



Nipomo Community Services District

Strategic Planning Workshop #1

April 17, 2026

Agenda

Introduction and purpose of the workshop

Brief review of recent progress.

Small and whole group discussions to build shared understanding of the District's current performance and progress on issues and challenges

Small and whole group discussions on the key challenges and opportunities confronting the District in the coming years

Summary of selected issues from the interviews

Vision Exercise

Large group exercise to identify preliminary, most important issues, challenges, opportunities, and priorities from the day

Mission and values review

Next steps leading to completion of the updated strategic plan

Purpose of the Workshop

The primary purposes of this first workshop are to:

Develop a shared understanding of the critical strategic issues – challenges and opportunities – facing the District.

- **Begin to identify the priority issues**
- **Begin building consensus for direction on resolving challenges and taking advantage of opportunities**

Strategic Planning

Process of envisioning a desired future and translating it into broadly defined goals and objectives.



Helps focus limited resources to ensure selected **priorities** are accomplished.

These are extra -- above and beyond the many activities to operate the District each day.

Also, the **key actions (work)** we need to undertake to move forward.

Includes **setting priorities, reality checking, ensuring resources, and a plan for reporting, monitoring progress, and adapting over time.**

Strategic Planning

Getting your arms around current and upcoming challenges and opportunities

So you can proactively develop better solutions

While avoiding and mitigating risks and surprises



Guidelines for Today

Generally, I will ask each person to provide their input to each question – it is important that each person engage.

Please write the answer on one of the cards before responding. We will collect and later record them.

Please listen well to each other

Seek to understand others' points of view, especially if you disagree.

Please limit phone and computer use.

Courtesy is always helpful.

Questions and clarifications are appropriate at any time, but we will hold debate until later in the session.

We will take a working lunch about noon and breaks when needed.

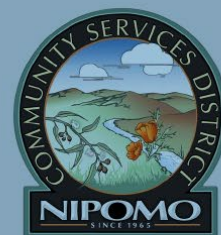
Please relax and focus on participating and let me manage the workshop.

Report on Progress of the 2017 Strategic Plan



Nipomo Community Services District 2017 Strategic Plan Update

Prepared by Rauch Communication Consultants, Inc.



BOARD OF DIRECTORS

Dan A. Gaddis • President, Ed Eby • Vice-President, Bob Blair • Director,
Craig Armstrong • Director, Dan Woodson • Director

NIPOMO COMMUNITY SERVICES DISTRICT

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Nipomo CSD Report on Current Strategic Plan

Nipomo CSD – Current Strategic Plan



8 Defined Goals



(A) Activities for Completion
(B) Ongoing Activities

Goal 1. WATER SUPPLIES.

Actively plan to provide reliable water supply of sufficient quality and quantity to serve both current customers and those in the long-term future.

1.A. ACTIVITIES FOR COMPLETION

- ~~▶ A.1 Obtain the necessary permits to utilize the full capacity of the Supplemental Water Project pipeline. [2025]~~
- ~~▶ A.2 The District shall provide new service connections to customers when the NCSD Board lifts Severe Criteria condition groundwater pumping restrictions. [July 2018]~~
- ▶ **A.4 NCSD will make available imported water to other purveyors once the NSWV pipeline is permitted to be used at full capacity. [Undetermined]**
- ~~▶ A.5 Expedite funding and implementation of final phases of the Supplemental Water Supply Projects (up to 3,000 acre-feet). [2023]~~
- ▶ **A.6 Update the Water Master Plan to ensure: long-term quality; reliability; cost-effectiveness; and ability to meet customer needs and regulatory requirements. [3-5 years]**
- ▶ **A.7 The District will seek to sell temporary water to other purveyors to utilize take or pay water and offset costs. [2025]**

Goal 1. WATER SUPPLIES.

