

MWDOC Board Strategic Priorities

September 2023

Draft Implementation Plan



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CONTENTS

OVERVIEW	5
INTENT OF THE IMPLEMENTATION PLAN	6
DEVELOPMENT OF THE IMPLEMENTATION PLAN	8
UTILIZATION OF THE IMPLEMENTATION PLAN	10
1. MWDOC'S MISSION & ROLES	13
2. MET POLICY POSITIONS.....	19
3. MET DIRECTOR CONSULTATION	23
4. RELIABILITY PLANNING.....	26
5. MEMBER AGENCY COLLABORATION.....	35
6. COMMUNICATION	39
7. STAFF DEVELOPMENT	44



OVERVIEW

In June 2023, the MWDOC Board identified seven (7) Strategic Priorities in a public multi-session process that incorporated feedback and input from various stakeholders, including member agency representatives. This effort was intentionally built upon the foundational work completed through the Member Agency Facilitated Discussions Project to ensure MWDOC's Strategic Priorities aligned with the needs of the community and MWDOC member agencies. Through a facilitated process these key priorities were developed to be consistent with MWDOC's authority, mission and roles.

Note that these priorities are set in the following topic areas and **not** listed in a ranked order of importance.

Topic Area	Board Strategic Priorities
<i>MWDOC's Mission</i>	Clarify MWDOC's mission and roles by defining those functions and actions that help provide cost-effective, long-term water reliability and security for its member agencies and Orange County constituents.
<i>Metropolitan Policy Positions</i>	Balance support for Metropolitan's regional mission and Orange County values and interests, with an emphasis on completing the IRP and shaping a sustainable business model.
<i>Metropolitan Director Consultation</i>	Ensure that Metropolitan Directors regularly reach out to and collaborate with MWDOC's member agencies to represent their interests and needs at Metropolitan.
<i>Reliability Planning</i>	Work with member agencies to develop water supply and demand objectives that take a broad view of cost-effective options to increase supply and manage demands.
<i>Member Agency Collaboration</i>	Solicit input and feedback from member agencies to support their needs and create opportunities that benefit Orange County's water future.
<i>Communications</i>	Strengthen communications and coordination of messaging with member agencies, tailored to large and small agency needs.
<i>Staff Development</i>	Invest in workforce development and succession planning to continuously strengthen and renew MWDOC's staff capabilities.

For the next step in this process, MWDOC staff were tasked to outline to the Board how staff plans to implement each strategic priority with a set of tangible actions and/or programs. As part of the Board's Strategic Workshop, the facilitator Paul Brown emphasized that these *Strategic Priorities were the "end" rather than the "means."* **Thus, this Implementation Plan outlines the "means" (actions/programs) that staff have developed to help achieve these overarching Board Priorities.**

