

San Miguel CSD Strategic Plan 2022-2027

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SMCSD Strategic Planning Team

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Message from the President of the Board of Directors

On behalf of the San Miguel Community Services District Board of Directors, it is my honor and privilege to present the Board's Strategic plan for Fiscal years 2022-2027. I want to thank everyone involved in the plan's development. The Strategic planning process has been a collaborative effort between Board Members, District Staff, and the Public, which has produced a useful tool for shaping the future of the San Miguel CSD.

Since November 18, 2021, San Miguel CSD and its Board of Directors have been engaged in a strategic planning process, that have provided us with a map of the next five years. We have learned a lot and have laid out clear directives.

This Plan advances the Board's goals of increasing the focused on six key strategies:

1. Water Resources
2. Wastewater services
3. Fire Services
4. Governance and Administration
5. Finance
6. Community and Strategic Partners

This is a time of constant environmental and regulatory change, at the local, state and federal levels. With that in mind, the strategic plan was written with the intention to regularly revisit and measure successes and to account for emerging opportunities.

As President of the Board, I welcome input from all interested parties to join in working with the Board over the next five years to achieve the goals as put forward in this plan. The Board publishes advance notices of all its Board meetings and encourages participation from the community.

Raynette Gregory

Message from the General Manager

As General Manager, I recognize the need for the District to establish a Strategic Plan that will focus the Board of Directors and Staff in the planning of the operational needs for the district. In this current economic state of society, it has become more prevalent to develop and implement a plan that can and will prepare the district to meet the challenges we will face now and into the future. The district needs to be in a position to respond and act on the challenges instead of reacting with unplanned actions and limited resource. As we develop and achieve benchmarks with the plan the District needs to stay focused on the overall goal.

The San Miguel CSD Directors and Staff have actively developed this Strategic Plan to outline the future operational needs of the District and to achieve the goals for the vision that of the District. The Plan also identifies the actions and tactics required to lay the foundation that will set the course for the district and the future development. This plan creates a roadmap designed to meet the operational, governance and financial needs of the community for the next five years and into the future.

Robert Roberson **General Manager from 2018-2022**

Strategic Plan Development Process

In FY 2021/22, the District retained the services of BHI Management Consulting (BHI) to facilitate and coordinate the updating of the District's five-year Strategic Plan. BHI first gathered input directly from District staff and individual members of the Board of Directors. This was followed by two Board and staff planning workshops. At each meeting the District Mission and 5-year Vision and implementing actions were discussed. The Board supported this process to allow participation in the foundation of the Strategic Plan. The Board developed a new Mission statement a new Vision statement for the District. The Board also identified the six strategic focus areas around which to organize implementation of strategic actions over the next five years.

Following the Board workshops, key staff members, worked with BHI to develop the Strategic Element objective and strategy statements and Strategic goals, actions and tactics in support of each focus to make the Board's Vision reality within the 5-year timeframe. Using this process, this Strategic Plan provides a roadmap for the District and guided by the Board's Vision over the next five years. This Plan was then vetted with the Board a final time prior to approval.

The simple organization of the Plan is outlined first by Mission/Vision. Next come the six, five-year strategic focus areas, then the actions needed to fulfill the vision. Finally, Table 1 provides an overview of the plan with associated dates for actions and goals within the next five years.

Mission –

The San Miguel Community Services District was formed and remains committed to efficiently serving the community with fire protection, water, wastewater, street lighting/landscaping and solid waste services in San Miguel.

Vision –

In next 5 years we plan to:

- move our administration to the new WWTF and successfully opened our new wastewater treatment facility. (Facility, 2022-25)
- remodel the fire station adding an additional apparatus bay, accommodating increased fire staffing, and creating more space for community meetings. This will also allow for a Sheriff's Beat Station. (Facility, 2023-25)
- complete the Fire Department LAFCO redistricting process. (Fire, 2022-24)
- stabilize the water resources portfolio while maintaining fiscally responsible water rates. (Ops/Finance, 2024-25)
- continue with a strong and productive Board culture. (Admin/Governance, 2023-Ongoing)
- have successfully transitioned to a new General Manager. (Admin, 2022-23)
- gain increased influence in county and state regional decisions affecting the District. (Political, 2023-25)
- have deliberately improved staffing and equipment for all facilities. (2023-26)
- implement a proactive public relations program. (2022-ongoing)

STRATEGIC FOCUS AREAS – The board of directors has identified six areas of district operations where time, effort and resources must be focused within the next five years to protect and advance the mission. These are:

1.0 WATER RESOURCES

2.0 WASTEWATER SERVICE

3.0 FIRE SERVICES

4.0 GOVERNANCE AND ADMINISTRATION

5.0 FINANCE MANAGEMENT

6.0 COMMUNITY AND STRATEGIC PARTNER RELATIONS

1.0 WATER RESOURCES

Objective description and general approach: Our objective is to identify and deliver high-quality, reliable and affordable water for District residents.

