



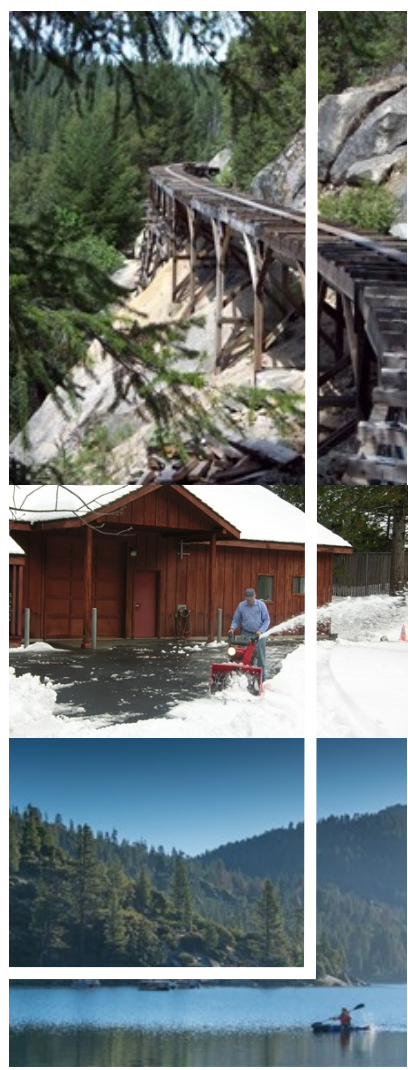
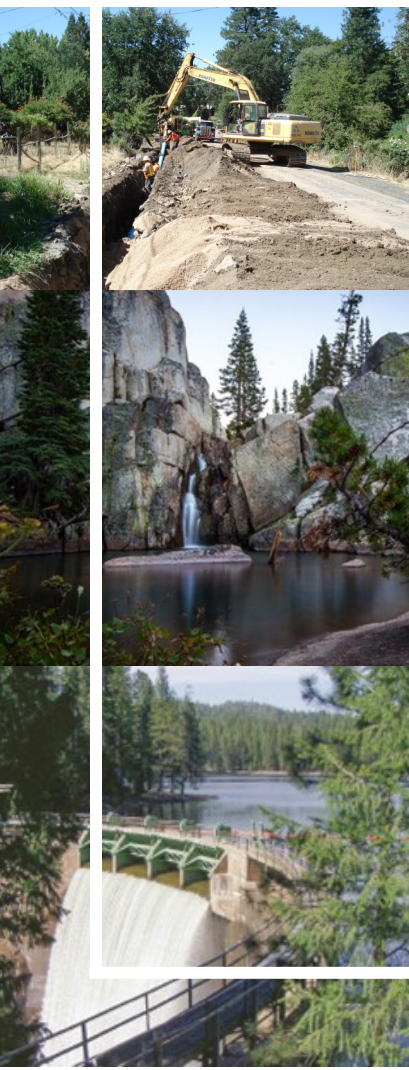
TUOLUMNE UTILITIES DISTRICT

2019 STRATEGIC PLAN

A GREAT COMMUNITY WITH A BIG HEART

TUOLUMNE COUNTY IS A MAJOR GATEWAY to the Sierra. The area enjoys the accessibility and full beauty and four distinct seasons. Tuolumne is known for its two historic state parks, Columbia and Jamestown, numerous recreational areas and for its amazing people who care about their neighbors. California living in a great community to raise a family. The communities within Tuolumne County are small enough to know your neighbors and large enough to have the amenities found in small metro communities. Residents enjoy the amazing opportunity of living near Yosemite National Park and taking advantage all the outdoor recreational opportunities that the region provides. Tuolumne Utilities District provides water and wastewater services to most of the residents of Tuolumne County.

ADOPTED June 11, 2019



TUOLUMNE UTILITIES DISTRICT

2019 STRATEGIC PLAN



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Record of Plan Updates

Date	Description of Update
06/11/2019	Plan adopted by TUD Board of Directors Resolution No. 7-19

PURPOSE

This Strategic Plan (Plan) exists to empower Tuolumne Utilities District (TUD/District) to set overall goals and develop a plan to achieve them. District Board of Directors and Staff took a step back from the day-to-day operations to evaluate where the District is headed and how best to organize District objectives and priorities.