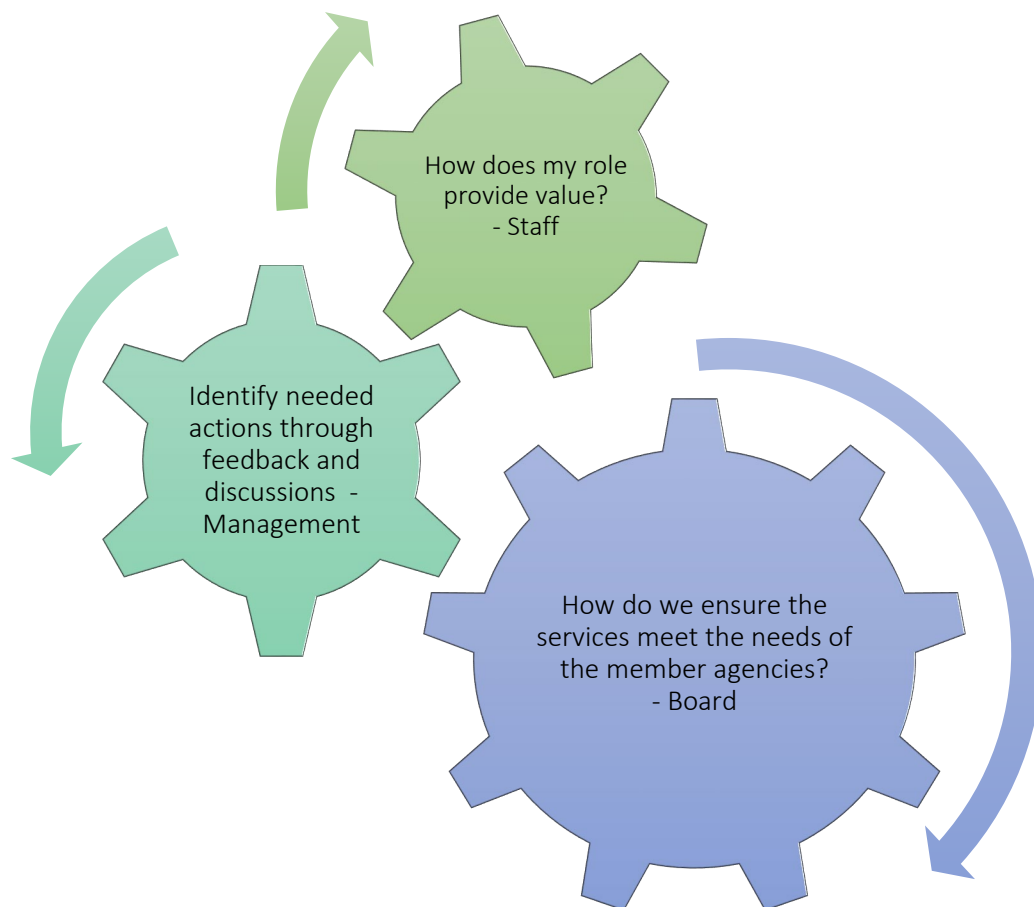
INTENT OF THE IMPLEMENTATION PLAN

The intent of this Implementation Plan is to provide a structured and actionable roadmap for staff in achieving each Strategic Priority. It will serve as a critical tool in translating the Board's high-level strategic goals into tangible actions that staff can undertake to contribute to the overall success of each department and the organization as a whole. Below are the key elements staff used in developing this holistic agency-focused Implementation Plan:

1. **Alignment with Strategic Priorities:** The primary intent is to ensure that the Implementation Plan aligns closely with the Board's Strategic Priorities and long-term goals of the organization. It should provide an outline of how the district's actions will achieve the Board's strategic vision.
2. **Clarity of Objectives:** The plan should clearly define specific objectives and outcomes by creating "goals". These goals utilize the SMART (Specific, Measurable, Achievable, Relevant, Time-bound) development approach to ensure a clear sense of direction.
3. **Responsibility Assignment:** Each "goal" within the Implementation Plan specifies which department(s) is responsible for each goal or action item. Specific action items will also be assigned to a specific employee or team of employees through the department internal goal setting process. This assigns accountability and ensures that employees understand their roles in achieving these objectives.
4. **Timeline and Milestones:** The Implementation Plan includes timing with specific milestones and deadlines. This helps in tracking progress and ensures that the work stays on schedule.
5. **Resource Allocation:** Each "goal" within the Implementation Plan generally outlines the resources required, including funds, additional personnel, additional technology, etc. This also provides information on whether a resource gap exists that could hinder progress, and if necessary, gives guidance on whether additional resources should be recommended during the next budget setting process.
6. **Communication:** The ongoing progress of this Implementation Plan will be communicated within the organization and to relevant stakeholders, including the member agencies, senior management team, and the Board.
7. **Feedback and Adaptation:** Following the development of this Implementation Plan, an effective mechanism for gathering feedback from employees and stakeholders will also be evaluated. This feedback can inform whether adjustments to the plan are needed to ensure effectiveness.
8. **Continuous Improvement:** The Implementation Plan reflects a commitment to continuously improve. This means that as "goals" are achieved, new objectives and strategies will be added or modified to maintain momentum and enhance the Board's intent.
9. **Measurable Performance Indicators:** The Implementation Plan outlines the actions that will then define the measurable performance indicators that management will establish as part of individual staff performance evaluations.
10. **Integration with Individual Employee Goals:** The actions/programs described in the implementation plan will be aligned with employees' individual goals and responsibilities. This alignment helps motivate employees and demonstrate how their efforts contribute directly to MWDOC's success.