1.1 PROVIDE WATER SUPPLY STABILIZATION AND DIVERSIFICATION

Objective description and general approach:

- Diversify the Districts water portfolio and reduce groundwater pumping by identifying opportunities to obtain and use recycled and or surface waters.

Objective Goals and Deliverables for the Goal:

- Identify consultant(s) to perform the analysis
- Identify and analyze available sources of recycled and surface waters.
- Identify and analyze potential users for the recycled and surface waters.

Objective estimated completion date:

- Ongoing, initial source identification should start by 2025
- Begin coordination with relevant stakeholders around 2025.

1.2 MAINTAIN A STRONG ROLE ON THE REGIONAL GROUNDWATER SUSTAINABILITY PLANNING

Objective description and general approach:

- Maintain a strong presence within the Paso Basin Cooperative Committee (PBCC) as a Groundwater Sustainability Agency (GSA) by being proactive and passing of forward-thinking policies.

Objective Goals and Deliverables for the Goal:

- Coordinate efforts with other GSAs and the PBCC.
- Consider and establish meaningful policy to protect the groundwater basin.
- Consider and implement projects to improve the groundwater basin.

Objective estimated completion date:

- Ongoing engagement with the PBCC and other GSAs
- Within 1 year engage in planning for projects that benefit the groundwater basin.

1.3 INCREASE OUR WATER STORAGE ON THE EAST SIDE OF THE RIVERObjective description and general approach:

- Design and build a new water storage tank farm and pump station for the San Lawrence Terrace.

Objective Goals and Deliverables for the Goal:

- Identify the scope of the project
- Identify and apply for funding for the project.
- Board approval of scope and funding
- Develop plans and specifications
- Build project.

Objective estimated completion date:

- Design and funding (FY 2022-23)
- Project completion (FY2023-25)

1.4 COMMENCED WITH A PROACTIVE STUDY FOR THE LONG-TERM (20 YEAR) WATER NEEDSObjective description and general approach:

- Our objective is to develop a long-term water needs outlook

Objective Goals and Deliverables for the Goal:

- Work with Board of Directors to develop scope of work
- Identify consultant(s) to perform study and analysis.
- Identify costs and funding mechanisms.

Objective estimated completion date:

- Started by 2025, will be a multiyear process.

2.0 WASTEWATER SERVICE

Objective description and general approach: Our objective in providing wastewater services for District residents is to meet all state regulations for the collection and treatment of wastewater.

2.1 OPEN AND OPERATE THE NEW WASTEWATER TREATMENT FACILITY

Objective description and general approach:

- Under order by the State Regional Water Board, upgrade and expand the Machado Wastewater Treatment Facility.

Objective Goals and Deliverables for the Goal:

- Determine overall wastewater needs and define the scope of the project.
- Secure funding for project.
- Design and construct the project.

Objective estimated completion date:

- Currently under design for this project. Completion of design is estimated to be early 2023.
- Funding approval anticipated in mid-2022 with additional funding applications to be completed in late 2022 to 2023.
- Construction to start in mid-2023 to be completed in early 2024

3.0 FIRE SERVICES

Objective description and general approach: We will continually prepare to meet the growing demands for high-quality Fire and Emergency Services for our District service area.

3.1 SUCCESSFULLY COMPLETE THE REDISTRICTING PROCESS WITH LAFCO AND SAN LUIS OBISPO COUNTY.

Objective description and general approach:

- The Fire Department Staff has worked through the process with LAFCO and the County Board of Supervisors to finalize the Fire Department District boundaries

Objective Goals and associated Dates for the Goal:

- SMCSD Board approval for redistricting.
- Complete formal application process for redistricting to LAFCO.
- Work with LAFCO to receive approval for redistricting.
- Receive County Board of Supervisors approval.