1.B. ONGOING ACTIVITIES

- ▶ **B.1 Seek to have the County implement sustainable water supply policies that match the level of development they approve, including all the features described in the Water Resources Policy Statement.**
- ▶ **B.2 Engage with other local and regional organizations to develop solutions to long-term water supply challenges such as providing emergency backup supplies, and ensuring long-term water supply reliability, etc.**
- ▶ ~~B.3 Seek opportunities for mutually beneficial shared use of the Supplemental Water Project pipeline once it is permitted to transmit its full capacity.~~
- ▶ **B.4 Maintain the Water Shortage Response and Management Plan to respond to drought and other supply emergencies.**

Goal 2. FACILITIES THAT ARE RELIABLE, ENVIRONMENTALLY SENSIBLE AND EFFICIENT

Plan, provide for and maintain District facilities and other physical assets to achieve reliable, environmentally sensible, and efficient District operations.

▶ 2.A. ACTIVITIES FOR COMPLETION

- ▶ ~~A.1 Complete the Supplemental Water Project (NSWP). (2024) {Pomeroy Line [start design May 2023 – Bid in Jan. 2024] & Interties Left to complete [Bid June 2023]}~~
- ▶ ~~A.2 Develop a pathway to complete needed upgrades and replacements for the Blacklake wastewater treatment plant. [2018]~~
- ▶ **A.3 Carry out treatment plant expansion on the scheduled trigger of 700,000 gallons per day of capacity. District is currently at 650,000 gallons per day (2-3 years).**

Goal 2. FACILITIES THAT ARE RELIABLE, ENVIRONMENTALLY SENSIBLE AND EFFICIENT

2.B. ONGOING ACTIVITIES

- ▶ **B.1 NCSD shall maintain long-range infrastructure management, upgrade and replacement planning.**
- ▶ **B.2 Manage both collection systems with the objective of zero spills and zero permit violations from all regulatory oversight agencies and to ensure the long-term preservation of assets.**
- ▶ ~~B.3 Manage both treatment facilities with the objective of zero permit violations from all regulatory oversight agencies and to ensure the long-term preservation of assets.~~

Goal 3. PERSONNEL AND ORGANIZATION.

Maintain a qualified, long-term and productive workforce to assure an effective organization.

3.A. ACTIVITIES FOR COMPLETION

A.1 Raise the Bar on Operational Effectiveness. [Ongoing with Annual Report]

Implementation: Staff defined and follows operating rules and agreements with purveyors, coordinates with the city of Santa Maria on a daily basis on operating the SWP, and is managing the transmission system at a more sophisticated level.

~~A.2 Plan for staff succession.~~

~~Develop a 3 to 5 year staff succession plan by January 2019~~

Goal 3. PERSONNEL AND ORGANIZATION.

3.B. ONGOING ACTIVITIES

B.1 Ensure the District is adequately staffed with high quality, long-term employees and supported by appropriate contractors and partnerships.

B.2 Maintain a strong commitment to a safe work place.

B.3 Maintain effective disaster response capability. This includes operational resiliency in the face of floods, earthquakes and other emergencies.

Goal 4. FINANCE.

Maintain conservative, long-term financial management to minimize rate impacts on customers while meeting program financial needs.

4.A. ACTIVITIES FOR COMPLETION

- ~~A.1 Develop a financial plan to fund the infrastructure buildout, including the fair share from participants in the water supply pipeline. [Prioritize after the current rate study is complete] (2018)~~
- ~~A.2 Ensure billing processes are efficient, cost-effective and fair. Evaluate the potential costs and benefits of monthly compared to bi-monthly billing. [2018]~~
- ~~A.3 Develop a Near-, Mid-, and Long-Term Plan to Pay for Take-or-Pay Water. Evaluate potential and options for ramping rates over time compared to making rate jumps as the water becomes available. [2022]~~

Goal 4. FINANCE.

4.B. ONGOING ACTIVITIES

- B.1 Evaluate, plan for and maintain finances that are adequate for all needs, stable, and reliable over the long-term.**
- B.2 Ensure that purveyors and others pay their fair share of financing water supply, supplemental water, conservation, and sustainability of the regional water supply. Purveyors should pay their share up front before getting water in order to help finance next phases of supplemental water program.**
- B.3 Monitor liabilities for post-employment benefits. Continue to track State progress to reform post-employment benefit programs.**
- B.4 Monitor opportunities for grant funding.**
Implementation: Staff is pursuing Proposition 1 grant funding and looking for other ways to pay for infrastructure improvements.
- B.5 Maintain adequate rates to fund future capital replacements.**
- B.6 Maintain sound investment policy and investments.**

Goal 5. OPERATIONS.