The Plan was formed in early spring of 2019 by the District's Board of Directors and staff through a series of public workshops which facilitated public participation with the understanding that the Plan is to be a living document that will be reviewed regularly and revised as needed to better serve the District and Tuolumne County. The Plan was purposefully fashioned as a succinct, workable document so that it can be easily referenced to: Generate focused goals, adopt comprehensive objectives, communicate values and develop a path to help establish the best use of our resources to accomplish District goals and objectives.

THE ORGANIZATION

TUD IS SITUATED WITHIN the Stanislaus and Tuolumne rivers watersheds and has its origins in the California Gold Rush of 1849. The TUD service area is located 148 miles east of San Francisco and is nestled in the picturesque and historic central Sierra foothills. The historic, gravity-fed water delivery system that is integrated into the rural lifestyle of the community presents strategic challenges and benefits. Following approval by Tuolumne County voters, TUD was formed in 1992 by consolidating two existing water agencies. TUD has since acquired additional water and wastewater systems, in varying conditions, previously owned and operated by predecessor agencies. The District provides water and wastewater services throughout much of Tuolumne County (Population approximately 52,000), including the City of Sonora and covers a broad range of topography. The District continues to prioritize and fund capital improvement projects in an effort to improve water and wastewater infrastructure.

The water system is diverse and varied with approximately 95% of the water the District distributes originating from the South Fork Stanislaus River and is impounded in Pacific Gas and Electric Company's (PG&E) Lyons and Pinecrest Reservoirs. PG&E owns and operates a canal and flume system to convey water from Lyons Reservoir to the Phoenix Powerhouse. The District owns and operates a total of 72 miles of ditch, flume, pipe, and tunnel infrastructure that diverts water from the PG&E system at various locations. The majority of TUD's customers reside in or near the community of Sonora and additionally serves customers in several other surrounding communities. The District utilizes approximately 140 miles of wastewater pipeline to collect up to 500 million gallons of wastewater per year. The Sonora Regional Wastewater Treatment Plant was constructed in the late 1970s and on average treats 1.4 Million Gallons Per Day (MGD). TUD also has a regional reclamation system for the reuse of effluent for irrigation on pasture lands.

TOP TUD BOARD PRIORITIES INCLUDE:

- › Secure Water Supply
- › Secure surface water supply from New Melones
- › Regional Septage Receiving Facility Upgrade
- › Regional Wastewater Treatment Plant Upgrade
- › Sonora Regional Water Treatment Plant Consolidation



DISTRICT SERVICES

The District is a water and wastewater utility that has 587 raw water connections, 14,105 water connections and 6,184 wastewater connections. District's services are generally described as follows:

Water Supply

TUD receives water supply from the Sierra Snowpack. This water is delivered to TUD starting at the South Fork of the Stanislaus River at Lyons Reservoir via the Tuolumne Main Canal by agreement with Pacific Gas and Electric Company (PG&E). PG&E owns and operates Pinecrest Lake, Lyons Reservoir and the Tuolumne Main Canal. In the summertime, TUD normally receives stored water first from Lyons Reservoir, then second from water stored in Pinecrest Lake. Approximately, 95% of TUD's customers receive water supplied through the Main Canal into the ditch conveyance system and 5% of water is supplied through wells. "End of Spill" is a point in time that occurs after the snow has melted and flow in the River has subsided to where the flow out of Lyons Reservoir exceeds the flow into it. The "End of Spill" occurs at the end of the spring snow-melt runoff which typically occurs about July 1st or later. At this point in time, water stored in Lyons Reservoir is relied upon to supply Tuolumne County through the summer until labor day. However, Lyons Reservoir is relatively small and only holds enough water to support normal Tuolumne County water needs for about 65 days. After Labor Day water is normally drawn down from Pinecrest Lake to supplement Lyons Reservoir through the fall and early winter.