11. Evaluation and Reporting: Reports and updates will be shared to demonstrate achievements and identify areas that may need further attention.

In essence, the intent of an Implementation Plan, as outlined in these elements above, is to provide a structured and comprehensive approach to achieving the Board's Strategic Priorities. It is designed to act as a guiding document that keeps the entire organization focused on the tasks that have been identified by the Board and ensures that everyone is working in harmony toward a common purpose.



DEVELOPMENT OF THE IMPLEMENTATION PLAN

The development of the Implementation Plan creates a structured outline for staff to apply the strategic vision of the Board, as identified through the Board Strategic Priorities, into actionable steps. Following direction from the Board strategic planning workshops, MWDOC staff held several internal meetings to cooperatively develop the set of actions as outlined in this Implementation Plan. In addition, various documents were also used as references to provide critical information, context, and guidance. These documents helped ensure that the plan is well-informed and aligned with MWDOC's mission, goals, and strategies. Below are the documents used as reference in developing this Implementation Plan:

- **MWDOC's Mission Statement**
- **Board Strategic Principles¹**
- **Strategic Planning Session (March 2023)²**
- **Strategic Planning Session (April 2023) 10 questions³**
- **2022 Member Agency Facilitated Discussion Phase 1⁴ and Phase 2⁵**

A key reference used was the lessons learned through the 2022 Member Agency Facilitated Discussions. A number of member agencies comments and suggestions are woven into this Implementation Plan. This includes the core objective: **for MWDOC and its member agencies to work together in a more collaborative manner**. In addition, there was consensus in feedback from the member agencies that MWDOC should avoid setting up a process that is perceived as “telling agencies what is needed,” but rather seeking out what the agencies want and need MWDOC to provide for them. Therefore, to improve methods of communication in how MWDOC develops a program, study, or service - **many of the specific actional steps are “exploratory” in nature before they are fully committed**.

This Implementation Plan should be a dynamic document that adapts to changing circumstances. It should be reviewed and updated regularly to ensure it remains relevant and effective in achieving the organization's goals. In the following *strategic priority topic area* sections, goals are listed in tables similar to the template below. Each strategic priority topic area outlines two to four initial goals. This was set to provide manageable and achievable deliverables by staff. As goals are achieved, new objectives and strategies will be added or modified to maintain momentum and drive ongoing progress.

¹ Board Strategic Priorities Workshop Recap (June 2023) <https://www.mwdoc.com/wp-content/uploads/2023/02/MWDOC-Bd-Strategic-Priorities-20230622-FINAL.pdf>









² Strategic Planning Session Presentation (March 2023) https://www.mwdoc.com/wp-content/uploads/2023/01/MWDOC-Bd-Strategic-Workshop-PPT_March-3_Compressed.pdf

³ Top 10 Questions from the Board Strategic Planning Meeting (April 2023) https://www.mwdoc.com/wp-content/uploads/2023/02/April-29_Board-Strategic-Planning-Meeting_10-Questions.pdf

⁴ Facilitated Discussions with MWDOC Member Agencies, Phase 1 (February 2022) <https://tinyurl.com/4yp97vde>

⁵ Facilitated Discussions, with MWDOC Member Agencies, Phase 2 (December 2022) <https://tinyurl.com/mrrtmd26>

Goal: Goal to meet the Board Strategic Priorities

Action	Specific action(s) to meet the goals
Key Audience	Relevant stakeholders including member agencies
Timing/Frequency	Timing with specific milestones and deadlines
Key Department(s)	        <p>Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources Finance & IT</p>
Resources (if needed)	Expected associated needed cost to implement these actions to achieve the goal. Including Core and Choice-based funding approach, if known.