Maintain a proactive program to ensure readiness of systems and cost-effectiveness of operations.

5.A. ACTIVITIES FOR COMPLETION

~~A.1 Ensure efficiency and effectiveness in operations, including evaluating Automated Meter Reading. [2019]~~

A.2 Utilize metrics for measuring operational effectiveness to ensure improvements in reliability, and cost-effectiveness of operations and maintenance.

Goal 5. OPERATIONS.

5.B. ONGOING ACTIVITIES

- B.1 Continue to improve maintenance management programs for both water and wastewater systems to ensure quality and reliability of services, to maintain warranties, and protect investment in new facilities (maintenance management).**
- B.2 Meet all regulations.**

Goal 6. GOVERNANCE AND ADMINISTRATION

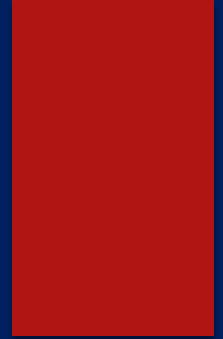
Conduct District activities in an efficient, equitable and cost-effective manner.

6.A. ACTIVITIES FOR COMPLETION

A.1 Periodically review, update and reaffirm District policies and procedures [incorporated in our processes]

~~A.2 Conduct annual customer satisfaction survey. [Annually]~~

Goal 6. GOVERNANCE AND ADMINISTRATION



6.B. ONGOING ACTIVITIES

B.1 Utilize technology to maximize productivity and communications.

B.2 Provide excellent customer service.

Goal 7. COMMUNICATION

Use public outreach to communicate effectively with the public to obtain their input and build understanding and support for the District.

7.A. ACTIVITIES FOR COMPLETION

~~A.1 Develop and implement a complete outreach plan and timeline with specific goals and budget each year. [2018]~~

~~Implementation: Will continue to maintain the staffed position that utilizes current communication strategies including multiple online platforms, monthly news articles for the local paper, monthly and quarterly newsletters, advertisements in other traditional media platforms and other outreach efforts.~~

7.B. ONGOING ACTIVITIES

B.1 Maintain productive communication and relationships with key stakeholders, such as city, County, State and Federal legislators, service clubs, etc. As appropriate, plan and assign for this role.

Goal 8. ADDITIONAL COMMUNITY SERVICES

Staff should focus on meeting the goals and objectives of existing services. Adding new services will be considered on a case-by-case basis and entered into only if funding can be found and existing services are not harmed.

8.A. ACTIVITIES FOR COMPLETION

A.1 SOLID WASTE. Seek to maximize solid waste services for community and build understanding of services like hazardous waste, recycling, etc. and District's role.

Goal 8. ADDITIONAL COMMUNITY SERVICES

8.B. ONGOING ACTIVITIES

B.1 PARK. Remain engaged in community planning at the Board level and communicate District's commitment to follow through with pending acquisition when/if availability of funding source is secured.

B.2 STREET LIGHTING. Monitor maintenance of facilities and respond to observed problems.

B.3 DRAINAGE. Monitor maintenance of facilities and respond to observed problems.

B.4 STREET LANDSCAPING. Monitor landscape maintenance and respond to observed problems.

Conclusions

- We are due for a Strategic Plan update
 - The District accomplished much through the last Strategic Plan
 - New priorities need to be introduced
- New goals need to be considered
- Establish a new format for implementation

OUR MISSION:

The District's mission is to provide our customers with reliable, quality, and cost-effective services now and in the future.

OUR VISION:

Is it open, transparent, and responsive to our customers?

Is it sensitive to rates, cost-efficient, and financially responsible?

Does it support our commitment to maintaining quality facilities and infrastructure?

Does it support our ability to provide quality and reliable services?

Does it support the welfare of our employees?

Does it support the quality of life and rural character of our community?

Core Values:

Is it open, transparent and responsive to our customers?