3.2 INSTALL AND USE OUR TEMPORARY HOUSING UNIT/SHERIFF'S BEATSTATION

Objective description and general approach:

- Have temporary housing unit (THU) installed to provide housing for a Duty Officer on-site and enhance response times.

Objective Goals and associated Dates for the Goal:

- Procure temporary housing unit (FY2022)
- Procure SLO County building permits (FY2022/23)
In process (May 2022)
- Proceed with site improvement's (FY2022/23)
Start improvements as SLO County permits are issued
- Install THU (FY2022/23)
- Fully operational (Fall 2022/23)

3.3 FIRE APPARATUS BAY HAS BEEN COMPLETED AND ALL EQUIPMENT SHALL BE MODERN AND WELL-MAINTAINED

Objective Goals and associated Dates for the Goal:

- Proceed with the planning process required for the construction of the proposed apparatus building.
- Complete design around future vehicle/equipment replacement as required per NFPA guidelines. (FY2022-23)
- Identify and acquire funding (FY2022-23)
- Complete new apparatus bay (FY2023-24)

3.4 REMODEL FIRE STATION

Objective Overview:

- Remodel the current station to contain and facilitate;
 - Fire Department Administration
 - Sheriff Beat Station
 - EOC (Emergency Operation Center) and or Meeting Room and or Training Room Public access Meeting Room
 - Fire Staff quarters to accommodate up to 4 staff members

Objective Goals and associated Dates for the Goal:

- Proceed with the planning process required for the construction of the proposed Fire Station remodel (FY2022-23)
- Explore funding sources for design and construction (FY2022-23)
- Complete design documents (FY2023-24)
- Identify and acquire funding (FY2023-24)
- Begin remodel activities (FY2024-25)
- Complete remodel (FY2025-26)

3.5 ENHANCE FIRE DEPARTMENT STAFFING

- Objective description and general approach:

- Maintain and provide duty officer coverage.

- Objective Goals and Deliverables for the Goal:

- Respond to new housing by adjusting fire staffing accordingly.
- Receive additional funding per redistricting (3.1) to enhance staffing, etc.

4.0 GOVERNANCE AND ADMINISTRATION

Objective description and general approach: Our objective is to conduct District business in a professional and productive manner at all levels.

4.1 WE WILL CONTINUE TO WORK ON A LONG-TERM PRODUCTIVE BOARD CULTURE AT SMCSO

- Objective descriptor:
 - The Board of Directors currently enjoys positive relationships with the public at-large, the District staff, other public agencies and each other. As such, it is the intention to maintain this type culture for each successive Board into the future. This requires a certain dedication to the entire San Miguel public to represent them in a civil and productive way.
 - We will develop, maintain, and adhere to a SMCSO Board training schedule
 - The Board of Directors will annually review Board Handbook/By-laws.
- Objective Goals and Deliverables for the Goal:
 - Each Board member will complete scheduled training as required.
 - We will track each Board member to assist in keeping them current with their training.

5.0 FINANCE

Objective description and general approach: We will adhere to the highest financial standards and processes for fiscal solvency and transparency.

5.1 WE WILL DILIGENTLY WORK TO MAINTAIN FISCALLY RESPONSIBLE WATER AND WASTEWATER RATES

• Objective description and general approach:

- Through good forward planning, utilizing best management practices, and optimizing operations we will strive to eliminate unplanned expenses and implement sustainable water and wastewater rates.
- Engage in a 5-year Cost-of-Service Rate Study to begin in July 2022-23 for FY2023-24 implementation
- Analyze the operations of the District and forecast staffing, equipment, and operational costs.
- Regularly update the water and wastewater masterplans with up-to-date priorities and costs.
- Where possible, complete prework for pending projects to position the District for shovel ready grant opportunities. (when financially possible)
- Work with other agencies to identify and secure funding opportunities. (Ongoing)

5.2 WE WILL PERFORM A STUDY TO OUTLINE POTENTIAL SOURCES OF REVENUES

Objective Description: Work with Board to develop the scope of this comprehensive study to identify and analyze existing and potential new mission-related revenue sources for District departments.

Objective Goals and associated Dates for the Goal:

- Determine entity(ies) to perform study.

- Determine funding mechanisms for study.
- Perform study and report to Board on findings.

5.3 WE WILL PERFORM A STAFFING ANALYSIS IN SUPPORT OF THE DISTRICT MISSION

- Perform an analysis of current and future staffing needs to ensure adequate ability to support the Districts Mission.

