



**SCV**  
**WATER**

# STRATEGIC PLAN 2024-28

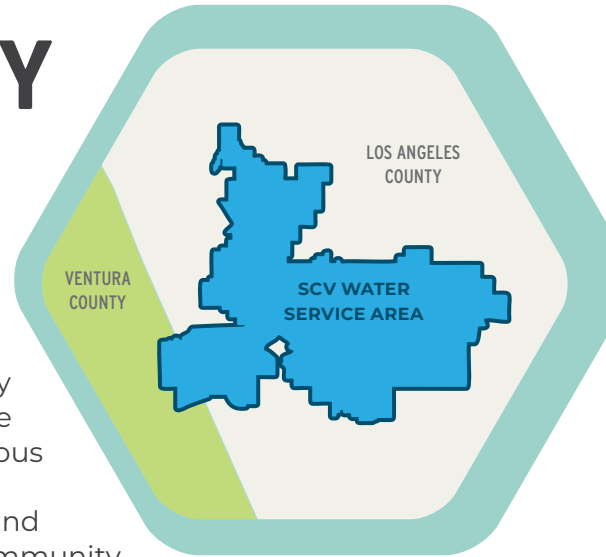


# EXECUTIVE SUMMARY

SCV Water was created January 1, 2018, by an act of the State Legislature (SB 634) through the merger of the four water agencies in the Santa Clarita Valley. SCV Water provides water services to a population of nearly 300,000 in the Santa Clarita Valley through approximately 75,000 water service connections.

Reliable, high quality water service is critical to an economically and environmentally vibrant community. Providing that service is increasingly complex as water utilities must manage numerous challenges. Some of these include finding and maintaining adequate water resources, treating water to ensure its health and safety, coping with the loss of skilled retirees, engaging the community and communicating the value of water, managing the maintenance and replacement of aging infrastructure, and ensuring adequate financial resources to meet these challenges.

The Board and staff of SCV Water have created this 5-Year Strategic Plan to guide the Agency in the coming years. The Strategic Plan is designed to support the vision to provide ***exemplary water management for a high quality of life in the Santa Clarita Valley***. This vision will be accomplished by fulfilling the mission of SCV Water: ***Providing responsible water stewardship to ensure the Santa Clarita Valley has reliable supplies of high-quality water at a reasonable cost.***



## STRATEGIC PLAN GOALS



### **GOAL A Exceptional Customer Service and Stakeholder Engagement**

Advocate and maintain a high level of customer and community satisfaction through policies, programs and contacts.



### **GOAL B Reliable Infrastructure**

Implement, operate and maintain water infrastructure to ensure sustainable water service provision.



### **GOAL C Sustainable Water Supply and Resources**

Implement programs to ensure the service area has reliable supplies of water and supporting resources.



### **GOAL D High Quality Water**

Protect the quality of our water supplies and ensure our drinking water is in compliance with all water quality requirements.



### **GOAL E Financial Resiliency**

Maintain a long-range, transparent, stable and well-planned financial condition, resulting in current and future water users receiving fair and equitable rates and charges.



### **GOAL F A High Performance Team**

Attract and retain quality staff members and grow a culture of continuous improvement that fosters SCV Water's values.



### **GOAL G Environmental Stewardship**

Achieve environmental compliance and strive for sustainable policies, projects, and practices.



### **GOAL H Safe and Secure Workplace**

Maintain the safety of employees and secure the Agency's physical and cyber resources.



# CONTENTS

OUR ORGANIZATION	4
MESSAGE FROM OUR BOARD PRESIDENT	5
MESSAGE FROM THE GENERAL MANAGER	6
THE STRATEGIC PROCESS	8
INTRODUCTION	10
VISION AND VALUES	14
GOALS, STRATEGIES AND OBJECTIVES	16



# ORGANIZATIONAL STRUCTURE

## BOARD OF DIRECTORS

The Agency is governed by a nine-member Board of Directors, elected within three electoral divisions. Officers of the Board include a president and two vice presidents. The Board also appoints a general manager and a treasurer or auditor.



**Gary Martin**  
President



**Maria Gutzeit**  
Vice President



**Kathy Armitage**  
Director



**Beth Braunstein**  
Director



**Edward S. Colley**  
Director



**Piotr Orzechowski**  
Vice President



**William C. Cooper**  
Director



**Dirk S. Marks**  
Director



**Kenneth J. Petersen**  
Director

## EXECUTIVE MANAGEMENT

Our Executive Management team oversees the major strategic direction of the Agency. They work together to ensure that our Agency runs efficiently to serve our customers with reliable, dependable water 24/7.



**Matthew Stone**  
General Manager



**Stephen Cole**  
Assistant General Manager



**Rochelle Patterson**  
Chief Financial and  
Administrative Officer



**Courtney Mael**  
Chief Engineer



**Keith Abercrombie**  
Chief Operating Officer



**Mike Alvord**  
Director of Operations  
and Maintenance



**Ali Elhassan**  
Director of  
Water Resources



**Cris Pérez**  
Director of  
Technology Services



**Kevin Strauss**  
Communications Manager

# MESSAGE FROM OUR BOARD PRESIDENT

On behalf of the Board of Directors of the Santa Clarita Valley Water Agency (SCV Water), welcome to our 2024-2028 Strategic Plan. SCV Water is the result of a collaborative response to the exhaustive “Economic, Efficiencies and Enhanced Water Management study” that identified the potential benefits of a new water agency in the Santa Clarita Valley. It was clear that a unified agency would be more effective in finances, governance, operational and infrastructure assessment, organizational analysis and regional water management. It was also clear we could streamline use of resources and increase efficiencies to better serve customers. This Strategic Plan is the blueprint to continue to deliver on the promises of SB 634, including:

- Providing a more effective, locally representative and regionally integrated voice for water governance.
- Improving on current customer service models and achieving efficiency through economy of scale.
- Creating a financial structure that accounts for existing debts, liabilities and assets and provides for a fully transparent and accountable system.
- Improving operations and infrastructure management by fully integrating distribution networks and resources.
- Providing a single forum to debate and set policy to achieve the most effective way to develop and manage water resources.