Ditch System/Raw Water Delivery

The TUD ditch system is extremely unique and unlike any other water conveyance system. Each year the District undertakes the repair and maintenance of its 72 miles, 1850's era, ditch system in order to deliver water to domestic and agricultural users that rely on raw water delivery for limited non-potable purposes. The maintenance and upkeep is required in all weather conditions to keep the water flowing, including the very labor intensive activity of "floating snow" when necessary. The ditch system represents a significant investment in raw water transmission by the District for its customers. Staff monitors and calibrates ditch water flows throughout the year and especially during the summer months to ensure reliability. Continual, year-round maintenance and upkeep is required to keep the ditch system service ready. Staff also maintains the Phoenix Lake dam which is owned by the District and annually inspected by the state Division of Safety of Dams.



Water Treatment

The District operates 11 permitted water systems including 3 groundwater systems, 15 water treatment plants, 78 treated water storage tanks and reservoirs, 51 booster stations. There are approximately 50 wells in varying state's of activity.

Potable Water Distribution

With respect to treated water, staff also maintains the distribution network ensuring that water distribution mains are maintained in working order. Water distribution staff performs routine maintenance including flushing of water mains that helps maintain underground pipes over the long term. The District's flushing program is integral to maintain infrastructure in good working order and for the provision of clean drinking water. TUD's distribution staff has a great deal of contact with the public.

Wastewater Collections

The District operates and maintains 140 miles of sewer collection system, 30 sewer lift stations collecting approximately 1.3 million gallons of wastewater each day and sent for treatment to the Sonora Regional Wastewater Treatment Plant. Flushing and video assessment are critical and labor-intensive preventable maintenance activities required to prevent spills and/or breaks. Infiltration and inflow (I&I) are another critical aspect of wastewater collection that is continuously being addressed and integrated. Wastewater collection is highly regulated by both the federal and state governments requiring that District operations adhere to mandated standards.

Wastewater/Sewer Treatment

The District provides wastewater collection, treatment, and disposal services to the majority of the population of Tuolumne County. The District owns and operates the Sonora Regional Wastewater Treatment Plant, a conventional trickling filter secondary wastewater treatment plant that treats approximately 1.3 million gallons of wastewater each day. The Sonora Regional Wastewater Treatment Plant was originally constructed in the late 1970's. The District also operates the Twain Harte Wastewater Treatment Facility and transfers that effluent by way of an interceptor line to the Sonora Regional Wastewater Treatment Plant for final processing. The District also operates the county's only septage receiving facility and serves neighboring counties. Wastewater treatment is highly regulated by both the federal and state governments requiring that District operations adhere to mandated standards. The District's Quartz Reservoir is managed by wastewater staff and provides reclaimed water to agricultural interests for production of hay and alfalfa as feed for cattle.



MISSION, VISION & CORE VALUES

Mission

Provide Responsible Water and Wastewater Services for our Customers with Great Customer Service in a Socially, Financially and Environmentally Responsive Manner at a fair value.

Vision

Sustainable Water Resources; Safe, Secure and High-Quality Water; Effective Collection, Treatment and Disposal of Wastewater and best use of TUD Properties for community Benefit.

Core Values

Leadership

The District is proactive in forwarding & protecting the interests of our customers and the community.

Stewardship

The District supports “Best Management” practices, respects the rich cultural history of our community and manages resources on a sustainable basis for future generations.

Transparency & Open Communication

Information freely flows to and from all levels of the organization, respect and thoughtful consideration is given to each other's differences and opinions, and all participants are provided the same information.

Collaboration & Community Engagement

Board & District Staff listen and openly share ideas to achieve better decisions and outcomes with our customers and partners.

Organizational Integrity

Respect, Commitment, Responsibility, Ethical Behavior, Safety, High Quality Customer Service, Teamwork & Accountability are the hallmark of the organization.

Highly Effective and Safe Workforce

The District supports well-qualified, trained and committed employees who work safely and give their best to get the job done and provide the best customer service available.

STRATEGIC GOALS

Strategic Goals are the result of the major undertaking where District Staff and Board of Directors met to discuss where the District is now, where does it want to go and how it plans to get there. Staff and Members of the Board looked into opportunities, challenges and needed investment that are likely to arise in the future. Strategic goals were developed as a result of this collaborative process.

