

Crestline Sanitation District
Strategic Plan
2016-2020

Created by the
Staff, Management & Board of Directors



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CSD Strategic Plan 2016

Executive Summary



“To Reclaim Community Resources and Protect our Mountain Community” - Mission Statement

Crestline Sanitation District Staff, Management and Board of Directors’ are committed to, first and foremost the safety of the Community and District Staff, and equally as important complying with all regulatory agency’s inherent to the wastewater industry.

With fiscal year 2016/17 on the horizon, here is a brief progress report as it relates to the “Key Result Area Goals”.

Facilities & Infrastructure; the district is on schedule with the replacement of the existing forty year old equipment alarm monitoring system. To reduce costs, our in-house Instrumentation Specialist is spearheading the upgrade with support from consultants who specialize in SCADA componentry. The goal is to prioritize the most critical monitoring points initially, the district sewage lift stations and the effluent outfall pipeline, are the biggest monitoring concerns for public health and regulatory compliance. Additionally, the district has purchased a 2015 Peterbilt Dump Truck as a replacement to replace a 1984 Mack Dump Truck for necessary safety upgrades. The new truck has built in safety features, and has been equipped with automatic snow chains.

Regulatory Compliance; the district tasked Dudek Inc. to perform a Condition Assessment on the ten mile effluent disposal outfall pipeline, the line is forty-five years old near the end of its design life; results of the study revealed added years of life expectancy to the pipeline.

Professional Development; District protocols place a high priority on staff education regarding the most current job related training coursework while encouraging staff to obtain higher levels of job required state certifications.

Financial Management; the district is in process of updating its Master Plan. The Master Plan will shed light on the current state of all district infrastructure and practical upgrades necessary to secure the future needs of the district.

Customer Service; the district has upgraded its billing software, allowing on-line account access. Additionally, automatic payments are now offered at customer request.

All in all, CSD foresees a positive future for the district, its’ employees and the Crestline community.



Rick Dever, General Manager

Introduction Letter from the Chair

This document represents the Strategic Plan for the Crestline Sanitation District. Participating in the workshops were Management and the Board of Directors with input from all the Staff.

This Strategic Plan presents a collaborative effort and partnership of sharing Mission, Values, Key Results Areas, Goals and a means in which to measure and keep track of these goals. The direction and accomplishments of Crestline Sanitation District are of extreme importance to the Crestline Community. If a plan is not in place one would not know when one reached his destination. It is with full conviction that the Management, Staff and Board of Directors adopt this Strategic Plan and monitor and report on progress throughout the years

As with any Strategic Plan things happen that may cause a deviation from the Strategic Plan. If this is the case, the commitment has been made to readdress the Strategic Plan as it is a working document. The Strategic Plan should be reviewed every year. The goals and results should be reported on every quarter at Board Meetings. The Strategic Plan should be out there for the whole community to review and monitor.

Crestline Sanitation District is relatively new as far as being an independent district. It was felt that this was the perfect time to define the path for us to take to better improve, better manage, and better serve our Staff and our Customers while being fiscally responsible.

It is our hope that everyone who reviews this document understands the importance and sincere obligation it provides for Staff, Management and the Board of Directors and the District's Customers. The Key Result Areas include regulatory compliance, customer service, financial management, facilities & infrastructure and professional development for Staff, Management and the Board of Directors. Within each of these Key Result Areas there have been numerous goals defined with dates and a method to track. This all takes time and energy but all those involved feel it is important and well worth the effort for the continued success of the District.

You will be able to see the process the parties have gone through to get to this point simply by reviewing this document. These well thought out goals will serve as a focal point for programs and policies and ensuring the necessary resources to realize these goals. Goals provide insight to Staff and Customers regarding the direction and philosophy of the District.

This Strategic Plan also proves a strong commitment to self-assessment, continuous improvement and comprehensive planning. This Plan also identifies the external forces that influence decision making and have impact on the District.

I am proud to present the Crestline Sanitation District's Strategic Plan.