The targets for projected savings from efficiencies were met but there is much more to do. The Board has set 8 overarching goals for the coming 5 years related to providing exceptional customer service and stakeholder engagement, providing reliable and sustainable water supplies and service, ensuring high quality drinking water, responsibly managing the financial resources the community has entrusted to us and maintaining a high-performance team to accomplish the above. The Board added two new goals, environmental stewardship and a safe and secure workplace, elevating the emphasis on these important areas in the next 5-year strategic planning period. We look forward to meeting the challenges of water service delivery to the Santa Clarita Valley and remain grateful for the continued support of our community and the dedication of the staff who delivered on these promises.



**Gary Martin**  
President



MAINLINE REPAIRS IN NEWHALL

MESSAGE FROM

# THE GENERAL MANAGER

**IN OUR FIRST 5-YEAR STRATEGIC PLAN FOR THE NEW SCV WATER, THE BOARD OF DIRECTORS IDENTIFIED KEY ISSUES REQUIRING THE AGENCY'S ATTENTION:**

- Developing a common information technology strategy and platform that provides a uniform view across the organization.
- Developing standardized operating procedures for a single organization.
- Managing the coming retirement wave in our workforce through hiring and training new generations and focusing on succession plans.
- Ensuring water supply diversity and resiliency through innovative efforts, a visionary groundwater sustainability plan, and continuing to support the Delta Conveyance Project.
- Ensuring our internal and external communications are transparent and informative.
- Maintaining, replacing and constructing new water infrastructure
- Developing a long-range financial plan to ensure the required investments are paid for in a fair and equitable manner.
- Revisiting the emergency preparedness program for the new Agency to ensure we have plans and resources in place to respond to emergencies.

To this end, and in the face of the COVID-19 pandemic, supply chain challenges, inflation, unprecedented drought conditions, and significant new regulatory mandates (including water quality and electric fleet requirements), the staff made important progress on the Board's strategic goals.

The coming 5 years will bring new challenges, including the need to continue streamlining the Agency systems and processes, planning for a changing climate, managing workforce retirements and succession planning, ensuring continued provision of high-quality water, improving the resiliency of our water supplies and managing the collective rate impacts of these challenges on our customers. Based upon our responses to the challenges of the first 5 years of SCV Water, I am confident we are up to the task and am proud to have the opportunity to manage this organization to meet these challenges.



**Matthew Stone**  
General Manager



## PROGRESS CONTINUES FROM THE 2019 BOARD'S STRATEGIC PLAN GOALS

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- Operated and maintained the infrastructure to deliver essential water service to the community
- Developed plan and constructed facilities to address new PFAS standards
- Complied with all regulatory requirements
- Designed and began construction on significant recycled water infrastructure, the Earl Schmidt Sludge Collection System Project, and the Magic Mountain Pipeline Phase 6B Project
- Quickly funded and constructed facilities to treat our community's water supply for PFAS
- Pursued cost recovery litigation at the contaminated Whittaker-Bermite site
- Standardized the customer service procedures across SCV Water
- Implemented the outreach plan
- Standardize the water conservation program portfolio across SCV Water
- Developed an Emergency Response Plan
- Completed the 2020 Urban Water Management Plan (UWMP)
- Completed and Implemented the Water Shortage Contingency Plan and Water Conservation and Water Supply Shortage Ordinance
- Implemented the dry-year recovery program
- Advanced key measures of the Water Resources Resiliency Plan
- Achieved 24% reductions in water consumption in response to the 20% Reduction in Gallons Per Capita Day by 2020 Mandate (sbx7-7)
- Executed a Castaic Lake release agreement with United Water Conservation District
- Executed an exchange agreement with Irvine Ranch Water District to address the drought
- Formed a Groundwater Sustainability Agency and completed a Groundwater Sustainability Plan
- Completed the update of the Salt and Nutrient Management Plan
- Completed buyout of solar power contracts
- Completed the Sustainability and Climate Action Plan
- Developed and implemented process for grant procurement resulting in over \$20 million in grant awards
- Evaluated environmental compliance tracking software
- Purchased the Agency's 4.5 MW Photovoltaic System (Solar Arrays at Rio Vista Water Treatment Plant)
- Conducted an Agency wide feasibility analysis for battery storage projects
- Launched a Battery Storage Project at the Rio Vista Water Treatment Plant
- Updated cost of service financial models
- Developed a multi-year rate plan to establish appropriate funding and reserves
- Standardized warehouse inventory practices and centralized purchasing
- Reduced the number of customer service field offices, increased offsite payment locations and added Pay-Near-Me options
- Completed an organizational design study that results in updated job requirements, job classifications, clear career paths, and appropriate pay levels
- Standardized telecommunication, network equipment and network access
- Implemented several emergency policies in response to urgent Senate Bills and COVID-19
- Implemented a flexible workplace policy
- Completed requirements of the 2018 American Water Infrastructure Act
- Completed a Worksite Safety Plan
- Completed a draft Cybersecurity Plan

# THE STRATEGIC PROCESS

The Strategic Plan was developed through a collaborative process with the Board of Directors, management and staff. The planning consultant (Means Consulting LLC) interviewed each of the Board members and management team regarding their perspectives on the future challenges for SCV Water. Eleven workshop sessions with the employees and supervisors mined key strengths, weaknesses, opportunities and threats (SWOT) facing the Agency. These interviews were followed by a management workshop to review the results and were shared with the Board at a Board Retreat in September 2023. The Board discussed the strategic challenges facing SCV Water and refined a set of goals for the next 5-Year Strategic Plan. The management team then developed strategies, objectives and key performance indicators for each of these goals, considering the feedback from the SWOT sessions.

The Board of Directors reviewed and accepted the 2024-2028 Strategic Plan on February 20, 2024. The Strategic Plan is structured in a supporting fashion: the Key Performance Indicators (KPIs) track accomplishment of the Objectives, the Objectives support the Strategies, and the Strategies support the Goals, which support the Mission and achievement of the Vision as depicted in Figure 1.

FIGURE 01

## HIERARCHY OF STRATEGIC PLAN ELEMENTS











# SCV WATER'S 5-YEAR STRATEGIC PLAN

The purpose of SCV Water is to unify and modernize water resource management within the Santa Clarita Valley through the efficient, sustainable and affordable provision, sale, management and delivery of surface water, groundwater and recycled water for all uses, and to do so in a manner that promotes the sustainable stewardship of natural resources in the Santa Clarita Valley.

SCV Water was created January 1, 2018, by an act of the State Legislature (SB 634) through the merger of the four water entities in the Santa Clarita Valley. SCV Water serves a population of nearly 300,000 through approximately 75,000 water service connections over 197 square miles. The merger included Castaic Lake Water Agency and its Santa Clarita Water Division, Newhall County Water District and the Valencia Water Company.

