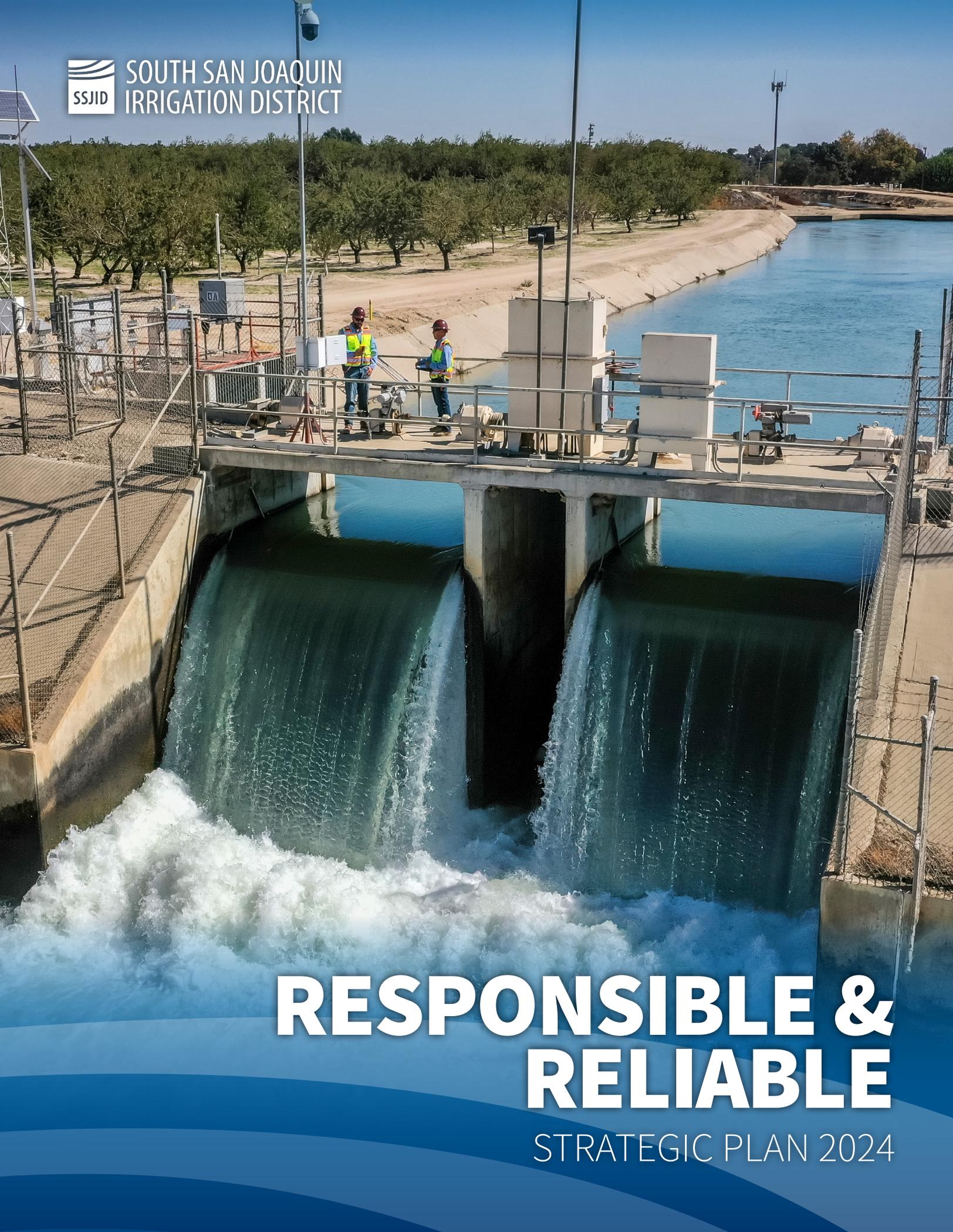


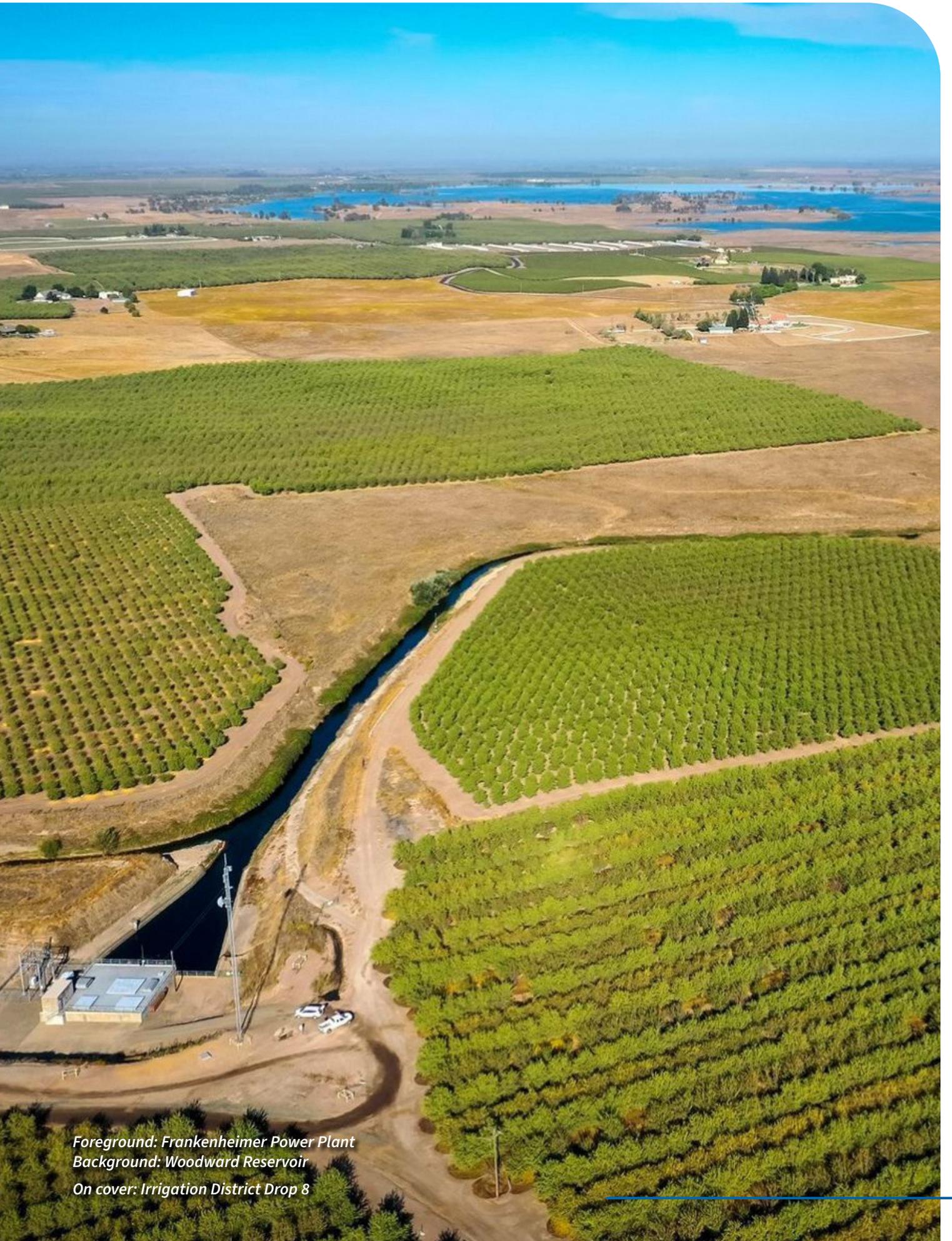


SOUTH SAN JOAQUIN
IRRIGATION DISTRICT



RESPONSIBLE & RELIABLE

STRATEGIC PLAN 2024



*Foreground: Frankenheimer Power Plant
Background: Woodward Reservoir*

On cover: Irrigation District Drop 8



Letter from the Chair/Board

SSJID Landowners, Customers, and Constituents:

This Board of Directors, serving as stewards of SSJID, respectfully presents to you the 2024 Strategic Plan. Launched 7 years ago, the 2017 Strategic Plan served as a foundation for SSJID's continued progress to deliver reliable irrigation water and treated drinking water with exceptional customer service. The 2024 Strategic Plan builds upon on SSJID's work over the last 7-years and will now serve as SSJID's roadmap to continuous and sustained improvement.

The focus of the 2024 Strategic Plan includes proactively implementing infrastructure initiatives contained in the District's Water Master Plan, actively pursuing a financially stable business model, and thoughtfully developing effective employee retention and training programs. These 2024 Strategic Plan priorities are essential to ensuring that SSJID remains an organization that is valued and trusted by the communities we serve.

On behalf of the Board of Directors and SSJID's dedicated staff, we are excited and eager to get to work on our strategic priorities.



President
Michael Weststeyn



Vice President
Glenn Spyksma



Director
John Holbrook



Director
David Kamper



Director
David Roos



Irrigation District Drop Number 12

Executive Summary

The purpose of the 2024 Strategic Plan is to clearly articulate the District's Strategic Priorities over the next five years. The District is committed to continued and sustained improvement in its abilities to protect and deliver vital resources with exceptional service to its agricultural, urban, and business communities.

The District has further specified goals for each Strategic Priority, including how to accomplish these goals, and how the District will measure success.

2024 STRATEGIC PRIORITIES INCLUDE:



Water Supply, Infrastructure, Treatment, and Distribution: The District will deliver significant value to the region by: (i) protecting its senior water rights, (ii) managing a sustainable balance of surface water and groundwater, and (iii) enhancing reliability, operational efficiency, and flexibility.



Finance and Rates: The District will judiciously manage its financial resources: (i) to meet the District's Mission, (ii) to achieve the District's Strategic Priorities, and (iii) to maintain rates that are fair, competitive, and financially sustainable.



Workforce and Culture: The District will ensure its workforce is appropriately sized and organized to carry out the District's Mission and is comprised of team members who are highly engaged and passionate.