Matthew Philippe, Chairman of the Board of Directors

A handwritten signature in black ink, reading "Matthew Philippe". The signature is written in a cursive, flowing style. Below the signature, there are two small vertical lines "||".

The Strategic Planning Process



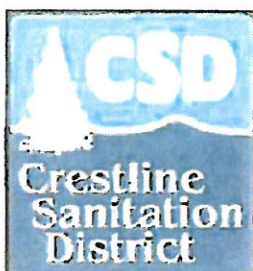
The Crestline Sanitation District has been Independent since 2010. The first 3 years were spent in taking care of items that would need to be addressed with any new District. Resolutions and Ordinances etc. were needed. Fiscal accountability was necessary as well as legal matters. Having accomplished these, it seemed to be a perfect time to start looking forward into the next years for strategic planning for scheduling upgrades and improvements for the District. The transition to Independence has been successful thanks to all working at the District.

Hence, the Crestline Sanitation District. Board of Directors agreed to develop a strategic plan. In May of 2012, we held interviews with each of the Board Members and Management. An important finding was that the Board had no previous experience participating on a public agency board and the staff had no previous experience working with a public agency board. From these findings it was recommended that the Management and the Board participate in workshops.

In the 2015 and 2016 workshops were held with the entire Staff of CSD. Each workshop was at a minimum of 3 hours in length. The results of all these workshops are included in this document. Items given very specific focuses were identifying CSD's Core Services and their Secondary Services. The District's priorities were identified which guided the Strategic Plan.

In addition, key stakeholders were identified as: customers, competitors, regulators and resources. Each of these offered either a threat or an opportunity to the District. These are all variables that the workshops focused on heavily. There were many threats and opportunities identified in the future marketplace.

Based on the above information, goals were then identified along with a means of measuring outcomes of each goal with identifying dates of completion and persons responsible. The work output of these workshops was then presented to all the Staff for their input in a separate workshop. They had many good ideas that have been incorporated into this Strategic Plan.



Mission

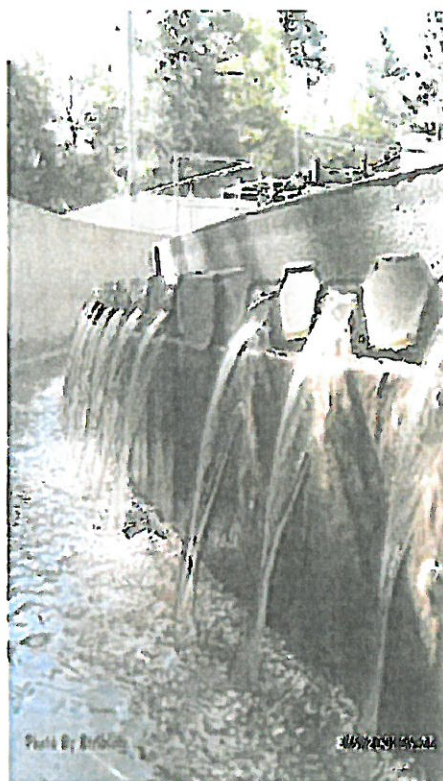
"To reclaim community resources and protect our mountain environment"

Values

- Health and Safety above all else
- Uncompromising customer service
- Integrity
- Respect for all

Key Result Areas

- Regulatory compliance
- Customer Service
- Financial Management
- Facilities & Infrastructure
- Professional development



Goals

Goals have been created by the District to support the Key Result Areas. These are detailed later in this document. Goals will be monitored and measured quarterly by the Staff, Management and Board of Directors.

Measurements

A scoreboard approach will be used to monitor and track goals using an internal document. Goals not tracked are goals not made. Staff, Management and the Board of Directors have committed to this process.