1. Enhance and improve water security
2. Improve wastewater collection, treatment, and recycled water use through facility modernization
3. Develop partnerships for the benefit of the community
4. Enhance programs to promote organization efficiency and development
5. Follow best financial management & fiscal planning practices
6. Provide great customer and community services practices
7. Pursue environmental stewardship opportunities and community programs

Goal 1 Enhance and improve water security

Strategy 1. Advance, defend and expand District control over water supply.

Action 1	Pursue water rights, water contracts, area of origin rights and/or other methods to improve water supply reliability.
Action 2	Pursue emergency water supplies through water transfers and/or water contracts to mitigate potential impacts of droughts, fires and other catastrophic events.
Action 3	Consider acquisition and development of water storage and conveyance facilities.
Action 4	Manage and defend against State and Federal regulatory actions that potentially harm the Districts ability to provide a reliable water supply.
Action 5	Educate legislative and community leaders on District water supply issues and engage appropriate professionals to assist in securing a more reliable water supply.

Strategy 2. Reduce system losses and improve water system efficiencies to meet multiple community benefits.

Action 1	Identify areas of potential system failure and/or frequent leak maintenance to prioritize repairs, improvements and/or upgrades.
Action 2	Identify and pursue active pressure zone management to improve reliability and efficiency.
Action 3	Conduct studies on the raw water delivery system to improve efficiency and identify construction methods to maintain and enhance the cultural, recreational and historical integrity of the system.
Action 4	Pursue necessary maintenance and efficiency improvements to the raw and treated water conveyance systems.
Action 5	Implement Capital Improvement Plan (CIP) and Capital Outlay Budget.

Strategy 3. Consolidate water treatment plants to improve efficiencies and reliability and reduce maintenance and operations costs.

Action 1	Complete land acquisition and preliminary engineering identified in the Treated Water System Optimization Plan (TWSOP).
Action 2	Identify and prioritize improvements to existing infrastructure that will require upgrades and/or replacement to accommodate TWSOP.
Action 3	Seek State and Federal appropriations for TWSOP implementation.
Action 4	Implement Capital Improvement Plan (CIP) and Capital Outlay Budget.

Strategy 4. Enhance and optimize water storage facilities and provide back-up power supplies at pumping and other critical facilities.

Action 1	Identify, prioritize and implement repairs, upgrades and/or consolidation of water storage tanks.
Action 2	Identify, prioritize and implement back-up power supply systems at pump stations and other critical facilities.
Action 3	Plan and develop strategically located storage regulating reservoirs to provide multiple benefits to the raw water conveyance system.
Action 4	Implement Capital Improvement Plan (CIP) and Capital Outlay Budget.

Strategy 5. Promote water conservation and water use efficiency programs.

Action 1	Maintain and enhance existing water conservation programs and partnerships.
Action 2	Provide customer outreach and assistance in implementing water conservation.
Action 3	Develop and maintain a community landscape native plant demonstration garden.

Goal 2 Improve wastewater collection, treatment, and recycled water use through facility modernization.

Strategy 1. Upgrade and/or replace outdated and inefficient wastewater treatment facilities.

Action 1	Upgrade regional septage receiving facilities.
Action 2	Replace and upgrade sludge drying equipment and facilities.
Action 3	Identify, prioritize and implement wastewater treatment plant (WWTP) equipment and facility upgrades and improvements, including, but not limited to, improved security, road construction, lighting, administrative facilities, treatment processes, storm water conveyance, and other equipment and facilities.
Action 4	Prepare Title 22 Report and apply for new wastewater treatment and disposal permit (Waste Discharge Requirements – “WDR”).
Action 5	Identify and obtain easements and rights-of-way for district facilities where required.
Action 6	Implement Capital Improvement Plan (CIP) and Capital Outlay Budget.

Strategy 2. Repair and/or replace aging wastewater collection pipelines, Twain Harte Interceptor and lift stations to avoid sewer spills.

Action 1	Prioritize and implement a plan to repair and/or replace collection system infrastructure.
Action 2	Prioritize and implement a plan to repair and/or replace Twain Harte Interceptor and to determine what customers can connect to these systems.
Action 3	Prioritize and implement a plan to repair, improve and/or replace wastewater collection system lift stations.
Action 4	Identify potential areas for new customer connections due to failing private systems.