The Castaic Lake Water Agency was formed as a wholesale water agency to acquire,

treat, and deliver State Water Project water supply throughout the Santa Clarita Valley. The Santa Clarita Water Division, Newhall County Water District and the Valencia Water Company were the retail water purveyors. Population at build-out is estimated to be 420,000. SCV Water also provides wholesale water to Los Angeles County Waterworks District #36.

This Strategic Plan is the blueprint for how SCV Water will respond to current challenges and make the best of future opportunities for the benefit of our customers. It reaffirms SCV Water's vision and mission and succinctly defines eight Goals related to: Exceptional Customer Service and Stakeholder Engagement, Reliable Infrastructure, Sustainable Water Supply and Resources, Water Quality, Financial Resiliency, High-Performance Team, Environmental Stewardship and Safe and Secure Workplace. It also outlines the specific strategies that we will pursue to achieve this plan.



## **SIGNIFICANT EXTERNAL AND INTERNAL FACTORS SHAPE THIS STRATEGIC PLAN INCLUDING:**

### **Continuous Streamlining of the Agency**

SCV Water has made significant progress in integrating the four previous water utilities into one agency. Continued work is needed regarding emergency preparedness policies and procedures, integrating information and technology systems, and implementing a uniform asset management program.

### **Addressing Climate Change/Variability**

Climate change and variation is receiving significant attention in the State of California. The last three years have seen the lowest initial allocations of water from the State Water Project in history. Providing a resilient/diverse portfolio of water supplies that avoids overreliance on any one source will be an important challenge for SCV Water going forward. The investments necessary to ensure this will be significant. Also, water is heavy and requires energy to treat and deliver. Shifting from fossil fuels to renewable sources of electricity to provide this energy has profound operational and financial implications for SCV Water. Energy is the second largest operating cost for the Agency (behind labor).

This 5-year Strategic Plan is intended to establish the framework for addressing these challenges to maintain reliable and high-quality water service to the Santa Clarita Valley.



## Addressing a Changing Workforce

Much has been written about the pending wave of retirements in the country's workforce and SCV Water will be affected by this. The anticipated loss of staff will require recruiting and retaining the necessary diverse skills to maintain the high level of water service to the community. Many of the skills needed are in short supply in the region and will require creative approaches to filling these skill needs. Continuing to enhance the employee experience and maintaining SCV Water's reputation as a desirable place to work will help the Agency retain and attract talented and dedicated staff. This will be an important focus for SCV Water in the coming years.

## Supply Chain Constraints, Inflation and Rate Setting

Provision of water service depends on access to operating and construction materials and supplies for new and existing infrastructure. It is very capital intensive. Further, COVID-19 ushered in numerous supply chain constraints that continue to affect SCV Water. Access to certain materials and supplies suffered extended delays and, for some materials, continue to be constrained. SCV Water is subject to the same inflationary pressures that our customers see in their lives. These costs must be managed efficiently and recovered fairly from our community. This will be a significant focus area in the next 5-year Strategic Plan.

## Water Supply Portfolio Investments

The Santa Clarita Valley's water supply faces challenges. SCV Water's State Water Project supply has experienced a number of regulatory-driven reliability reductions related to endangered species. The Delta Conveyance Project is one part of the California Water Action Plan, which aims to bolster local self-sufficiency, reduce consumption, improve water supply reliability, and ensure resilience of the Delta to meet future needs. Other investments in groundwater banking and the Sites reservoir are being pursued to continue the Agency's long history of investing in a diverse portfolio approach.

Optimizing the Santa Clarita Valley groundwater basin while balancing endangered species issues will be especially challenging for the Agency. This groundwater resource is a vital asset for the region and integrating its use with stormwater and recycled water production is imperative. SCV Water's leadership role in the watershed and groundwater management positions the Agency to be a collaborative and positive force in sustainably managing these resources. As always, our continued focus on conserving this vital resource and supporting the quality of life in the Santa Clarita Valley will be required.

## Water Quality

SCV Water and its predecessor agencies have a long history of providing high quality water. At minimum, SCV Water meets all drinking water regulatory requirements. Beyond that, though, SCV Water maintains a leadership role in understanding and implementing water treatment for new potential contaminants. The latest example of this is the significant improvements to water treatment that were put in place to manage the so-called "forever chemicals" (Per- and Polyfluoroalkyl Substances or PFAS) in water. We will remain vigilant and protective of the water quality we provide.









# VISION & VALUES

AGENCY

## VISION

EXEMPLARY WATER MANAGEMENT FOR A HIGH QUALITY OF LIFE IN THE SANTA CLARITA VALLEY.

AGENCY

## MISSION

PROVIDING RESPONSIBLE WATER STEWARDSHIP TO ENSURE THE SANTA CLARITA VALLEY HAS RELIABLE SUPPLIES OF HIGH-QUALITY WATER AT A REASONABLE COST.







MATTHEW G. STONE, GENERAL MANAGER

*Our agency is built on a foundation of shared values. These values guide our every action.”*

## AGENCY VALUES



### CREATIVITY

We are industry leaders who embrace change by seeking pioneering solutions and growing our knowledge.



### EXCELLENCE

We strive for excellence in everything we do.



### INCLUSION

We maintain an inclusive culture that is characterized by civility, respect and consideration of all viewpoints and reflects the community we serve.



### INTEGRITY

We commit to the highest ethical standards of honesty, transparency and respect in all our interactions.



### SAFETY

We maintain a healthy and secure work environment.



### TEAMWORK

We are a collaborative team of highly skilled professionals



### TRUST

We act in a transparent fashion that builds trust

# GOALS, STRATEGIES AND OBJECTIVES

SCV Water's strategic planning focuses on eight goal areas that provide direction for achieving the Agency's Mission and Vision.