Is it sensitive to rates, cost-efficient, and financially responsible?

Does it support our commitment to maintaining quality facilities and infrastructure?

Does it support our ability to provide quality and reliable services?

Does it support the welfare of our employees?

Does it support the quality of life and rural character of our community?

Form Two Small Groups – For Shared Perspectives (Adjust for Attendance)

Small Group 1

Phil Henry (Director)

Tom Glover (Director)

Elizabeth Gamez (Staff)

Francisco Maldonado (Staff)

Craig Steele (Staff)

Small Group 2

Ed Eby (Director)

Gary Hansen (Director)

John Joyce (Director)

Raymond Dienzo (Staff)

Jana Eteddgue (Staff)

Build shared perspectives on the District and its issues and challenges today 1/2

To chart a path to the future, the District will need to identify where it stands today -- What is working and what is not working

EACH PERSON: List 3 to 4 aspects of the District to rate. You are making a point with each rating.

Select whatever you believe is helpful to highlight – good or bad.

EACH PERSON Write neatly and concisely on a separate GREEN card (Horizontal)

10 = Excellent

1 = Extremely poor, missing, or incompetent

EACH PERSON Include a few words explaining why you gave it this ranking

Add an "E" if this Enables Success or "C" if it this represents a Challenge

8 Finance E

We have great reserves and solid finances but need better reporting

Build shared perspectives on issues and challenges today 2/2

NOTE TAKER – Ask each person to share their rankings – one at a time or all at once.

NOTE TAKER – Remind everyone of what was said (lay out the cards or by notes).

NOTE TAKER AND GROUP -- Develop a group consensus list of up to 4 ratings to share with the larger group. You are making a point with each rating. What does your group want to share? And why? You can pick among the individual ratings or create new items to rate.

NOTE TAKER, write group ratings on a separate large sheet with category name, and why it was chosen. Write: "Perspectives" at the top of the large sheet.

MEMBERS OF THE BREAKOUT GROUP report on the issues when you come back to the large group. Also, identify which topic it goes with on the main easel boards.

GATHER AND SORT CARDS BY TOPIC AREA and return them to the facilitator

Form Three Small Groups – For Challenges and Opportunities (Adjust for Attendance)

Small Group 1

John Joyce (Director)

Tom Glover (Director)

Raymond Dienzo (Staff)

Francisco Maldonado (Staff)

Craig Steele (Staff)

Group 2:

Phil Henry (Director)

Gary Hansen (Director)

Ed Eby (Director)

Elizabeth Gamez (Staff)

Jana Etteddgue (Staff)

Challenges and opportunities confronting the District in the coming years (1/2)

ALL– Look into the future as far as you can.

Consider the District itself: operations, finance, technology, people, etc. Also, the economy, politics, water supply, and generally the world the District and its customers are operating in.

What are the most critical challenges and opportunities that are already facing us or may face us in the coming years?

If you were king or queen of the District, what are the few (3 or 4) most critical ones that you would require the District to proactively take action on and why?

Write down these issues, challenges or opportunities.

C Planning

After this boom in young families, our community will age. We need to plan for that

Challenges and opportunities confronting the District in the coming years (2/2)

NOTE TAKER – Ask each person to share their challenges.

NOTE TAKER – Remind everyone what was shared.

GROUP – Develop a group consensus list of up to 6 key challenges or opportunities to share with the larger group. What do you want to share? And why?

A) pick among the challenges and opportunities given by individuals, and/or

B) create new items to rate after your discussion.

NOTE TAKER, write out each consensus issue on a separate large sheet with category name, and why it was chosen. Write: “Critical Issues” at top.

MEMBERS OF THE BREAKOUT GROUP report on the issues when you come back to the large group. Also, identify which topic it goes with

GATHER AND SORT CARDS BY TOPIC AREA and return them to the facilitator

Summary of the Interviews

Form Three Small Groups – For Shared Vision (Adjust for Attendance)

Group 1:

Gary Hansen (Director)

John Joyce (Director)

Elizabeth Gamez (Staff)

Francisco Maldonado (Staff)

Raymond Dienzo (Staff)

Small Group 2

Phil Henry (Director)

Tom Glover (Director)

Ed Eby (Director)

Jana Etteddgue (Staff)

Craig Steele (Staff)

Creating a Shared Vision of the Future (1/6)

WHOLE GROUP

The vision articulates what the organization will become at a given time in the future (5 years?).