UTILIZATION OF THE IMPLEMENTATION PLAN

Staff plans to utilize the Board Strategic priorities and Implementation plan as part of the general manager's annual goals, which will translate into department priority actions, and annual staff goalsetting. Whereby integrating components of this plan with staff's individual actions will better align their own goals and responsibilities with the Board's direction and vision. Moreover, alignment helps motivate employees by observing how their efforts contribute directly to the overall success of the District, which is commonly requested by staff. Fostering transparency about its strategic direction and goals, can lead to a shared sense of purpose and a better understanding of how each staff member's role and responsibly fits into the bigger picture.

The Implementation Plan can become a cornerstone for the General Manager's annual goal-setting process. Integrating the strategic priorities into the General Manager's goals ensures that the top leadership of MWDOC is fully committed to, and accountable for, driving these priorities forward. But it also provides clear direction as to what is expected by the Board and more importantly why.

Additionally, the Implementation Plan will be applied to each department's annual goal setting. Each department within MWDOC has its own set of priority actions that should directly contribute to the achievement of the strategic priorities. This Plan provides a framework for departments to develop their specific plans in alignment with the broader organizational goals.

Most importantly, the Implementation Plan will provide a resource for employees to derive their individual annual goalsetting. First off, this tool helps to ensure that individual efforts are harmoniously integrated into the department's and organization's objectives. Aligning employee actions and responsibilities with MWDOC's overarching priorities, not only keeps employees focused on what matters most to the organization, but also motivates them by showcasing how their efforts contribute directly to MWDOC's success. As employees work towards their goals and departmental priorities outlined in the plan, management will also have mechanisms to gather feedback for areas of improvement. This interactive improvement loop ensures that MWDOC remains agile and responsive to changing circumstances.

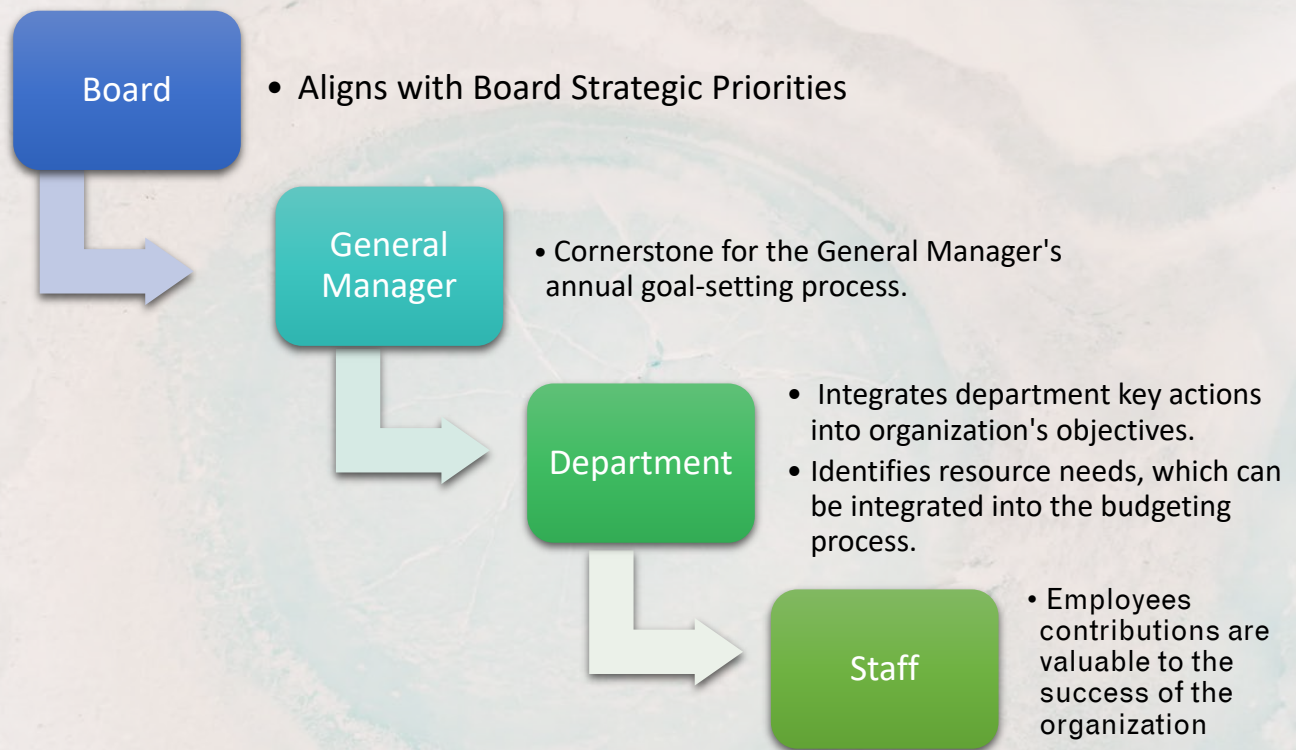
As mentioned earlier, the Implementation Plan also identifies resource needs, which can be integrated into the annual budgeting process. It ensures that resources, whether financial, personnel, or technological, are allocated efficiently to support the strategic priorities.