Customer and Community Relations: The District will actively strive to meet the needs of our customers and our community, who are the foundation of the District.



Legislative and Regulatory: The District will actively monitor state, federal and local legislative and regulatory issues, and advocate to protect the interests of our customers and our community.



Retail Electric: The District will implement an operating strategy for the electric utility to satisfy the legal prerequisites for starting the electric utility and to transition to a fully functional electric utility that keeps the promises we made to our community including:

- Rates that are at least 15% below PG&E's.
- No subsidy by the electric ratepayers of the water ratepayers, and vice-versa.
- Local control of the utility through an accountable and transparent Board of Directors and management.
- High standards of service reliability.
- A utility that reflects local values.

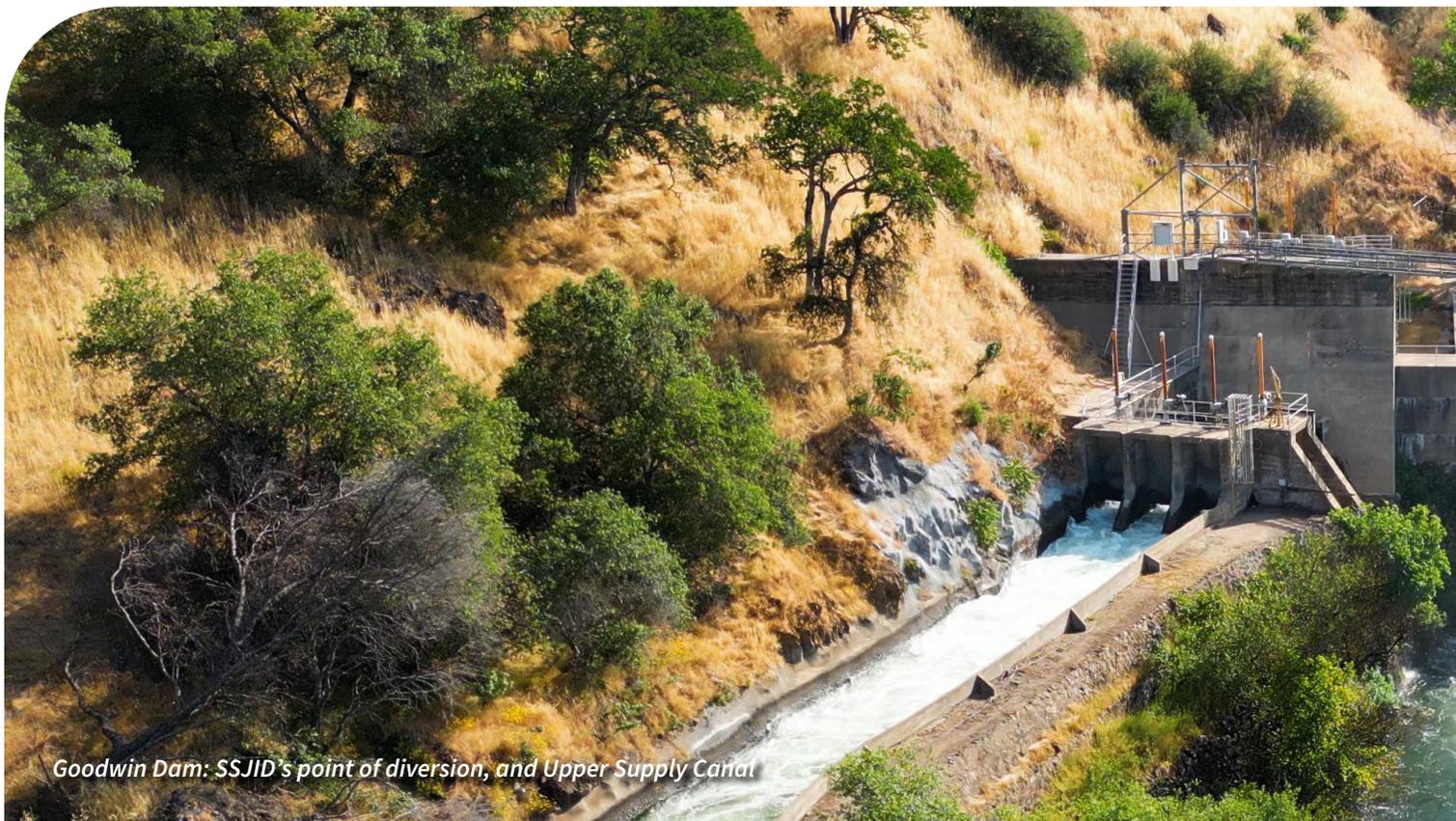
Introduction

Nearly 115 years ago, local citizens, farmers, engineers, and entrepreneurs of the soon-to-be South San Joaquin Irrigation District (SSJID) secured an opportunity to purchase water rights, transport, store, and deliver water to the greater Manteca, Ripon, and Escalon areas. The first true irrigation season under the charge of SSJID occurred in the spring of 1914 when cultivated land in the District totaled 15,600 acres. By 1918, irrigated farmland soared to 51,096 acres, a remarkable 328% increase in a short five-year period. It was the vision, foresight, and strategic planning of these early founders that would bring “liquid-gold” to the dry lands of the valley floor.