## GOAL A - EXCEPTIONAL CUSTOMER SERVICE AND STAKEHOLDER ENGAGEMENT:

### ADVOCATE AND MAINTAIN A HIGH LEVEL OF CUSTOMER AND COMMUNITY

### SATISFACTION THROUGH POLICIES, PROGRAMS AND CONTACTS.

This goal establishes a commitment on the part of SCV Water to align with the values of the customers and the community in fulfilling the organization's mission. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

#### STRATEGY A.1 - PROVIDE "BEST IN CLASS" CUSTOMER SERVICE.

- A.1.1 Reassess delegation of authority to Customer Care Representatives for improving first call resolution
- A.1.2 Develop a customer-focused mobile app (e.g., provides customers with current and relevant information so that they can manage and make decisions on their water use, including account access to make payments, the ability to report water-waste, information about water quality and water-saving rebates and resources)
- A.1.3 Track, evaluate and implement emerging technologies for improving community engagement on water issues



AERIAL SHOT OF SCV



**STRATEGY A.2 – PROACTIVELY COMMUNICATE WITH AND ENGAGE OUR COMMUNITY ON WATER MATTERS OF IMPORTANCE TO THE REGION POSITIONING SCV WATER AS A LEADING RESOURCE AND RELIABLE AUTHORITY ON WATER ISSUES.**

- A.2.1 Develop supporting data to make the case for the value of water and implement a targeted outreach program regarding the value of water in preparation for establishing new rates and charges
- A.2.2 Increase public understanding of water issues (e.g., water quality, emergency preparedness, value of water, regulatory and climate challenges, water sources/supplies, watershed planning, water conservation, etc.)
- A.2.3 Implement engagement tools to receive feedback from stakeholders (e.g., Customer Service Survey, Conservation Communications)
- A.2.4 Continue to participate in community events as they align with the Agency’s mission and event participation criteria
- A.2.5 Raise awareness of and demand for conservation programs (e.g., water conservation campaign(s) and related media buys, public and school educational programs, participation at public events, SCV Water website, e-newsletter and social media, etc.)
- A.2.6 Maintain positive public perception of SCV Water as a leading resource and reliable authority on water issues through the Water Academy, Water Matters series and other speaking engagement opportunities
- A.2.7 Work with local media to ensure accurate reporting
- A.2.8 Conduct opportunities to engage with engineering and planning customers to explore optimizing SCV Water review and approval processes
- A.2.9 Update the website to ensure information is current and accessible
- A.2.10 Explore opportunities for open houses and other community engagement approaches
- A.2.11 Research, develop and host a regional Water Summit in the Santa Clarita Valley
- A.2.12 Research and evaluate emerging technology to enhance communications and outreach strategies



**STRATEGY A.3 – ENGAGE WITH LOCAL, REGIONAL, STATE AND FEDERAL GOVERNMENTS, INDUSTRY ASSOCIATIONS AND ORGANIZATIONS TO INFLUENCE WATER POLICY FOR THE BENEFIT OF OUR SERVICE AREA CUSTOMERS.**

- A.3.1 Engage in state and federal activities to further the interests of water in the Santa Clarita Valley
- A.3.2 Continue coordination with SCV Water legislative analysts in communications with state and federal elected officials and their staffs
- A.3.3 Support SCV Water efforts to work with industry associations, academic institutions and special interest groups to influence water policy
- A.3.4 Maintain strong working relationships with local agencies (water agencies, special districts, city and local governments)
- A.3.5 Foster and continue effective working relationships with the Department of Water Resources and other State Water Project Contractors
- A.3.6 Coordinate legislative initiatives concerning Sacramento-San Joaquin Delta and water conservation with legislative analysts, Association of California Water Agencies, State Water Contractors, the California Water Efficiency Partnership, and other necessary parties to enhance the reliability and cost effectiveness of the SCV Water’s SWP water supply
- A.3.7 Develop and initiate research projects to support Agency needs and collaborate/partner with water industry organizations and academic institutions to conduct research that comports with evaluation rigor and standards

**KPIs**

1. Conduct an annual Customer Satisfaction Survey to measure community satisfaction, attentiveness to water use, awareness of rebates and other SCV Water programs and initiatives
2. Grow Agency social media follower count each year (5% increase over prior year)
3. Maintain and report complaint statistics (e.g., water quality, service, pressure, traffic and inquiries)
4. Resolve customer issues within 48 hours







## GOAL B - RELIABLE INFRASTRUCTURE: IMPLEMENT, OPERATE AND MAINTAIN

### WATER INFRASTRUCTURE TO ENSURE SUSTAINABLE WATER SERVICE PROVISION.

Ensuring the availability of infrastructure and its reliable operations is fundamental to meeting the service obligations of SCV Water. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

#### STRATEGY B.1 - PLAN TO MEET DEMAND INCLUDING STORAGE CAPACITY AND INTERCONNECTIONS BETWEEN WHOLESALE AND RETAIL WATER SYSTEMS.

- B.1.1 Complete the Water Master Plan
- B.1.2 Analyze the seismic resiliency of SCV Water's supply portfolio
- B.1.3 Consider life-cycle cost in all project evaluations
- B.1.4 Develop and configure water system hydraulic model for the SCV Water service area
- B.1.5 Implement next phase of the Graphical Information System
- B.1.6 Develop and implement a SCV Water-wide asset management program with end user/operations level asset management tools to enhance performance
- B.1.7 Conduct space study for future potential treatment and well needs

#### STRATEGY B.2 - DESIGN AND CONSTRUCT FACILITIES TO MEET DEMAND INCLUDING STORAGE CAPACITY AND INTERCONNECTIONS BETWEEN WHOLESALE AND RETAIL WATER SYSTEMS.

- B.2.1 Update and carry out capital projects related to water system reliability and sustainability
- B.2.2 Develop standardized designs and specifications (e.g., reservoirs, pump stations, recycled water)
- B.2.3 Develop recycled water policies and ordinances
- B.2.4 Develop and implement a corrosion control program
- B.2.5 Assess and streamline requirements needed for design/build projects
- B.2.6 Evaluate benefits of doing small pipeline designs inhouse
- B.2.7 Maintain/update as-built drawings

EARL SCHMIDT FILTRATION PLANT



## STRATEGY B.3 – OPERATE AND MAINTAIN FACILITIES.

- B.3.1 Maintain all facilities and appurtenances in a consistent fashion to achieve operational efficiency and functionality
- B.3.2 Exercise / replace water system valves and appurtenant infrastructure
- B.3.3 Identify key areas and causes of leaks
- B.3.4 Evaluate opportunities to centralize staff to improve operating efficiency
- B.3.5 Continue providing effective wholesale water service to Los Angeles County Waterworks District #36
- B.3.6 Standardize and schedule the asphalt maintenance program
- B.3.7 Assess current maintenance intervals on infrastructure and benchmark to industry best practice