History of the District

Crestline Sanitation District (CSD) was formed on January 16, 1947 under Section 4700 of the State Health & Safety Code to provide sewer services to the Lake Gregory area of the San Bernardino Mountains. Crestline Sanitation District is the largest enterprise Sanitation District in San Bernardino County of California. The District was managed by the County Special Districts. In November of 2008, a Measure R was put on the ballot for voters to decide whether to stay with Special Districts or to move Crestline toward an independently run district.

Measure R, if favorable, also allowed for a 5-person Governance Commission to be created. Measure R was voted by the populous of Crestline with an approximate 83% return in favor.

This Commission worked for many months doing research and investigation of operations, budgets, personnel structure etc. and in September of 2009, the recommendation of the Governance Commission to the San Bernardino County Board of Supervisors was to go Independent. The Board of Supervisors voted to accept the recommendation. The Governance Commission having completed their task, dissolved.

Measure S followed with an election to have the community select 5 members to serve on the Crestline Sanitation District's newly formed Board of Directors. effective October 2010. The Crestline Sanitation District has been independently run ever since.

The District presently has 5,336 equivalent dwelling units (EDUs), commercial and residential connections. The existing facilities have the potential to serve 6,500 connections.

Approximately one-third of the District area is sewerred. The unsewerred area is comprised of subdivided tracts, government land and large undeveloped parcels. In these areas subsurface disposal systems (septic tanks) are used for sewage treatment and disposal, as permitted under the original Sanitation agreement.

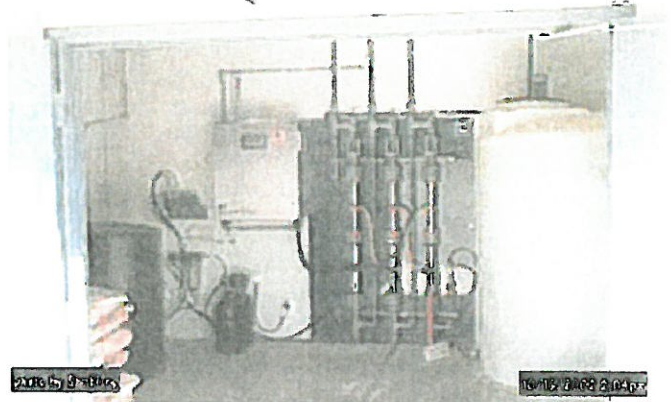
In recent years, the District has increased in area and facilities. Current District boundaries run east from Saw Pit Canyon to Twin Peaks and north from Rim of the World (Highway 18) to Mile high Park, approximately 23,000 acres. The District operates and maintains three treatment plants, 90 miles of collection system, a 14-mile effluent outfall line and an effluent disposal site on Las Floras Ranch in Summit Valley. Waste solids after processing are hauled by the District to a composting facility in Redlands.

Crestline Sanitation District has decreased its overhead and has been able to set aside reserves for its required future growth. The community of Crestline should be proud of the accomplishments and vision of the Crestline Sanitation District's employees.