The formation of SSJID brought prosperity to the region and forever changed the fate of the southern portion of San Joaquin County.

In 1913, the Irrigation District Bond Commission was tasked with approving bonds authorized by South San Joaquin Irrigation District to support ultimate buildout of its diversion and distribution system. This approval process involved a rigorous review of the District’s engineering plans and water supply availability projections meticulously presented in support of the District’s future vision. The 1913 report from the Irrigation District Bond Commission included the following observation:

It is safe to say that in but few, if any, public or private irrigation enterprises of large size has the engineering study and work been so thoroughly done, and the plans formulated upon such complete engineering data as has the project of the South San Joaquin Irrigation District..... it may be assured that the ultimate smooth working of the whole will be demonstration of the wisdom of building upon well-digested plans.



Goodwin Dam: SSJID’s point of diversion, and Upper Supply Canal



Through thoughtful planning, innovation, and execution, the vision of the District’s founders had come to fruition and transformed the local area through irrigated agriculture. The District continues to support the economic growth of our region and is a pillar of strength for the community it serves. This legacy of innovation, starting with the irrigation canals and ditches, Woodward Reservoir, and the Tri-Dam Project, had progressed into the South County Water Supply Project and the Division 9 Irrigation Enhancement Project. Many things have changed since 1909, but the purpose and importance of SSJID to bring water to the community remains the same today. SSJID’s commitment to excellence remains as strong as ever.

The District must continue to meet the challenges of the ever-changing political, regulatory, and natural realities of water in California. The District recognizes that opportunities to modernize, innovate, and adapt are critical to ensuring continued fulfilment of the District’s mission. Technology is making data and automation easier to acquire and incorporate into daily operations, providing SSJID opportunities to develop further efficiencies and to track and measure progress.

Threats to the District’s water rights, some of which originated in the mid-1800’s, have grown more voracious over the years. The Sustainable Groundwater Management Act is being implemented statewide and will require extraordinary coordination among multiple agencies at the groundwater subbasin level and the successful implementation of groundwater recharge projects. Regulations on several fronts are increasing operational complexity. The District must find a way to navigate these challenges by enlisting the same type of thorough, forward-thinking planning that our original founders began in 1909 and has propelled the District into the modern era.

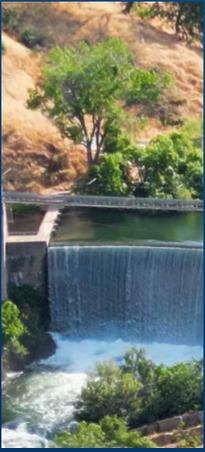
This Strategic Plan provides Strategic Priorities and goals that will serve as a roadmap for the District and be implemented over a five-year horizon. The core purpose of the 2024 Strategic Plan is to provide alignment, direction, consistency, and clarity for SSJID’s Board of Directors and its employees, and also to provide accountability to the communities we serve.





Mission

SSJID provides the utmost value for its agricultural, urban, and business community by protecting and delivering vital resources with exceptional service.



Vision

SSJID delivers high quality water and reliable power to the communities we serve. We lead in innovation and respect our history, our employees and our environment.



Values

The District's 10 core values:



Accountability



Integrity



Teamwork



Excellence



Positivity



Transparency



Health and Safety



Respect



Innovation



Service

Official District Motto: Be Safe, Work Hard, and Be Kind



2024 Strategic Plan Process

The District initiated its first strategic planning effort in 2016 to develop a well-defined mission statement, aspirational vision statement, and organizational values. The District endeavored to define the major priorities for the District and the underlying goals that would guide the District through implementation of selected key initiatives. The 2017 Strategic Plan identified six strategic areas of focus including: i) Finance and Rates, ii) Workforce and Culture, iii) Customer Service and Community Relations, iv) Water Supply, Operations and Distribution, v) Retail Electric and vi) Legislative and Regulatory. It provided a clear set of goals for each of these areas and formed the basis for an implementation program from 2017 to 2021.

Following adoption of the 2017 Strategic Plan, District staff successfully implemented numerous initiatives to carry out the strategic plan goals. Examples of these initiatives include development of processes to improve internal and external communications; updating finance policies; implementing alternative work schedules; and development of a long-range capital and financial plan for SSJID's irrigation services, now known as SSJID's Water Master Plan.

The District's 2024 Strategic Plan sets the stage for the implementation of new initiatives and Strategic Priorities over the next five years.

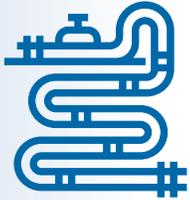
The 2024 Strategic Plan was developed with input across the organization and includes a fresh look at current circumstances, challenges, and opportunities. The 2024 Strategic Plan process took the lessons learned, and infused fresh ideas, culminating into a list of traditional and innovative strategies and initiatives that when implemented, will produce measurable improvements in the delivery of services to the communities we serve and to SSJID's valued team members.