Strategy 3. Secure long-term recycled water reclamation sites.

Action 1	Through land purchases, easements, programs and/or contracts, obtain long-term rights to recycle treated effluent for beneficial uses.
Action 2	Implement Capital Improvement Plan (CIP) and Capital Outlay Budget.

Goal 3 Develop partnerships for the benefit of the community.

Strategy 1. Coordinate work with local agencies (City, County, special & school districts, Tribes, community organizations, etc.).

Action 1	Work closely with local agencies to coordinate construction projects to maximize cost savings and reduce public inconvenience.
Action 2	Set-up periodic multi-agency meetings with staff and elected officials to establish local priorities and to make plans for joint activities.
Action 3	Seek local, Tribal, Regional, State and Federal partnerships to obtain grant funding for multiple benefits.

Strategy 2. Work with regional agencies and industry associations to further District goals and priorities.

Action 1	Work closely with Mountain Counties Water Resources Association (MCWRA), the Association of California Water Agencies (ACWA), Water Environment Federation (WEF), California Special Districts Association (CSDA) and other industry organizations to promote District interests.
Action 2	Cultivate leadership roles for District Directors in regional and industry associations and committees to maximize District involvement in key issues of importance.
Action 3	Seek regional partnerships to obtain grant funding for multiple benefits.

Strategy 3. Work with local, state and federal agencies and elected officials on permitting, grant programs, water rights, and regulatory/legislative issues.

Action 1	Work closely with Department of Water Resources (DWR), the Bureau of Reclamation, the U. S. Department of Agriculture (USDA), United States Army Corp of Engineers and other water purveyors on obtaining grant funding for facilities and on obtaining water rights.
Action 2	Seek new operational permits and grant funding for facility consolidation and upgrades through State and Federal agencies.
Action 3	Seek local, state and regional partnerships to obtain grant funding for projects that provide multiple benefits to the community.
Action 4	Continuously monitor regulatory issues, legislation and environmental standards in coordination with local, state and federal agencies.
Action 5	Acquire consulting expertise to promote District interest in legislative and regulatory issues and assistance in securing State, Federal and Private grant funding.

Strategy 4. Coordinate land use and water/wastewater resources planning with Local, Tribal, Regional, State and Federal planning agencies.

Action 1	Coordinate General Plan and other mandatory and optional planning document updates and implementation with City and County.
Action 2	Seek special district representation on LAFCO with other local agencies.

Goal 4 Enhance Programs to promote Organizational Efficiency and Development.

Strategy 1. Use the *Joint Labor - Management Committee (JLMC)* to improve organizational communication and decision-making.

Action 1	Schedule regular meetings of the JLMC to discuss issues and activities.
Action 2	Seek input from JLMC members on employee training, succession planning, job functions and other employee issues.

Strategy 2. Prioritize employee job training/cross-training to improve employee skills and organizational flexibility.

Action 1	Utilize department, District wide and outside trainers in developing curriculum to train and cross-train employees.
Action 2	Develop incentives for employees to train and cross-train.
Action 3	Human Resources Department to maintain and develop training records, job descriptions and training guidelines to enhance succession planning opportunities.

Strategy 3. Maintain active Safety Training, Emergency Preparedness and Risk Management Programs.

Action 1	Prioritize safety training and develop incentives for participation.
Action 2	Human Resources Department to maintain safety records and coordinate safety training program guidelines.
Action 3	Continue to evaluate District wide risks and conditions at facilities to enhance safety and security.
Action 4	Coordinate with Local, Tribal, Regional, State and Federal agencies on emergency preparedness, response and recovery.

Strategy 4. Support and enhance Board, Management and Staff educational and leadership opportunities to better serve the community.

Action 1	Encourage participation at local, regional and state-wide events that provide Board, Management and Staff training and leadership opportunities.
Action 2	Create opportunities for joint Board – Management training sessions.

Strategy 5. Identify policies and procedures to improve efficiency in District communication and organizational performance.