Below is an illustration of how staff propose to align the Board's Strategic Priorities down to the individual employees' goals, utilizing the implementation plan. Such a structure will promote accountability, enhance motivation, and ultimately contribute to MWDOC's success in fulfilling its mission and serving its community effectively.

Water Emergency Response Organization of Orange County (WEROC)

Due to the unique governance and financial structure of WEROC, staff will explore developing a strategic implementation plan similar to this approach.

If this complementary process would be of interest to the participating agencies, including the MWDOC Board, it would then be included in the MWDOC implementation plan as an addendum.



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1. MWDOC'S MISSION & ROLES

CLARIFY MWDOC'S MISSION AND ROLES BY DEFINING THOSE FUNCTIONS AND ACTIONS THAT HELP PROVIDE COST-EFFECTIVE, LONG-TERM WATER RELIABILITY AND SECURITY FOR ITS MEMBER AGENCIES AND OC CONSTITUENTS

Over the years, MWDOC has evolved into a facilitator role for local project development. MWDOC staff has initiated and facilitated member agency workgroup meetings, managed engineering and planning consultants, administered the financial and billing of specific programs/projects, and led early preliminary design work. Staff currently sponsors and submits Local Resource Program (LRP) applications to Metropolitan for a number of local resource projects.

MWDOC currently plays an administrator role in shared Metropolitan service connections, joint capacity pipelines, and treatment plants. For example, for IRWD's Baker Treatment Plant, MWDOC performs the billing for all the participating agencies.

As mentioned in the member agency facilitated process, the opinion from the member agencies was that MWDOC has a role in facilitating and collaborating on supply development within the service area, but MWDOC should only participate in supply development projects if the direct beneficiaries pay.









MWDOC also offers several programs through a shared services format. These programs leverage economies of scale to obtain professional services for individual agencies at 'bulk' rate pricing. MWDOC administers these services to further reduce agency costs by selecting, coordinating, and facilitating professional services while maintaining needed flexibility to effectively meet individual agency needs.