### KPIs

1. Annual Major Capital Improvement Program (CIP) actual expenditures against planned (target >70%)
2. Maintain construction change orders within 5% of planned costs
3. Maintain Capital design expenditures within 10% of planned costs
4. Standardized Computerized Maintenance Management System by year 3
5. Conduct condition assessment on schedule
6. Track and report loss of/restoration of well production capacity
7. Set maintenance standards for critical components
8. Number of valves exercised compared to target (20% of total annually)
9. Number of meters replaced compared to planned (based on 15-year service life, 7% annually)
10. Maintain 100% of pressure control valves
11. Track and report number and volume of service leaks and main breaks
12. Track and report percent reactive vs planned maintenance



VALLEY CENTER WELL  
TREATMENT FACILITY



**GOAL C - SUSTAINABLE WATER SUPPLY AND RESOURCES: IMPLEMENT PROGRAMS TO ENSURE THE SERVICE AREA HAS RELIABLE SUPPLIES OF WATER AND SUPPORTING RESOURCES.**

By developing and protecting SCV Water’s water resources, SCVWA secures the supply reliability and water quality the Santa Clarita Valley depends on. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

**STRATEGY C.1 – CONDUCT PLANNING TO ENSURE LONG-TERM WATER DEMANDS AND SYSTEM RESILIENCY NEEDS ARE MET.**

- C.1.1 Complete the 2025 Urban Water Management Plan update and all associated Plans
- C.1.2 Continue groundwater basin monitoring and annual reporting of basin conditions in accordance with the Groundwater Sustainability Plan and complete the five-year update to the Groundwater Sustainability Plan (first adopted in 2022)
- C.1.3 Update the Water Supply Reliability Plan every two years to verify the appropriate supply availability given supply and demand uncertainties. Initiate planning for projects identified in the plan to enhance long-term water supply reliability
- C.1.4 Update planning models with assumptions reflecting the most recent regulations and climate change data based on state-of-the-practice climate science approaches to ensure long-term water supply reliability and sustainability
- C.1.5 Renew/extend partnership with Rosedale Rio Bravo
- C.1.6 Support the development and implementation of a Water Demand Factor model for demand forecasting



SUSTAINABLE LANDSCAPE DEMONSTRATION GARDEN AT BRIDGEPORT PARK

## **STRATEGY C.2 – PROTECT THE SCV WATER INTERESTS IN THE STATE WATER PROJECT.**

- C.2.1 Ensure that SCV Water operational plans utilizes available water supplies under its SWP contract and other water supply agreements that rely on SWP conveyance to meet customer water demands and store water for reliability enhancements and dry year use
- C.2.2 Participate in planning, financing, development and potential implementation of the Delta Conveyance Project
- C.2.3 Collaborate with DWR and other State Water Contractors to improve the administration of the SWP in a manner that promotes long-term cost effectiveness, operational reliability and supply availability
- C.2.4 Engage with other State Water Contractors and DWR on SWP facilities' reliability and maintenance
- C.2.5 Support efforts to improve reliability of imported water infrastructure
- C.2.6 Educate and keep community stakeholders informed of the status and importance of the regional and state water infrastructure

## **STRATEGY C.3 ADVANCE THE INTEGRATED MANAGEMENT OF IMPORTED AND LOCAL WATER RESOURCES.**

- C.3.1 Implement the Groundwater Sustainability Plan with SCV Water and other basin stakeholders to maximize integrated resource management, such as through basin monitoring and identification of private well use
- C.3.2 Support preparation of the SCV Water Recycled Water Master Plan Update and California Environmental Quality Act document
- C.3.3 Collaborate with interested partners to develop a foundation for a successful recycled water program
- C.3.4 Coordinate and analyze performance of new and existing water banking and exchange programs
- C.3.5 Coordinate additional dry-year recovery projects for the Rosedale-Rio Bravo Water Storage District Water Banking Program
- C.3.6 Identify and secure access or ownership of suitable groundwater recharge areas in the watershed for development of recharge programs
- C.3.7 Consider and potentially participate in Sites Reservoir project
- C.3.8 Evaluate and implement additional groundwater banking programs as needed



## STRATEGY C.4 ADVANCE DEMAND MANAGEMENT AND ACHIEVE STATE MANDATED WATER USE EFFICIENCY TARGETS.

- C.4.1 Update water conservation planning to develop, implement and provide the framework for the Agency's water conservation initiatives
- C.4.2 Maintain and update the Water Shortage Contingency Plan and Water Conservation and Water Supply Shortage Ordinance
- C.4.3 Support local and statewide regulations consistent with the updated goals of the water conservation plan
- C.4.4 Achieve the annual urban water use objectives in compliance with the Conservation Long-term Framework (AB 1668 and SB 606)
- C.4.5 Work with the Santa Clarita Valley Sustainable Water Action Taskforce or equivalent to further enhance retail purveyor, City and County drought and water conservation activities
- C.4.6 Reevaluate and prioritize outreach targets and methods to maximize rebates and incentive benefits to encourage additional conservation
- C.4.7 Develop equitable conservation/demand management programs to meet current and upcoming regulatory measures
- C.4.8 Evaluate infrastructure technology (AMI/AMR) and operational strategies to better manage demands
- C.4.9 Work with developers and/or permitting agencies to implement the appropriate water efficient landscapes in new development including non-functional turf requirements
- C.4.10 Promote drought tolerant and water efficient landscapes in the community
- C.4.11 Communicate and engage with customers the message that "conservation is a way of life"

### KPIs

1. Track and report progress towards California conservation as a way of life standard
2. Level of conservation program participation (increase 5% annually)
3. Track and report progress on Commercial, Industrial and Institutional performance measure implementation
4. Track and report Non-Revenue Water as a percent of water supplied
5. Percentage of SWP allocation put into beneficial use annually (100%)
6. Complete mandated plans within schedule (yes or no)
7. Sufficient water storage and put-and-take capacity to ensure water banking program success in meeting annual demands (target: 95% confidence level)







**GOAL D - HIGH QUALITY WATER: PROTECT THE QUALITY OF OUR WATER SUPPLIES AND ENSURE OUR DRINKING WATER MEETS OR SURPASSES ALL WATER QUALITY REQUIREMENTS.**

Ensuring the water is safe to drink is a key commitment of SCV Water to the community we serve. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