• Objective Goals and associated Dates for the Goal:

- Assess current staffing and staff duties in all departments.
- Determine future staffing needs for next 5 years for planned growth and expansions.
- Analysis the current and future staffing needs and provide a recommendation based on results.

5.4 WE WILL PERFORM A DISTRICT RATE STUDY THAT ALLOWS FOR MISSION APPROPRIATE COMMUNITY RELATED NEEDS

• Objective Goals and associated Dates for the Goal:

- Conduct a Board workshop to allow for broad discussion, clarity, potential and scope determination of this topic, providing direction to staff.

6.0 COMMUNITY AND STRATEGIC PARTNER RELATIONS

Objective description and general approach: We will be a leading public organization within the San Miguel community. We will facilitate mission related informational workshops, for the overall good of the community.

6.1 WE WILL ENHANCE THE CURRENT HIGH-LEVEL OF COMMUNITY ENGAGEMENT

- Objective Goals and associated Dates for the Goal:
 - Increased District interest and attendance at public meetings

6.2 WE WILL INCREASE OUR LEVEL OF PRESENCE AND INFLUENCE WITH COUNTY RELATED PLANNING AND DECISION MAKING

- Objective Goals and associated Dates for the Goal:
 - Establish and maintain relationships with our County Supervisor(s) and County staffers.

6.3 WE WILL ACHIEVE CERTIFICATION FOR TRANSPARENCY FROM CSDA

- Incoming Board of Directors will receive orientation including training expectations to support District Board culture and conduct goals
- Achieve CSDA District of Distinction Certificate
- Achieve CSDA District Transparency Certificate

6.4 WE WILL PARTICIPATE IN OPPORTUNITIES FOR OUR COMMUNITY TO COLLECTIVELY PLAN AND STRATEGIZE FOR A PROSPEROUS FUTURE

- Objective Overview:
 - We will consider ways to help in a bigger way as the community core.
 - We will allow use of our prime location for development of business partnerships and supporting of conditions and planning for growth and overall economic development, including groups like CSD, Chamber, Advisory Council, and other public groups formed for the overall good of San Miguel.
- Objective Goals and associated dates for the Goal:
 - Work with Board of Directors to develop scope of effort and define costs.

6.5 WE WILL TAKE DELIBERATE STEPS TO COMMUNICATE ABOUT DISTRICT ACHIEVEMENTS

- Objective Goals and associated Dates for the Goal: We will begin making more deliberate and formal press releases to a broad media set deliberately getting to word

out of beneficial actions of the District.

Vision to Action Table Strategic Focus	Strategic Goals	Proposed Objective Dates
1.0 Water Resources	1.1 Water Supply Stabilization and Diversification 1.2 Maintain Strong Role in Groundwater Planning 1.3 Extended Water Storage 1.4 Begun long-term (20 yr.) Water Study	1.1 2025-ongoing 1.2 2023-ongoing 1.3 2023-25 1.4 2025
2.0 Wastewater	2.1 Opened and Operating New Wastewater Treatment Plant	2.1 2022-24
3.0 Fire Service	3.1 Complete Redistricting process with LAFCO/County 3.2 Opened and are Staffing new Fire Temporary Housing Unit 3.3 Fire apparatus Bay/Equipment 3.4 Remodel Fire Station 3.5 Enhance Fire Staffing	3.1 2022-24 3.2 2022-23 3.3 2022-24 3.4 2022-26 3.5 2023-24
4.0 Governance/Administration	4.1 We continue to work on maintaining a strong Board culture <ul style="list-style-type: none"> • Review of Board Handbook/By-laws (2022) • Develop Board training plan (2023) • Track Board training progress (2023-ongoing) 	4.1 2022-ongoing
5.0 Finance	5.1 Fiscally responsible water and wastewater rates <ul style="list-style-type: none"> • Achieve GFOA Budget Transparency certificate (2023/24) 5.2 Revenue Sources Study 5.3 Staffing Analysis 5.4 Rate Study with community consideration	5.1 2022-25 -ongoing 5.2 2023-25 5.3 2022-23 5.4 2023-24
6.0 Community and Partner Relations	6.1 Enhanced Community engagement 6.2 Increased regional engagement, relations and influence 6.3 CSDA Transparency Certification 6.4 Participate in Community Planning 6.5 Proactively communicate the District news	6.1 2022-Ongoing 6.2 2022-Ongoing 6.3 2023/24 6.4 2022-Ongoing 6.5 2022- Ongoing