Initial goals for MWDOC's Mission & Roles identified to help meet this Board Strategic Priority are:

- a) Ensure all MWDOC's activities and priorities align with MWDOC's Mission and the Board Strategic Priorities
- b) Explore a plan to lay out collateral material on range of resources and programs available to member agencies
- c) Develop Shared Services Programs that support member agencies with regulatory compliance
- d) Implement Regional Programs that support member agencies with regulatory compliance

1. MWDOC'S MISSION & ROLES









Goal: Ensure all MWDOC's activities add priorities align with MWDOC's Mission and the Board Strategic Priorities

Action	<p>Review Future Board letters (Action and Information items) for consistency with MWDOC's mission and board strategic priorities</p> <p>Example:</p> <ul style="list-style-type: none"> • Include as section in the staff Board Memos of highlighting which Strategic Priority items support • Include in staff performance evaluations
Key Audience	MWDOC Board and management staff level
Timing/Frequency	Begin implementation during Q2; refine as needed upon Board Strategic Priorities updates/changes
Key Department(s)	        <p>Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources Finance & IT</p>
Resources (if needed)	None identified at this time






1. MWDOC'S MISSION & ROLES

Goal: Explore a plan to lay out collateral material on range of resources and programs available to member agencies

Action	<p>Identify what collateral material on range of resources, projects, services and programs MWDOC should make available to member agencies and key stakeholders</p> <p>Examples:</p> <ul style="list-style-type: none"> • Fact sheets on MWDOC service (e.g., Grants Program, Water Loss Control, Water Use Efficiency activities, Local Resources Program, etc.) • Present a proposed outline to the Board on a MWDOC “Year-In-Review” (handout and/or brief video)
Key Audience	Member agencies and Orange County constituents
Timing/Frequency	Present an outline to the Board on a MWDOC “Year-In-Review”; develop memos/material starting in the 2 nd Quarter; update annually/as-needed based on programmatic modifications
Key Department(s)	<div>         </div> <div> <p>Water Use Efficiency</p> <p>WEROC</p> <p>Gov. Affairs</p> <p>Public Affairs</p> <p>MET Issues</p> <p>Eng. & Planning</p> <p>Human Resources</p> <p>Finance & IT</p> </div>
Resources (if needed)	None identified at this time

Goal: Develop Shared Services Programs that support member agencies with regulatory compliance

Action	<p>Explore needed actions to assist member agencies to meet their Making Conservation a CA Way of Life objectives. Implement through the development of NEW Shared Services Programs.</p> <p>Areas of interest for new shared services programs:</p> <ul style="list-style-type: none"> • Irrigated Area for dedicated irrigation meter measurements • Commercial, Industrial, Industrial (CII) classification system • Prepare CII Best Management Practices Plans • Begin separation of indoor/outdoor water meters (mixed use)
Key Audience	Retail agency level including three cities (optional)
Timing/Frequency	To meet the key milestones of <i>Making Conservation a California Way of Life</i>
Key Department(s)	<div>    </div> <div> Water Use Efficiency Gov. Affairs Public Affairs </div>
Resources (if needed)	Choice-based with consultant services will be identified based on specific action

MWDOC collaborates with local water agencies, cities, and stakeholders to promote water use efficiency and sustainable water practices. MWDOC advocates for water-related policies at the state level, pushing for regulation and legislation that promote responsible water use.




Conservation and efficient use of water has been underpinned as critical and one of the many tools for a comprehensive long-term water supply reliability strategy. Since 2020, there are two Water Use Efficiency/Conservation areas that MWDOC has focused on that will have the most impact and increase water savings. First is assisting our member agencies to prepare for compliance with the *Conservation as a California Way of Life* water use efficiency standards framework. Second is to continue to develop, implement, and evaluate a broad variety of water use efficiency programs targeting all consumer groups.