Accomplishments - Since Independence



Facility and Infrastructure



Regulatory Compliance

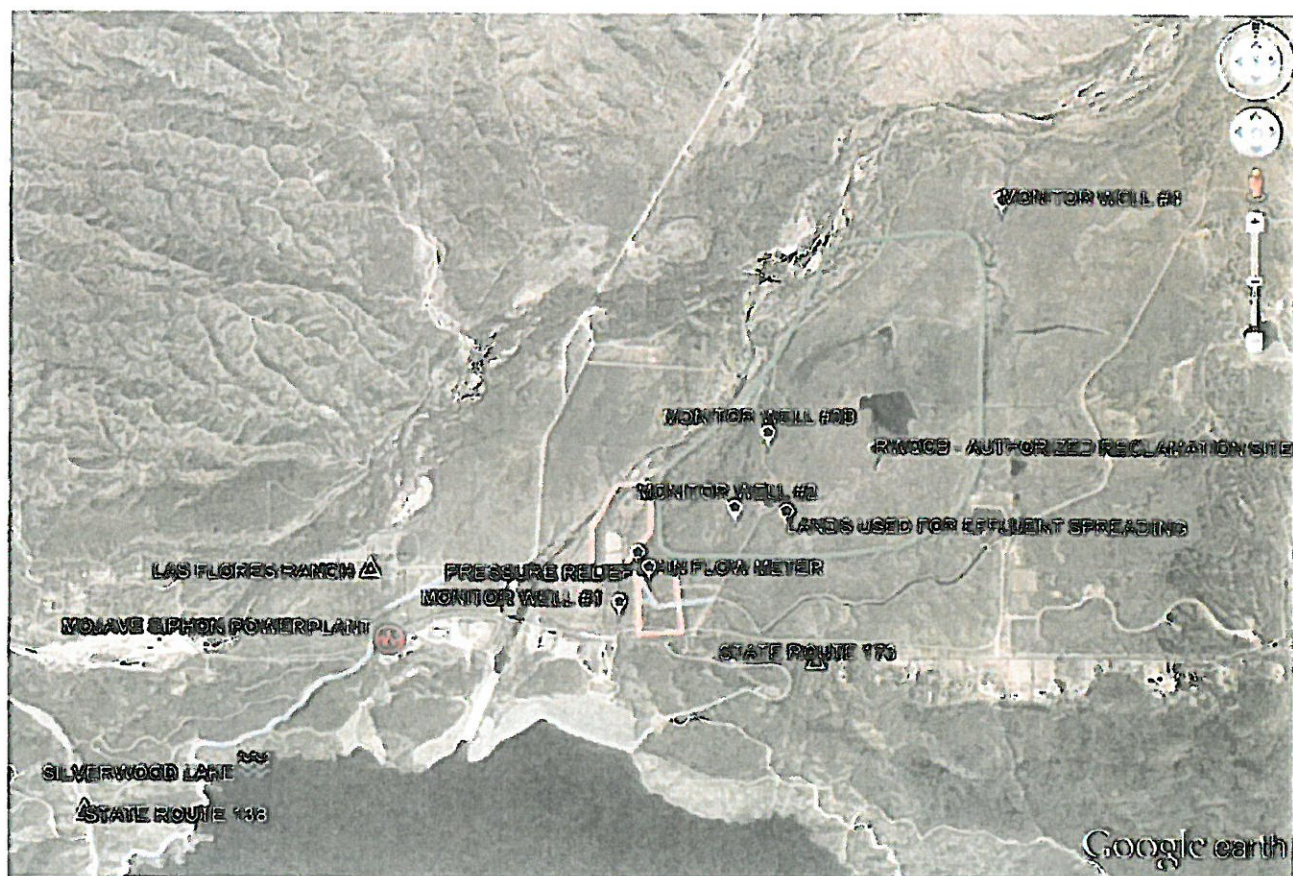


Professional Development

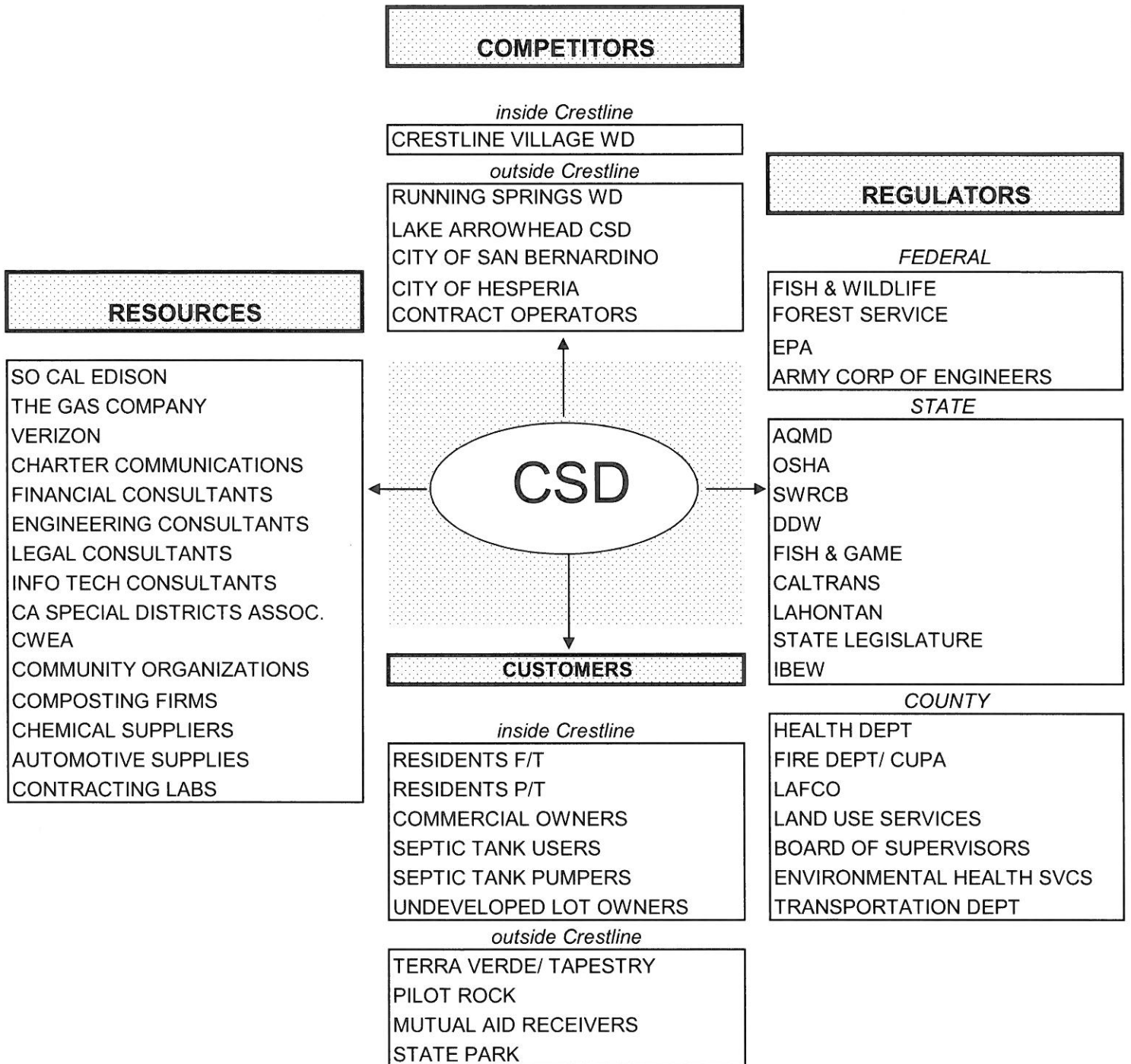


Financial Management

Effluent Disposal Site



KEY STAKEHOLDERS WHO COULD INFLUENCE OUR FUTURE



CSD's 26 Goals

KEY RESULTS AREAS / GOALS		DATE	% DONE
REGULATORY COMPLIANCE			
1	Maintain 100% regulatory compliance, annually	Ongoing	100%
2	Maintain 100% Regulatory Compliance with RWQCB Requirements for Plant Discharge, Annually	Ongoing	100%
3	Achieve < 2 SSOs per Year, Annually	Ongoing	100%
4	Secure Long Term Effluent Discharge Compliance	Jul-16	75%
5	Maintain >Grade III Operators	Ongoing	50%
CUSTOMER SERVICE			
1	Maintain< 1% Customer Complaints about Service, Quarterly	Ongoing	100%
2	Expand On-line Bill Paying to 30% of District Customers	Jul-17	70%
3	Maintain Zero Service Interruptions, Monthly	Ongoing	100%
FINANCIAL MANAGEMENT			
1	Marketing of Reclaimed Water	Jul-17	25%
2	Maintain Actual Expenditures +- 5% of District Budget, Annually	Ongoing	100%
3	Reach 100% O & M Reserves Levels	Ongoing	75%
4	Ensure that Rate Payers Cover 100% the Cost of Service	Jul-20	25%
5	Build CIP Reserves to Fund All Perspective Projects	Ongoing	25%
FACILITIES & INFRASTRUCTURE			
1	Implement Point-in-Time Data Recovery	Ongoing	90%
2	Maintain Zero Discharge Violations due to Equipment Failure, Quarterly	Ongoing	100%