Action 1	Perform comprehensive update of District wide policies and procedures.
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Goal 5 Follow Best Financial Management & Fiscal Planning Practices

Strategy 1. Identify and prioritize projects through the *Capital Improvement Plan and Budget*.

Action 1	Annually review the Capital Improvement Plan in order to adjust and re-prioritize projects and construction activities to determine progress in completing priority capital projects.
Action 2	Annually review and update the budget.

Strategy 2. Determine appropriate grant funding opportunities, priorities and partners.

Action 1	Submit grant applications for high priority projects to maximize rate payer funds with eligible grants.
Action 2	Coordinate grant applications with local, private, regional and state agencies/organizations to obtain multiple community benefits and enhance chances for grant award.

Strategy 3. Identify areas to reduce costs, increase revenues, consolidate services and improve efficiencies to provide cost-effective services.

Action 1	Analyze District organization and methods of service delivery to determine if cost savings and consolidations are feasible.
Action 2	Seek methods to improve efficiencies and reduce lead-time on designing and constructing capital improvements.
Action 3	Explore revenue enhancements by analyzing current return on investments, conducting a Proposition 218 study in calendar year 2020, seek grant funding where appropriate, identifying the cost/benefit of extending services to new customers and investigating a District-wide assessment district.
Action 4	Implement new technology and computer hardware and software to improve internal accounting and project management, as well as asset management, mapping, and maintenance and repair of equipment and facilities.
Action 5	Review current District policies and procedures with an eye on improving efficiencies.

Strategy 4. Maintain a structurally balanced budget, utilize user fees to cover the cost of services provided, maintain adequate reserves in all funds, and maintain financial Records in accordance with Generally Accepted Accounting Principles (GAAP).

Action 1	Review current policies and procedures for consistency with <i>Best Management Practices</i> .
Action 2	Revise and update budgetary, financial and administrative policies and bring revised/new policies to the Board for adoption.

Goal 6 Provide Great Customer and Community Service Practices

Strategy 1. Maintain a high-level of customer service as a top priority for the District.

Action 1	Provide customer service training for new employees, as well as on-going training for existing employees.
Action 2	Develop, identify and promote activities and policies that focus on customer relationships, treating customers with respect, responding to customer inquiries in a timely manner and listening to what customers have to say.

Strategy 2. Provide a high-level of community outreach and engagement in respect to District activities, projects and issues.

Action 1	Maintain an active website with up-to-date information on District activities, issues and projects.
Action 2	Provide for community feedback, review and response to comments received as a result of outreach activities.
Action 3	Issue periodic newsletters, surveys, notices and other materials to inform and seek input from members of the public, local agencies, community organizations and stakeholders.
Action 4	Enhance, develop and market programs that benefit District customers.

Goal 7 Pursue Environmental Stewardship Opportunities and Community Programs

Strategy 1. Identify projects, activities and programs with multiple community benefits and prioritize for implementation.

Action 1	Seek Local, Tribal, Regional, State and Federal partners to improve project success and community involvement.
Action 2	Seek community input and partnerships to manage community activities on District properties and facilities where appropriate.

Strategy 2. Provide community outreach in the early stages of project or program development.

Action 1	During the initial stages of project and/or program development identify communities of potential impact and seek consultation and input.
Action 2	During the initial stages of project and/or program development identify community and agency partnerships that will allow for greater community benefits.

Strategy 3. Use resources efficiently, reduce waste and minimize negative impacts to the environment.

Action 1	Practice resource conservation by making the most efficient use of resources and energy saving devices when developing District projects.
Action 2	Practice pollution prevention by minimizing contamination to the environment through thoughtful project design and the incorporation of redundant systems and backup energy supplies.
Action 3	Incorporate occupational health and safety considerations into projects and facilities where employees will be working.

PLAN REVIEW, REVISIONS & REPORTING

The District will review this Plan annually to ensure that it continues to be accurate and best serve the needs of the District. All revisions must be approved by the Board of Directors. A record of revisions is kept on the Table of Contents page.

At the end of each fiscal year, the General Manager will prepare a brief report for the Board of Directors summarizing the progress that has been made toward attaining the District's goals and objectives. Reports will be included in the Appendix of this Plan.