**STRATEGY D.1 – ACHIEVE 100% COMPLIANCE WITH DRINKING WATER REGULATIONS.**

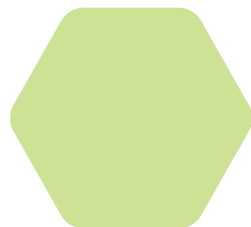
- D.1.1 Meet all applicable water quality regulations
- D.1.2 Evaluate a long-term strategy to provide consistent water quality across the service area (evaluate blending, well head softening, versus point-of-use homeowner expense of water softening systems)
- D.1.3 Engage the public to understand and meet customer’s water quality requirements/demands
- D.1.4 Communicate transparently regarding water quality trends and objectives
- D.1.5 Track and report water quality complaints
- D.1.6 Consolidate operating permits

**STRATEGY D.2 – PROACTIVELY INSTALL, OPERATE, AND MAINTAIN GROUNDWATER TREATMENT INFRASTRUCTURE TO AVOID IMPACTS ON WATER SUPPLY RELIABILITY (E.G., VOCS, PERCHLORATE, PFAS, ETC.).**

- D.2.1 Engage in regulatory agency coordination, communication and collaboration toward the aggressive pursuit of responsible parties
- D.2.2 Continue litigation to hold parties responsible for groundwater contamination

**STRATEGY D.3 – ANTICIPATE AND COMPLY WITH DRINKING WATER REGULATORY CHANGES.**

- D.3.1 Track state and federal statutory and regulatory changes pertaining to the Safe Drinking Water Act
- D.3.2 Maintain interagency water quality communication collaborations
- D.3.3 Track and assess the impact of contaminants of emerging concern (CEC) on SCV Water
- D.3.4 Continue implementation of PFAS treatment
- D.3.5 Continue quarterly meetings with DDW



## KPIs

1. Maintain compliance with Safe Drinking Water Act
2. Track and report loss of/restoration of well production capacity due to contamination

## **GOAL E - FINANCIAL RESILIENCY: MAINTAIN A LONG-RANGE, TRANSPARENT, STABLE, AND WELL-PLANNED FINANCIAL CONDITION, RESULTING IN CURRENT AND FUTURE WATER USERS RECEIVING FAIR AND EQUITABLE RATES AND CHARGES.**

Managing the financial resources entrusted to SCV Water in a prudent manner ultimately reduces the cost of service to the community. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

### **STRATEGY E.1 - ESTABLISH RATES AND CHARGES THAT COVER SCV WATER COSTS.**

- E.1.1 Prepare supporting materials for Board consideration of new rates and charges (including standardized capacity fees, alternative rate structure, etc.)
- E.1.2 Identify and implement new revenue opportunities (e.g., Devil's Den property, energy recovery, etc.)
- E.1.3 Consider drought revenue recovery through update of rate structure
- E.1.4 Optimize grant opportunities to manage rate impacts

### **STRATEGY E.2 - INCREASE FOCUS ON FORWARD LOOKING FINANCIAL INFORMATION.**

- E.2.1 Maintain a financial model that can forecast financial requirements and results through the service area buildout
- E.2.2 Implement tracking and assessment of debt portfolio
- E.2.3 Continue to track and assess SCV Water's debt portfolio

### **STRATEGY E.3 - EXPAND FINANCIAL & PERFORMANCE REPORTING.**

- E.3.1 Establish management dashboards that will communicate operational performance to management and staff

### **STRATEGY E.4 - IMPROVE FINANCIAL RISK MANAGEMENT.**

- E.4.1 Evaluate opportunities to hedge financial risks with insurance



## STRATEGY E.5 - MAINTAIN OR IMPROVE THE AGENCY'S BOND RATING

- E.5.1 Evaluate rating agency requirements to improve bond ratings
- E.5.2 Implement the findings as appropriate

### KPIs

1. Maintain current bond rating
2. Meet debt service coverage ratio as defined in bond covenants
3. Maintain reserve fund targets at >80% as defined by policy
4. Actual costs meet or are less than budgeted costs

STATE WATER PROJECT









## **GOAL F - A HIGH PERFORMANCE TEAM: ATTRACT AND RETAIN QUALITY STAFF MEMBERS AND GROW A CULTURE OF CONTINUOUS IMPROVEMENT THAT FOSTERS SCV WATER'S VALUES.**

SCV Water's services depend on its trained and dedicated workforce. Maintaining a high-performance organization will achieve the goals, mission and vision of the organization. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

### **STRATEGY F.1 - CONTINUE TO IMPLEMENT POST-MERGER INTEGRATION OF SCV WATER.**

- F.1.1 Remain in compliance with the requirements of SB 634
- F.1.2 Optimize use of SCV Water real estate
- F.1.3 Assess facility consolidation opportunities (emergency materials staging, work/life balance issues, inventory, storage, workspace needs)

### **STRATEGY F.2 - PROMOTE THE AGENCY'S VALUES.**

- F.2.1 Communicate SCV Water values across the organization
- F.2.2 Foster a climate of inclusivity and welcomeness. Emphasize to all employees the core mission of SCV Water and how diversity and inclusiveness in all aspects of the organization helps to contribute to that mission
- F.2.3 Continue to provide opportunities for employees to learn about the wider Agency scope of activities, what each department or group is responsible for and how that contributes to our mission
- F.2.4 Explore and provide additional opportunities for employees interested in cultural diversity at SCV Water to engage, learn and participate together

### **STRATEGY F.3 - PROMOTE AN OPEN AND PROFESSIONAL WORK ENVIRONMENT.**

- F.3.1 Communicate the 5-year Strategic Plan to staff and the public
- F.3.2 Establish a tool and process for centralized communications to provide timely updates for all employees to regularly review (e.g., post department updates for project managers)
- F.3.3 Establish a change management process to ensure all affected departments are engaged
- F.3.4 Establish a streamlined chain of communication for decision-making
- F.3.5 Conduct bi-annual employee communications survey
- F.3.6 Continue to provide employees with "bottom-up" communication through all employee meetings (All Hands, etc.)
- F.3.7 Continue to provide General Manager-to-staff memos and quarterly employee newsletters
- F.3.8 Continue to regularly distribute The Pipeline, the employee e-newsletter
- F.3.9 Include staff in key planning/implementing of policy changes (clearly convey rationale for changes)