The 2024 Strategic Plan involved extensive interviews and input from the staff, senior leaders, and the Board of Directors. The District conducted two full-day workshops along with one-on-one feedback across all parts of the organization identifying how the District can build on or improve on its past success and set the direction for the next generation of SSJID team members. The public was also provided an opportunity to comment on the plan during a Board of Directors meeting. The 2024 Strategic Plan has truly been a collaborative and deliberate effort to reflect the values and priorities of SSJID as an organization and the communities we serve.



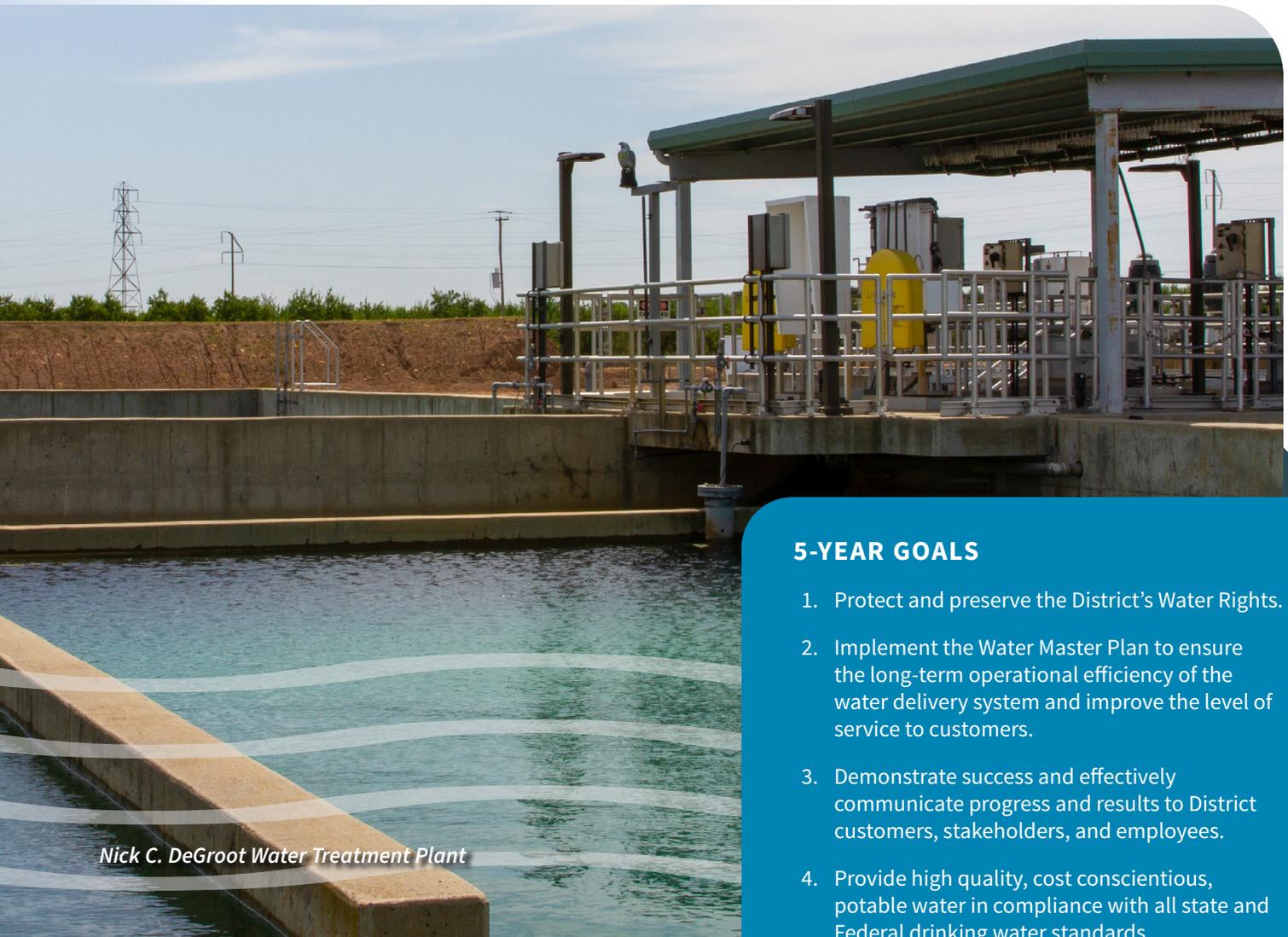
THE 2024 STRATEGIC PLAN IDENTIFIES THE FOLLOWING AREAS OF FOCUS AND STRATEGIC PRIORITIES:

Water Supply, Infrastructure, Treatment and Distribution



STRATEGIC PRIORITY:

The District will deliver significant value to the region by: (i) protecting its senior water rights, (ii) managing a sustainable balance of surface water and groundwater, and (iii) enhancing reliability, operational efficiency, and flexibility.



Nick C. DeGroot Water Treatment Plant

5-YEAR GOALS

1. Protect and preserve the District's Water Rights.
2. Implement the Water Master Plan to ensure the long-term operational efficiency of the water delivery system and improve the level of service to customers.
3. Demonstrate success and effectively communicate progress and results to District customers, stakeholders, and employees.
4. Provide high quality, cost conscientious, potable water in compliance with all state and Federal drinking water standards.

