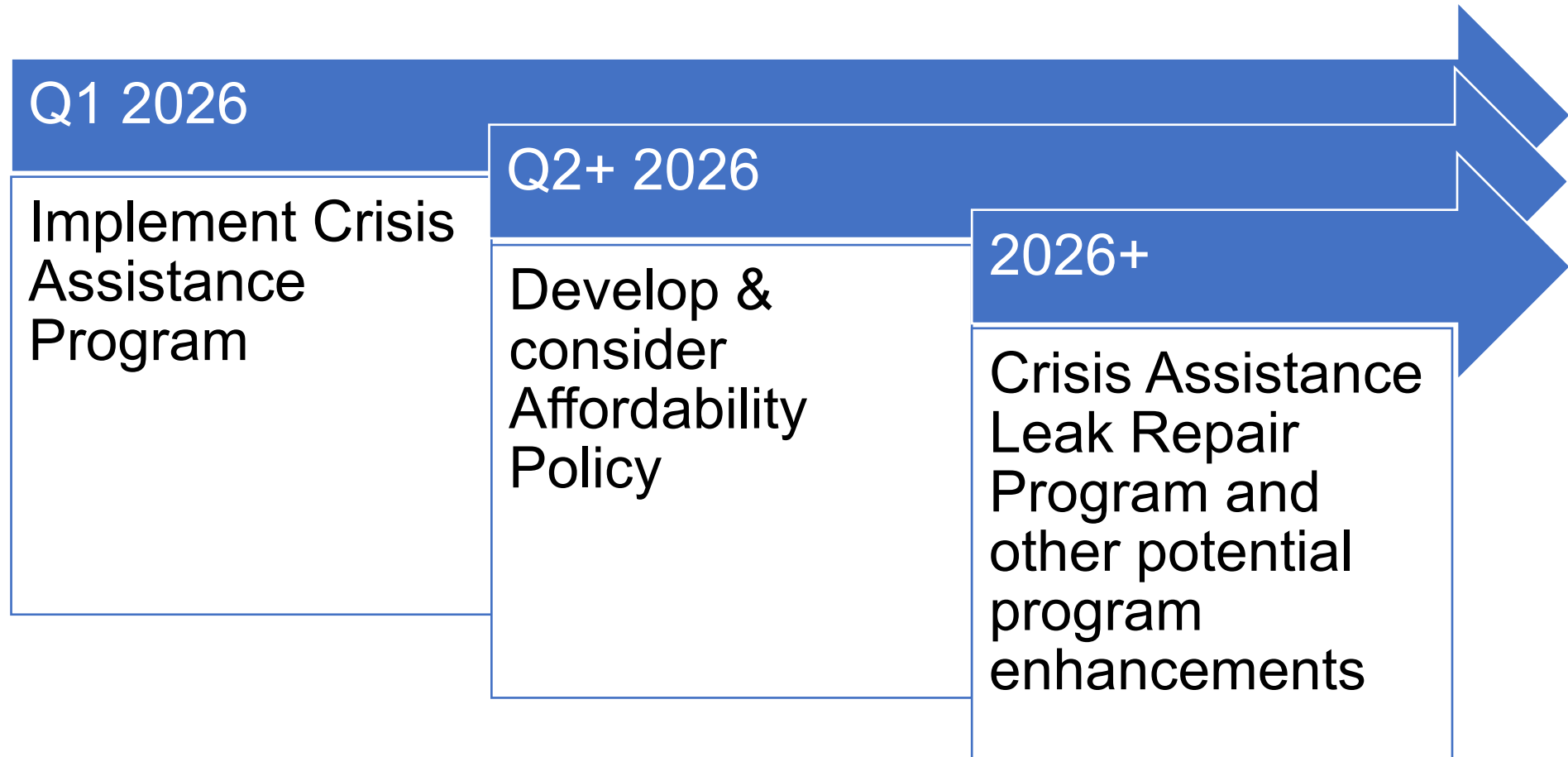
December '24: 1,752

December '25: 1,758

Program Participants - 2020 to Present



Proposed Affordability Roadmap



Proposed Affordability Roadmap

Advancing a Crisis Assistance Program

- With program enrollment leveling off, confidence in the ability to maintain current benefit levels and introduce additional programs has grown
- Available ***non-rate revenues*** (excluding ad valorem tax funding) currently exceed Help on Tap program demands
- Unused ***non-rate revenues*** could be carried forward to fund new programs to support customer affordability

Proposed Affordability Roadmap

Implementing a Crisis Assistance Program

- This proposed program is envisioned as a safety net for customers facing unexpected financial crises
- Benefit
 - Up to \$200 toward a past due water bill balance
 - Up to once every two years
 - First-come/first-served since funding is limited
- Income and eligibility guidelines proposed to match Help on Tap program
 - Approved customers would be automatically enrolled in Help on Tap unless already enrolled (a means of expanding Help on Tap program enrollment)
- Annual spend is expected to be limited with proposed guidelines; most enrolled Help on Tap customers do not carry arrearage balances

Proposed Affordability Roadmap

Implementing a Crisis Assistance Program

- Initial pilot program is proposed for one year, after which revisions to eligibility, benefit level, to be considered
- If program funds are not fully drawn down, remaining funding could be used to fund other program enhancements
- Next Steps: Board adoption for incorporation into Rate & Fee Schedule effective March 1

Proposed Affordability Roadmap

Developing an Affordability Policy

- While ACWD considers affordability impacts in decision making, there is no formal policy that sets affordability standards or definitions
- National standards and guidelines are not always applicable; ACWD's customer base is unique
- Staff plans to return to the Board later this year to begin the process of developing definitions, guidelines, and an Affordability Policy

Proposed Affordability Roadmap

Additional *Potential* Program Enhancement: Crisis Assistance Leak Repair Program

- Some lower income customers struggle with plumbing leak repairs
- Inability to address leaks and plumbing failures results in excessive water waste and escalating bill balances
 - Income limitations make repairs cost-prohibitive
- Staff plans to evaluate options for implementing (and funding with ***non-rate revenue***) a Crisis Assistance Leak Repair Program
- Potential Program alternatives to be presented to the Board in 2026

Questions?