- F.3.10 Develop an innovation program (including a cross-departmental workgroup) to encourage, capture and deploy new ideas/suggestions
- F.3.11 Continue the EmpAct Committee activities to develop a comprehensive and consistent staff engagement strategy considering:
  - Establishing expectations for type, nature and frequency of communication within and across departments
  - Consider annual meet/greet, employee of the month, new employee mentoring program
- F.3.12 Develop an internal “Points of Contact” tool for staff to use to assist in identifying and involving key individuals in the Agency on particular issues
- F.3.13 Encourage cross department committees to solve Agency problems
- F.3.14 Restart bimonthly Lunch & Learns to include department updates
- F.3.15 Maintain and update Financial and Administrative policies

**STRATEGY F.4 – ATTRACT, TRAIN AND RETAIN QUALITY STAFF.**

- F.4.1 Continue to emphasize employee well-being, role in the organization, supervisor relationships and openness to new ideas
- F.4.2 Ensure SCV Water benefits remain competitive
- F.4.3 Develop clear career path mapping for employees and classifications to understand career growth within their specific roles at SCV Water
- F.4.4 Provide consistent rating approach in performance evaluations and clear metrics regarding criteria for step increases
- F.4.5 Encourage regular informal performance feedback to employees
- F.4.6 Assess alternative work schedule opportunities and trade-offs
- F.4.7 Evaluate span of control (currently up to 15:1)
- F.4.8 Identify and fill key staffing needs (e.g. additional crew in Operations)
- F.4.9 Continue to update job requirements, job classifications and appropriate pay levels
- F.4.10 Research compensation for licenses and certifications through market survey (e.g., crane operators)
- F.4.11 Continue team building strategy to foster trust and shared values (e.g. EmpAct Committee, quarterly all-employee meetings, regular field staff tailgates, etc.)



CUSTOMER CARE REPRESENTATIVE  
ASSISTING CUSTOMER IN LOBBY





- F.4.12 Develop a comprehensive training plan considering:
- Providing facility tours for staff
  - Develop a job shadowing program
  - Develop coaching/mentoring program
  - Ensure all equal positions are trained to the same level
  - Providing training for teamwork and conflict management
  - Provide supervisor and management training (e.g., a Leadership Academy)
  - Continue supervisor training to enhance working knowledge and a general understanding of the SCV Water's recruitment and performance evaluation and other human relations processes
  - Assess adequacy of heavy equipment operations certification coverage
  - Train/re-train on Oracle and IT applications
  - Develop/document employee and Director onboarding approach
  - Promote the Employee Education Reimbursement Program
  - Promote training programs and opportunities through partner agencies (i.e. ACWA/JPIA, AWWA, etc.)
  - Promote personal development and the development of interpersonal skills
  - Train staff on grant administration
- F.4.13 Provide a method for employees to track workforce skills and training achievements.
- F.4.14 Implement and maintain a Health & Wellness Program including an annual health fair, as well as regularly sharing resources for physical, mental, emotional and financial health and wellness

#### **STRATEGY F.5 – OPTIMIZE BUSINESS PROCESSES TO SUPPORT EMPLOYEE PERFORMANCE.**

- F.5.1 Develop and implement a data governance framework including safe, ethical and responsible use of artificial intelligence (evaluate impact of AI on utility operations)
- F.5.2 Identify/document key business processes and procedures. Establish a standard procedure for:
- Change management process
  - As-builts/plans
  - Project closure process
- F.5.3 Identify and assess potential opportunities for automation
- F.5.4 Continue move to paperless processes
- F.5.5 Leverage technology to support inclusivity and participation

#### **STRATEGY F.6 – IMPLEMENT INTEGRATED TECHNOLOGY AND APPLICATIONS ACROSS THE ORGANIZATION.**

- F.6.1 Develop an Information Technology Strategic Plan
- F.6.2 Continue integration of IT/OT system/platforms
- F.6.3 Improve breadth, depth, quality and timeliness of business planning information
- F.6.4 Create useful dashboard(s) for conveying key business statistics to staff

- F.6.5 Implement integrated applications (Asset Management and data access) across the organization
- F.6.6 Continual improvement of technology and data risk management processes
- F.6.7 Expand usage of the agency intranet through education and work process integration
- F.6.8 Continue to maintain regular and routine computer replacement program and management of technology through an asset management approach
- F.6.9 Continue to maintain regular and routine network appliance replacement schedule
- F.6.10 Continue to update and modernize collaborative workspaces and Agency technology to meet the needs of the modern workforce
- F.6.11 Evaluate and implement data culture (e.g., governance and warehousing)
- F.6.12 Create one data system for water supply and production tracking
- F.6.13 Assess field crew communications methods/ technology and improve as appropriate
- F.6.14 Consolidate the various document management systems to one cloud-based Agency-wide solution
- F.6.15 Establish a centralized communications interface with timely updates for all employees to regularly review

WATER TREATMENT PLANT OPERATORS





## KPIs - HR

1. Vacancy rate below 10%
2. Track number and types of certified and licensed staff and continuous professional development
3. Track and report completion of annual performance evaluations
4. Inclusion of employee input on career advancement plans (100%)
5. Conduct bi-annual employee communications survey

## KPIs - TECH

1. Track and report service desk time to respond/resolve an internal customer issue
2. Network availability for Business and SCADA - High availability sites uptime percentage >99%
3. Conduct monthly live technology training (at least 1 training session per month)
4. Tech service desk internal customer satisfaction (satisfaction scores higher than 90%)
5. GIS data quality (modifications and updates >90% completion within 30 days or less from receipt of red-lines)
6. Track and report number of GIS data users (measure of Agency staff using GIS)



## **GOAL G – ENVIRONMENTAL STEWARDSHIP: ACHIEVE ENVIRONMENTAL COMPLIANCE**

### **AND STRIVE FOR SUSTAINABLE POLICIES, PROJECTS AND PRACTICES.**

Ensuring that we conduct our operations in a fashion that is sensitive to the environment and in compliance with environmental requirements is a key commitment of SCV Water to the community we serve. The strategies below define the approach the organization will take to achieve the goal. Objectives are the measurable actions that track progress towards execution of the strategy.