GOAL 1.0:

Protect and preserve the District's Water Rights.

- 1.1 – Actively oppose proposed changes to water law and administrative actions that may adversely impact the District's surface water and groundwater supplies.
 - 1.2 – Protect both surface water and groundwater resources available to the District.
 - 1.3 – Develop, foster, and maintain relationships as a trusted leader in water management.
 - 1.4 – Work across SSJID departments to improve data measurement and collection.
-

GOAL 2.0:

Implement the Water Master Plan and ensure the long-term operational efficiency of the water delivery system.

- 2.1 – Update major components of WMP every 5 years, including projects, implementation pace, and financial results.
 - 2.2 – Continue to review and refine workflow process and protocols to streamline the delivery of projects and services.
 - 2.3 – Develop a 5-year pipeline rehabilitation plan that identifies annual targets for linear feet of pipeline rehabilitation, funding, and targeted cost savings.
 - 2.4 – Develop a 5-year plan for Water Information System (WIS).
 - 2.5 – Develop, refine, and implement SCADA Master Plan that drives improvement and efficiency.
 - 2.6 – Investigate Computerized Maintenance Management System (CMMS) applicability and strategies for the District.
 - 2.7 – Work persistently to reduce irrigation water loss through a combination of conservation, automation and customer education.
-

GOAL 3.0:

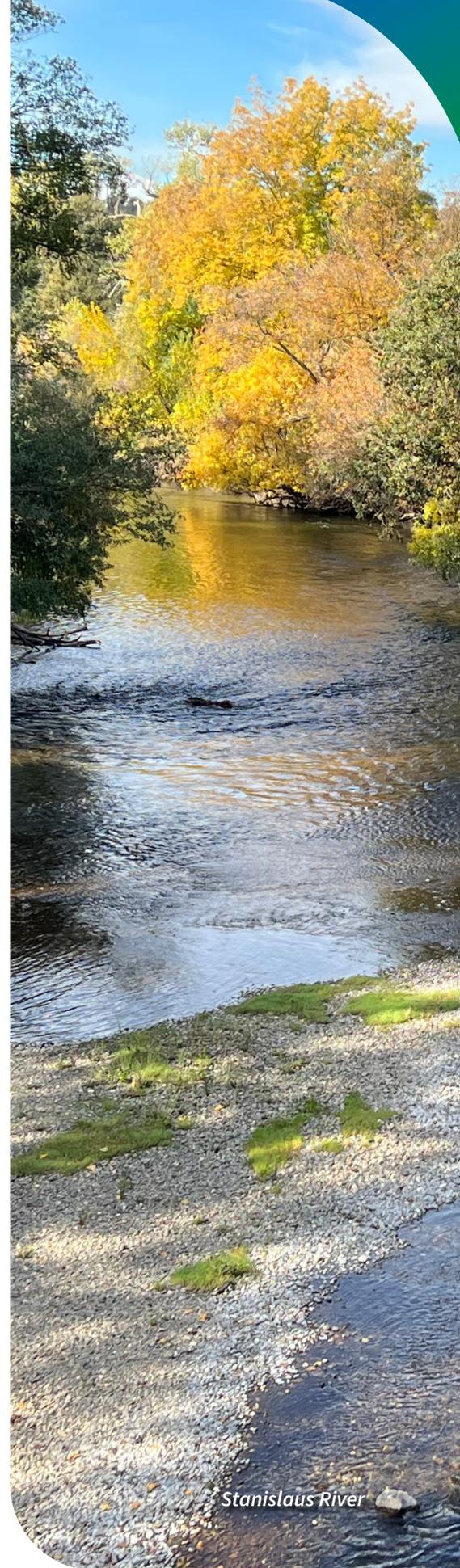
Demonstrate success and effectively communicate progress and results to the District, stakeholders, and customers.

- 3.1 – Develop and implement a method/tool to track, measure, and regularly report on WMP implementation progress.
-

GOAL 4.0:

Provide high quality, cost conscientious, potable water in compliance with all state and Federal drinking water standards.

- 4.1 – Implement Water Treatment Plant (WTP) projects to reduce risk, increase efficiency, and address broader issues like disinfection byproducts.
- 4.2 – Develop 5-year plan to assess feasibility, cost, timing, and implications of potential phase 2 expansion in accordance with forecasted needs.



Stanislaus River

Finance and Rates



STRATEGIC PRIORITY:

The District will judiciously manage its financial resources: (i) to meet the District's Mission, (ii) to achieve the District's Strategic Priorities, and (iii) to maintain rates that are fair, competitive, and financially sustainable.



Water Master Plan Grower Meeting 2022

5-YEAR GOALS

1. Establish and maintain rates that are fair, reasonable, and financially sustainable.
2. Evaluate, update, and modernize all District fees, and charges for services.
3. Maintain financial reserves to adequately moderate risks, supply foreseeable cash needs, and protect the District's bond ratings.
4. Maintain and optimize efficient financial accounting, monitoring, and budgeting practices.
5. Develop Capital funding strategy.
6. Enhance Enterprise Resource Planning.