It should inspire those involved in the District to want to contribute to making it real.

It is the strategic target that, when achieved, fulfills the organization's mission.

As such, it is at the heart of the strategic planning process.

Creating a Shared Vision of the Future: Examples (2/6)

WHOLE GROUP

A world without breast cancer – Susan G. Komen for the Cure

In two decades' time our services will no longer be needed –
Int. literacy program

2000 stores by 2000 – Starbucks (in the mid-1990s)

The end of software – Salesforce.com

We will crush Yamaha – Honda

Creating a Shared Vision of the Future: Example (3/6)

WHOLE GROUP

The District will follow a jointly prepared, commonly understood, and supported Regional Plan for achieving a high degree of water supply and water quality reliability.

The Regional Plan will be developed collaboratively with the member agencies, utilizing the combined resources, facilities, and assets of local water agencies, as well as of some regional agencies. The Plan will provide operational and cost benefits to all the agencies and be funded equitably among them.

Developing and implementing the Regional Water Supply Reliability Plan will permit our service area to successfully meet its water needs in the face of a future prolonged drought and/or a cutback of 20% in imported supplies.

Creating a Helpful Vision Statement (4/6)

INDIVIDUALS

Consider some or all of these questions:

- How do we want to make a difference as an organization?
- What is our vision for our culture?
- What are our most ambitious goals?
- What benefit or impact do we want to have on people and/or the community?
- If the District succeeded in everything it set out to do, how would the community be different?

Pause, think, and then write this out:

- A realistic description of your ideal picture of the District if it becomes as effective as it can be.
- Pick a few elements you most would like to see in the future. Simple bullets are best. Write out what it looks and feels like in the present tense (as if it were already real).
- What benefits or value will our customers, stakeholders, and employees experience?
- How long will it take to achieve?

I would like to collect these: please hand in

Creating a Shared Vision of the Future (5/6)

SMALL GROUP

NOTE TAKER. Ask each person to state their vision elements.

GROUP – Discuss and develop a group consensus list of up to 4-6 key vision elements to share with the large group. What do you want to share? And why? You can

- A. pick among the vision elements given by individuals in your group, and/or
- B. create new vision elements together after your discussion.

**NOTE TAKER: Make a separate page for each of the consensus elements.
Write "Vision" at the top**

MEMBERS OF THE BREAKOUT GROUP report on the issues when you come back to the large group. Also, identify which topic it goes with on the main easel boards. Sort and turn in your individual cards.

Identify Preliminary, Most Important Issues, Challenges, Opportunities, and Priorities from the Day (1/3)

WHOLE GROUP

SUGGEST ANY ISSUES THAT MAY BE MISSING

Please review all the issues and items we have discussed

- Walk through the boards
- Is anything important missing that the District should be ready to deal with

LET'S JOINTLY MAKE A LIST OF CANDIDATE PRIORITY ISSUES

- What are the most critical issues or opportunities we need to tackle or take advantage of in the coming years?


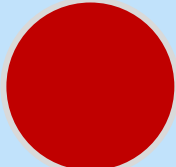
THE FACILITATOR WILL MAKE A LIST

Identify Preliminary, Most Important Issues, Challenges, Opportunities, and Priorities from the Day (2/3)

WHOLE GROUP

Consider the range of issues, challenges, and opportunities facing the District in the coming three to five years.

It is important to focus on just a few priority issues, because it is not possible to accomplish everything at once and there are limits on time, money, and personnel resources. Aim for larger goals and strategic issues.

HOW TO INDICATE YOUR PRIORITIES. You each have 6 votes to indicate the highest priorities: Board Green  and Staff Red 

Be ready to explain why you voted the way you did

We will go around again, giving each person a chance to indicate 2 more votes

What's Next

Final Review, Comment, and Approval at Brd. Mtg.

TBD

Develop Staff Implementation Plan

Spring