3	Management of Infiltration & Inflow	Ongoing	20%
4	Maintain the Integrity of the Outfall Line	Ongoing	100%
5	Complete Facilities Master Plan	Jul-18	25%
PROFESSIONAL DEVELOPMENT			
1	Maintain Competitive Employee Compensation and Benefits	Ongoing	100%
2	Ensure that all Board Members Expand Knowledge of Small Utility Governance	Ongoing	100%
3	Ensure that all Staff Positions have In-House Replacements	Ongoing	80%
4	Maintain 100% Staff Participation in Annual Development Program	Ongoing	100%
5	Maintain Zero Time Lost due to Accidents per Year	Ongoing	100%

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REGULATORY COMPLIANCE

GOAL	DATE
Maintain 100% Regulatory Compliance, Annually	Ongoing

ACTIONS	DATE	R
Regulatory Compliance Data Base Established	Ongoing	GM
Annual Review of District Emergency Plan	Annually	GM
MOU for Interagency Coordination for Emergencies	Ongoing	GM

GOAL	DATE
Maintain 100% Compliance with RWQCB Requirements for Plant Discharge, Annually	Ongoing

ACTIONS	DATE	R
Annual RWQCB Compliance Report	Annually	GM
Labor Analysis for each Treatment Process	Ongoing	GM

GOAL	DATE
Achieve <2 SSO's per Year, Annually	Ongoing

ACTIONS	DATE	R
Annual Review of District SSMP	Ongoing	OM
5 Year SSMP Update	June 2020	OM
Completion of 15 Miles of Pipeline per Year	Ongoing	OM
Budget for Appropriate Staff	Annually	GM

GOAL	DATE