Control Room Facilities and Operations
Van Groningen Reservoir

GOAL 1.0:
Establish and maintain rates that are fair, reasonable, and financially sustainable.

- 1.1 – Build, refine, and implement a long-term financially sustainable business model.
- 1.2 – Perform cost of service studies, as necessary, to determine the next 5-year rate revenue needs.
- 1.3 – Implement 5-year irrigation rate plan to support Water Master Plan and District financial needs.

GOAL 2.0:
Evaluate, update, and modernize all District fees, and charges for services.

- 2.1 – Overall evaluation all District fees and charges for services, including well rentals, development plan review, construction permitting and administration fees.
- 2.2 – Evaluate raw water rate for Cities receiving water from the WTP.
- 2.3 – Periodic update of fees and charges as necessary.

GOAL 3.0:
Maintain reserves to adequately moderate financial risks, supply foreseeable cash needs, and protect bond ratings.

- 3.1 – Review and update reserve policy as necessary for operations and capital.
- 3.2 – Cashflow forecast for District liquidity and investments.

GOAL 4.0:
Maintain and optimize efficient financial accounting, monitoring, and budgeting practices.

- 4.1 – Development of periodic reports and dashboards of financial performance that identifies, reports, and communicates key financial metrics for decision making.
- 4.2 – Continuously evaluate and adjust financial accounting and budgeting practices to improve efficiency, tracking, timeliness, and service.
- 4.3 – Implement necessary steps to maintain clean audit findings.

GOAL 5.0:
Develop Capital funding strategy.

- 5.1 – Develop a 5-year and longer-term Capital Funding Strategy for capital projects.

GOAL 6.0:
Enhance Enterprise Resource Planning.

- 6.1 – Development of District-wide Enterprise Resource Planning (ERP) strategy.

Workforce and Culture



STRATEGIC PRIORITY:

The District will ensure its workforce is appropriately sized and organized to carry out the District's Mission and is comprised of team members who are highly engaged and passionate.



SSJID Team members along the shore of Goodwin Reservoir for winter construction

5-YEAR GOALS

1. Maintain an effectively sized and structured workforce.
2. Promote understanding, professional growth, and the development of our employees.
3. Improve process of evaluating team member performance.



SSJID Staff at the DeGroot Water Treatment Plant

GOAL 1.0:

Maintain an effectively sized and structured workforce.

- 1.1 – Develop recommended staffing and resources plan necessary to maximize efficiency of District operations.
- 1.2 – Development and communication of a Workforce Strategy Plan, including employee engagement, recruitment, and succession planning.

GOAL 2.0:

Promote understanding, professional growth, and development of our employees.

- 2.1 – Annual Employee Town Hall regarding the performance and priorities of the District.
- 2.2 – Improve Human Resources and Benefits information accessibility for employees.
- 2.3 – Consolidate and update employment policies into an Employee Handbook and host a refresher training course for existing employees.
- 2.4 – Develop and implement internal training programs/user groups for financial systems, policies and procedures.
- 2.5 – Develop employee volunteer incentive programs and foster opportunities for employee engagement in the community.
- 2.6 – Completion and communication of at least 2 employee surveys over the next 5 years, evaluating employee satisfaction, and/or engagement specific to critical departments (irrigation, WTP, and retail electric).

GOAL 3.0:

Improve process of evaluating team member performance.

- 3.1 – Create a simplified and effective District-wide performance review form/process to be used annually by all supervisors.

Customer and Community Relations



STRATEGIC PRIORITY:

The District will actively strive to meet the needs of our customers and our community, who are the foundation of the District.



5-YEAR GOALS

1. Enhance engagement and brand awareness within the community and region.
2. Measure and improve customer satisfaction.
3. Develop regional partnerships to advance mutual organizational goals and outcomes.

SSJID Volunteers come in all sizes!



Almond Orchard in Bloom

GOAL 1.0:

Enhance engagement and brand awareness within the community and region.

- 1.1 – Develop and implement a public relations strategy to highlight key accomplishments of the District.
-

GOAL 2.0:

Measure and improve customer satisfaction.

- 2.1 – Monitoring and evaluation of customer inquiries.
 - 2.2 – Develop customer survey(s) over the next 5 years, evaluating customer satisfaction, critical business functions and delivery, and awareness of SSJID services, projects, and accomplishments.
 - 2.3 – Develop customer service training modules for employees.
-

GOAL 3.0:

Develop regional partnerships to advance mutual organizational goals and outcomes.

- 3.1 – Work closely with other public agencies, including our sister agency Oakdale Irrigation District, the local cities and agencies within and adjacent to SSJID’s boundaries, participating cities in the South County Water Supply Program, Groundwater Sustainability Agencies within the Eastern San Joaquin Groundwater Authority, regional public and government agencies, and appropriate state and federal agencies to support and advance the delivery of the District’s mission and strategic priorities.
- 3.2 – Build strategic alliances, coalitions, and partnerships with agencies with similar issues, goals, and objectives to support the District’s mission, interests, and policy objectives.
- 3.3 – Actively seek leadership roles and participate in community and industry events and non-governmental organizations to support the District’s mission, interests, and policy objectives.

