



**MEMORANDUM**  
**APRIL 6, 2018**

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**TO:** BOARD OF DIRECTORS

**FROM:** ANDY MUELLER, GENERAL MANAGER  
AUDREY TURNER, ADMINISTRATIVE CHIEF

**SUBJECT:** UPDATE ON STAFF IMPLEMENTATION OF STRATEGIC PLAN

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**ACTION:** *There is no action required on this item at this time.*

**STRATEGIC INITIATIVE(S):** *All*

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In January, your new General Manager proposed an optimistic and aggressive timeline for the staff Strategic Plan implementation process as outlined below:

1. Each staff member will prepare their individual Goals and Objectives Memo for 2018 which will tie each goal back to specific strategic initiatives contained in the Strategic Plan (end of January). *COMPLETE*
2. Senior staff will evaluate, modify if necessary, and approve, process and collate the staff Goals and Objectives in order to identify which of the Strategic Plan initiatives are being addressed and which are not (mid-February). *COMPLETE*
3. Senior staff will develop specific implementation plans for any initiatives which are not being adequately addressed, and evaluate the allocation of District resources being applied to each strategic initiative (mid-March). *IN PROGRESS*
4. The process identified in phase 2 above may also identify significant areas of current District activities which are not addressed by the current iteration of the Strategic Plan (e.g. Enterprise Asset Operation) (early-April). *IN PROGRESS*
5. Staff will prepare and present to Board the results of this process together with a recommendation regarding any potential modification of the Strategic Plan and/or direction with respect to the particular identified activities. (April Board Meeting).
6. Any new projects or requests for staff and/or District resources will be evaluated by the staff using the Strategic Plan as a filter before committing any staff time or other resources (ongoing).
7. All Board memos and staff reports will tie the subject of the memo and request for action to the relevant Strategic Plan initiatives (ongoing).

Steps 1 and 2 of the implementation process are complete: all staff completed their individual Goals and Objectives and Senior Staff met in February to review all Goals and Objectives as they related to the Strategic Plan.

We have encountered a few challenges thus far in this process:

1. Articulating staff Goals and Objectives in the context of the District's Strategic Plan is a new exercise for staff. This first time around, many different approaches were utilized. These varied approaches present challenges to the extrapolation of useful data. We have identified this an opportunity to provide more guidance and set clear expectations as to the format and appropriate level of detail next year and will design and implement training on this issue to assure more uniform results and useable data.
2. Many of staff's Goals and Objectives do not fit neatly into a Strategic Plan initiative, or may not be captured in the Strategic Plan.
3. Ongoing demands of performing the District's work.

After the initial review of staff's Goals and Objectives, we believe that every initiative in the Strategic Plan is being addressed at some level. Further and more in-depth review is warranted to determine what initiatives may deserve more focus and which initiatives may be receiving an over allocation of District Resources. We have compiled and extrapolated the data from the staff goals and objectives, as imperfect as it may be, and created the following chart which illustrates that there is a significant amount of District Resources dedicated to every initiative identified in the Strategic Plan.



A few takeaways from our preliminary analysis:

- Outreach and Advocacy is the most referenced strategic initiative supported by staff Goals and Objectives.
- Water Project Development and Agricultural Water Use are receiving significant attention from the District.
- Enterprise Asset Operation makes up the vast majority of the “other” category and because there is no Enterprise specific Initiative, many of our employees found creative ways to ascribe their Enterprise Asset activities to other Initiatives.
- We believe that to better reflect the allocation of District resources, the Board should consider adopting a specific initiative related to the operation of Enterprise Asset Operations.

Next steps:

1. Senior staff will meet again to conduct an in-depth review of staff’s Goals and Objectives and associated initiatives. Staff will develop specific implementation plans for any initiatives which are not being adequately addressed.
2. Provided we receive Board direction to do so, staff will prepare and present the recommended modification(s) to the Strategic Plan related to Enterprise Asset Operations at the July quarterly meeting.
3. Staff will continue its work in identifying areas where we are expending resources which are not currently identified in the Strategic Plan and bring recommendations to the Board related to that work.
4. Staff will develop a rubric for evaluating new projects or requests and existing projects for staff and/or District resources utilizing the Strategic Plan as a guide.
5. Staff will work on improving the accuracy and consistency in the Staff Goals and Objectives to improve the accuracy and dependability of the data related to the utilization of District resources.