Secure Long Term Effluent Discharge Compliance	Jun-20

ACTIONS	DATE
Completion of Master Plan	June-18
Track Legal Procedures regarding Mojave River Basin	Ongoing

GOAL	DATE
Maintain \geq Grade III Operators	Ongoing

ACTIONS	DATE
On-going Off Site Training for Grade III Operators	Ongoing
Encourage Higher Certification	Ongoing

CUSTOMER SERVICE

GOAL	DATE
Maintain <1% Customer Complaints about Service, Quarterly	Ongoing

GOAL	DATE
Maintain Zero Service Interruptions	Monthly

ACTIONS	DATE	R
On-going Tracking of Customer Complaints	Daily	ADM
Promotional Mailings about CSD Projects	As needed	ADM
Monthly Tours for the Public	Monthly	ADM

ACTIONS	DATE	R
Adherence to Preventive Maintenance Schedule	Ongoing	ADM
Semi-annual Test of UPS	Ongoing	ADM
Monthly Test of Generators Stand by Power	Monthly	ADM

GOAL	DATE
Expand On-line Billing to 30% of District Customers	Jul 2017

ACTIONS	DATE	R
On-going Review of Cost & Benefits	Quarterly	ADM
Communicate On-line Bill Pay to the Customer Base	Daily	ADM

FINANCIAL MANAGEMENT

GOAL

DATE

Marketing of Reclaimed Water	Jul-17
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ACTIONS

DATE

R

Business Plan	Jan-17	GM
Title 22 Engineering Report	Jul-16	GM
Legal Analysis of CSD Water Rights	Ongoing	GM

GOAL

DATE

Ensure Rate Payers Cover 100% Cost of Service	Jul -20
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ACTIONS