Legislative and Regulatory



STRATEGIC PRIORITY:

The District will actively monitor state, federal, and local legislative and regulatory issues, and advocate to protect the interests of our customers and our community.

5-YEAR GOALS

1. Proactively and strategically implement and communicate the District's legislative positions.
2. Foster relationships with local legislators and their staff.
3. Create and foster alliances and coalitions to advance common advocacy positions and objectives.



*Nick C. DeGroot
Water Treatment
Plant Operations
Committee Meeting*



*Donnell Dam
Spillway*

**GOAL 1:
Proactively and strategically implement and communicate the District’s legislative positions.**

- 1.1 – Develop and adopt the District’s legislative policy.
 - 1.2 – Annually update the Legislative Advocacy Program.
-

**GOAL 2:
Foster relationships with local legislators and their staff.**

- 2.1 – Annually meet with Board President, General Manager, Public and Government Relations Manager, and key legislative stakeholder(s).
 - 2.2 – Annually meet with District Public and Government Relations Manager and at least two peers from local agencies to discuss legislative strategy and objectives.
-

**GOAL 3:
Create and foster alliances to advance common advocacy positions and objectives.**

- 3.1 – Ongoing participation with the San Joaquin Tributaries Authority, Association of California Water Agencies, California Municipal Utilities Association, California Special Districts Association, our local business community, and other groups with common advocacy positions and objectives.
- 3.2 – Volunteer to serve on one or more industry organizations’ legislative/policy committee to advance policies that are beneficial to the District’s customers.

Retail Electric



STRATEGIC PRIORITY:

The District will implement an operating strategy for the electric utility to satisfy the legal prerequisites for starting the electric utility and to transition to a fully functional electric utility that keeps the promises we made to our community including:

1. Rates that are 15% below PG&E's.
2. No subsidy by the electric ratepayers of the water ratepayers, and vice-versa.
3. Local control of the utility through an accountable and transparent Board of Directors and management.
4. High standards of service reliability.
5. A utility that reflects local values.



Tulloch Powerhouse

5-YEAR GOALS

1. Continue to foster internal and external District communications and keep the community apprised of progress through the duration of the legal process and the transition phase.
2. Win the eminent domain lawsuit and arrive at a feasible purchase price for the electric distribution assets.
3. Develop a transition plan that anticipates and manages material risks of the project.
4. Execute the transition plan in a manner that anticipates and neutralizes the risks of the project.
5. Involve the public in significant processes and decisions such as rate design and public benefits planning.
6. Qualify the electric utility acquisition debt for the best achievable credit rating by the date when the debt must be rated.
7. Establish rates at least 15 percent below PG&E.
8. Maintain financial independence from water ratepayers.

Moving Forward

SSJID's future is bright. The 2024 Strategic Plan will be consulted on a regular basis by all branches of the District to ensure alignment with the District's overarching Mission and Vision for public service in the local community.

The following circumstances are examples of when it would be appropriate to consult the Strategic Plan for guidance, preparation, and collaboration:

- ✓ Board Meetings
- ✓ Budget Development
- ✓ Staff Meetings
- ✓ The Writing of Staff Reports to the Board
- ✓ Report Writing
- ✓ Capital Improvement Planning
- ✓ Internal Policies
- ✓ Public Presentations
- ✓ Meetings with Customers
- ✓ Interagency Meetings
- ✓ General Correspondence (email and verbal conversations)
- ✓ Employee Engagement



Engaging with Customers on the R-Ditch

Implementation Program

The 2024 Strategic Plan provides high-level goals and strategies to implement the District's defined Strategic Priorities.

The specific actions required to accomplish these goals are included in the District's "Implementation Program" for the 2024 Strategic Plan. The Implementation Program identifies specific initiatives and appropriate key performance indicators that will help the District track progress. Within each initiative, additional detail such as specific tasks, deliverables, anticipated start and completion dates, and the responsible personnel will be provided and identified. The Implementation Program would also serve as the primary means to report to the Board of Directors and District staff on completion of initiatives, obstacles to completion, and additional resource needs. The Implementation Program is intended to be a living document that will be evaluated, adjusted, and reprioritized as necessary at minimum once per year and prior to the development of the District's annual budget.

President John F. Kennedy once said,

"Efforts and courage are not enough without purpose and direction."

The 2024 Strategic Plan is meant to provide the purpose and direction to channel SSJID's efforts to meet our customers' needs currently, and for future generations.



*Goodwin Dam,
Knights Ferry, CA*

Future Strategic Planning Updates

Inevitably, the environment within the industry will evolve and the goals established in this document will be accomplished as time moves forward. It is envisioned that the 2024 Strategic Plan will be perpetually re-evaluated and updated every five years. The District's Mission, Vision, and Values serve as the foundation for future strategic plans. Updates to the plan will evaluate the need to modify strategic priorities, to produce additional goals, and to establish a new set of associated implementation plans required to achieve them.



Vineyard in District



SOUTH SAN JOAQUIN
IRRIGATION DISTRICT