#### **STRATEGY G.1 – COLLABORATE AND ENGAGE WITH PARTNERS TO ADVANCE WATERSHED RESILIENCY.**

- G.1.1 Work through the Groundwater Sustainability Agency to protect the watershed
- G.1.2 Continue to work with NGOs to understand common goals within the community/watershed
- G.1.3 Engage in watershed nutrient and salinity management activities
- G.1.4 Develop and implement a plan for Arundo removal
- G.1.5 Monitor progress in Arundo removal plan and implantation
- G.1.6 Partner with the Sanitation District on recycled water
- G.1.7 Partner with the City of Santa Clarita on recycled water and stormwater capture projects

#### **STRATEGY G.2 – ANTICIPATE AND COMPLY WITH ENVIRONMENTAL REGULATORY CHANGES.**

- G.2.1 Achieve 100% compliance with environmental regulations
- G.2.2 Track state and federal environmental statutory and regulatory activity
- G.2.3 Encourage stakeholder collaborations that support the Agency's goals on environmental stewardship

#### **STRATEGY G.3 – ADVANCE AGENCY SUSTAINABILITY PROFILE.**

- G.3.1 Implement the Sustainability Plan
- G.3.2 Conduct organization-wide energy assessment to identify opportunities to reduce energy use
- G.3.3 Optimize facility operations to minimize power, supplies, chemicals and labor consumption
- G.3.4 Assess opportunities for power recovery from within the distribution system
- G.3.5 Evaluate SCV Water's solar power contracts and options to optimize the cost and value to SCV Water
- G.3.6 Develop and implement a transition plan to meet state electrification regulations
- G.3.7 Assess the carbon footprint of SCV Water
- G.3.8 Develop / implement appropriate emissions reductions
- G.3.9 Implement Battery Storage Project at the Rio Vista Water Treatment Plant



## KPIs

1. Track and report percent change in recycled water use
2. Maintain use of groundwater supplies consistent with the groundwater sustainability plan
3. Track and report greenhouse gas emissions
4. Track and report utility consumption of water and energy
5. Track and report progress towards conversion of fleet to alternative fuels
6. Track and report Renewable Energy Certificates
7. Maintain 90% operability of solar generation facilities
8. Track and report battery use and peak power offsets



## **GOAL H – SAFE AND SECURE WORKPLACE: MAINTAIN THE SAFETY OF EMPLOYEES**

### **AND SECURE THE AGENCY’S PHYSICAL AND CYBER RESOURCES.**

#### **STRATEGY H.1 MAINTAIN A SAFE WORK ENVIRONMENT.**

- H.1.1 Continue to provide all required and recommended safety training
- H.1.2 Continue to emphasize safety through weekly tailgate and safety meetings
- H.1.3 Conduct live confined space entry and rescue drill
- H.1.4 Conduct a live chemical spill response drill with local fire department and/or emergency services contractor
- H.1.5 Improve Earl Schmidt Filtration Plant road access gate
- H.1.6 Evaluate the need for additional Safety Department staff to meet the expanding safety needs of the Agency as it grows
- H.1.7 Expand Safety Committee functions to include topic specific subgroups for critical safety issues

#### **STRATEGY H.2 MAINTAIN A SECURE WORK ENVIRONMENT.**

- H.2.1 Emphasize, communicate and foster a security minded culture
- H.2.2 Evaluate/staff a dedicated security position
- H.2.3 Create Workplace Safety and Security policy for Safety Manual
- H.2.4 Continue the cross-departmental security and cybersecurity workgroup
- H.2.5 Assess and address current vulnerabilities and develop a comprehensive physical security strategy
- H.2.6 Conduct regular physical and cyber trainings
- H.2.7 Complete upgrade of Agency-wide security camera surveillance system

#### **STRATEGY H.3 PLAN AND PREPARE FOR CATASTROPHIC EMERGENCIES.**

- H.3.1 Review and update all Agency-specific emergency preparedness and response plans to ensure accuracy and consistency
- H.3.2 Evaluate materials needs for earthquake response
- H.3.3 Develop plan to convey local supplies within service area should a prolonged outage of imported water infrastructure occur
- H.3.4 Develop emergency power strategy to assure ability to respond to short-term and long-term power supply outages for key facilities
- H.3.5 Coordinate emergency response planning efforts with the regional water agencies, county and cities
- H.3.6 Identify and secure appropriate interagency agreements for emergency support



- H.3.7 Conduct emergency preparedness planning and training for all staff
- H.3.8 Conduct periodic tests of SCV Water’s disaster recovery plan
- H.3.9 Finalize and adopt the draft Cybersecurity Incident Response Plan
- H.3.10 Assess and mitigate fire threat to Agency assets
- H.3.11 Resolve criteria and goals for emergency supply and storage
- H.3.12 Develop Incident Management Team based on ICS structure
- H.3.13 Secure chlorine delivery supply chain
- H.3.14 Assess appropriate customer notification system in the event of outages

### KPIs

1. Complete one ICS-based tabletop emergency exercise drill annually
2. Resolve Safety Support tickets within 15-days of submittal at least 50% of the time; >90% resolved within 30-days
3. Complete annual physical security audit and related necessary remediation
4. Security camera uptime >90% of all cameras or remediated within 72 hours
5. Conduct routine safety inspections and correct >80% of issues noted within 30-days.
6. Maintain the number of days lost to workplace personal injuries to >15% below the industry rate (as reported in BLS)
7. >90% completion of all compliance safety training for staff (determined by employee’s job assignment)
8. Monthly cybersecurity training completion >85% participation completion
9. Maintain industry best practices regarding cybersecurity



TECH SERVICES

# GLOSSARY

The following key terms are used in this Strategic Plan:

<b>Action Plan</b>	A detailed set of tactical actions that will be developed in order for the strategies/objectives to be achieved.
<b>Values</b>	Non-negotiable standards that the staff and the Board believe in and embody how they will act individually and as an organization.
<b>Goal</b>	SCV Water's commitment to the community it serves.
<b>Key Performance Indicator</b>	Selected measure to indicate performance against a Strategic Plan Goal.
<b>Mission</b>	The primary reason(s) for the existence of the organization.
<b>Objective</b>	Measurable work activity that, when accomplished, will directly lead to the success of the strategy.
<b>Issue</b>	A problem or opportunity facing SCV Water.
<b>Strategy</b>	How an issue is solved to achieve the goal.
<b>Strategic Plan</b>	A structured plan to drive SCV Water to achieve its goals.
<b>SWOT Analysis</b>	Description of strengths, weaknesses, opportunities and threats to identify areas of focus in the Strategic Plan.
<b>Vision</b>	What SCV Water aspires to become.







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