DATE

R

Public Workshops	Ongoing	GM
Board Approval of Possible Rate Increases	Annually	BD
Implementation of Rate Adjustment	As Approved	ADM

GOAL

DATE

Maintain Actual Expenditures \pm 5% of District Budget, Annually	Ongoing
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ACTIONS

DATE

R

Monthly Reports on Purchases	Ongoing	ADM
Annual CIP Budget Review	Annually	GM
Annual Salary Budget Review	Annually	GM

GOAL

DATE

Build CIP Reserves to Fund all Perspective Projects	Ongoing
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ACTIONS

DATE

R

218 Process Review	Annually	BD
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GOAL

DATE

Reach 100% O & M Reserves Levels	Ongoing
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ACTIONS

DATE

R

Annual Review of Board Reserve Policy	Ongoing	BD
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CSD Strategic Plan 2016

FACILITIES & INFRASTRUCTURE

GOAL	DATE
Implement Point-in-Time Data Recovery	Ongoing

ACTIONS	DATE	R
Back-up on a Timely Basis	Ongoing	AD
Emergency Preparation	Annually (Oct)	OM

GOAL	DATE
Maintain Zero Discharge Violations due to Equipment Failure, Quarterly	Ongoing

ACTIONS	DATE	R
Maintain Stock of Critical Equipment	As needed	OM
Annual Zero Discharge Violation Operational Review	Annually	OM
Maintenance of Critical Equipment	As needed	OM

GOAL	DATE
Management of Infiltration & Inflow (I & I)	Ongoing

ACTIONS	DATE	R
Aggressive Slip-Lining	Annually	OM
Manhole Rehabilitation	Annually	OM
Smoke Testing	Ongoing	OM

GOAL	DATE
Maintain the Integrity of the Outfall Line	Ongoing

ACTIONS	DATE	R
Integration of Outfall Line Findings into CSD Master Plan	Jul-18	GM
Re-Evaluation of the Outfall Line Condition Assessment	June 2030	GM

GOAL	DATE
Clean & Televis 100% of Collection System, as Required by the SSMP	Ongoing

ACTIONS	DATE	R
Budget for Necessary Repairs & Maintenance of Equipment to Clean & Televis	Annually	GM
Budget for Appropriate Staffing	Annually	GM

GOAL	DATE
Complete Facilities Master Plan	Jul-18

ACTIONS	DATE	R
Completion of Facilities Inspection	Jul-17	GM
Draft Master Plan Report to the Board	Jul-17	GM
Board Approval Master Plan	Jul-18	BD

PROFESSIONAL DEVELOPMENT

GOAL	DATE
Maintain Competitive Employee Compensation and Benefits	Ongoing

ACTIONS	DATE	R
Annual Review of Benefits	Oct 2016	GM
Compensation Recommendations to Board	Apr 2019	GM

GOAL	DATE
Ensure that All Board Members Expand Knowledge of Small Utility Governance	Ongoing

ACTIONS	DATE	R
Quarterly Board Workshops	Ongoing	BD
Two CSDA Training Sessions	Ongoing	BD
One WWTP Tour	Ongoing	BD
Legislative Monitoring	Ongoing	BD

GOAL	DATE
Ensure that All Staff Positions have In-house Replacements	Ongoing

ACTIONS	DATE	R
Training of Staff	Ongoing	GM
Mentoring of Staff	Ongoing	GM

GOAL	DATE
Maintain 100% Staff Participation in Annual Development Program	Ongoing

ACTIONS	DATE	R
Staff Participation in CWEA Certificate Programs	Ongoing	GM
Staff Training on Disaster, Safety, and Customer Service	Ongoing	OM

GOAL	DATE
Maintain Zero Time Lost due to Accidents per Year	Ongoing

ACTIONS	DATE	R
Monthly Safety Committee Meetings	Ongoing	OM
Monthly Inspections for Risk and/or Potential Safety Violations	Ongoing	OM
Report on MOD Rate	Annually	GM
Incentives for Zero Incidents	Ongoing	GM