1. The *Conservation as a California Way of Life* framework is vastly more complex than the 2009 SBx7-7 framework, known as the 20% by 2020 framework. Assisting member agencies via choice-based services for achieving compliance with the evolving *Conservation as a California Way of Life* standards includes:

- Commercial, Industrial, and Institutional (CII) Performance Measures (planned for FY 2023-24) including CII Customer Classifications, CII Best Management Practices (BMP) Implementation Plans, and Implementation of BMP Plans.
 - Landscape area measurements, including residential landscape area measurement refinements (ongoing) and Dedicated Irrigation Meter Area Measurements through NV5 (under way).
 - Distribution system water loss (SB 555 -ongoing) Shared Services and Technical Assistance.
 - General Support for Compliance with Standards (ongoing).
2. MWDOC is continuing to develop, implement, and evaluate a broad menu of water use efficiency programs on behalf of its member agencies. These programs focus on all customer classes and types of water use, with an emphasis on landscape water saving opportunities; approximately 50% (and sometimes up to 80%) of total water use in Orange County is applied to landscaping. Staff will continue to maximize grant funding to minimize local funding needs.



Goal: Implement Regional Programs that support member agencies with regulatory compliance

Action	<p>Evaluate and modify <u>existing</u> regional MWDOC Water Use Efficiency and Water Loss programs</p> <p>Examples below are in following key areas:</p> <ul style="list-style-type: none"> • Turf Removal • Water Loss Control Technical Assistance
Key Audience	Retail agency level including three cities (optional)
Timing/Frequency	On-going with monthly touch points with member agencies at the Water Use Efficiency coordinators meetings and member agency general managers meetings. To meet the key milestones of <i>Making Conservation a California Way of Life</i>
Key Department(s)	<div>    </div> <div> <p>Water Use Efficiency</p> <p>Gov. Affairs</p> <p>Public Affairs</p> </div>
Resources (if needed)	Core and Choice-based program structure as existing

MWDOC has worked closely with the cities of Anaheim, Fullerton, and Santa Ana (Three Cities) to extend the aforementioned programs into their service territories as well through a [Master Agreement](#). MWDOC and the Three Cities' staffs have found it administratively efficient to streamline many of MWDOC's regional programs through a single agreement that covers several programs. This formalization allows for timely processing of payments, clear delineation of program participation, and delineation of the roles and responsibilities for both signatories.

2. MET POLICY POSITIONS

BALANCE SUPPORT FOR METROPOLITAN'S REGIONAL MISSION AND ORANGE COUNTY VALUES AND INTERESTS, WITH AN EMPHASIS ON COMPLETING THE IRP AND SHAPING A SUSTAINABLE BUSINESS MODEL

A core function of MWDOC is to be the representative of the ratepayers and member agencies of our service area at Metropolitan. We strive to ensure we properly advocate for the needs and services of all our member agencies at Metropolitan. Accordingly, there has always been an understanding that issues acted upon by the MWDOC-Metropolitan Board members must be evaluated and examined considering the unique needs of all Orange County's water suppliers.

The 2023 Orange County Reliability Study recommends a policy position of an "all-of-the above" strategy that continues to advocate for water use efficiency and water supply projects at the local and regional level to meet future demands.

It has long been recognized that there is a need for a robust water portfolio that includes securing our existing core imported supplies, developing new local supplies, and continue water use efficiency measures. To ensure the continued reliability of Southern California's regional water supplies, MWDOC has also been actively participating with Metropolitan and other member agencies in its development of a Climate Adaptation Master Plan for Water (CAMP4W). CAMP4W is intended to be a roadmap that will guide future capital investments and form a business model to confront the new climate reality in the years and decades ahead.

While Metropolitan and MWDOC typically play a critical role in supporting the success of local projects, ultimately, each local water agency determines the types of projects and actions based on what is best for their local needs.

Initial goals for MET Policy Positions identified to help meet this Board Strategic Priority are:







- a) Clarify understanding of MWDOC's regional responsibilities (as defined by Metropolitan) and how that translates to MWDOC and all of Orange County
- b) Explore options to redefine Metropolitan's local resources program (LRP)
- c) Explore options to refine Water Use Efficiency through MET's Conservation Credits Program and expand use of local projects through the Onsite-retrofit Program

Metropolitan's CAMP4W Process





A key part of the CAMP4W process involves integrating resource and planning with Metropolitan's ongoing financial plan and business model considerations. This will ensure Metropolitan's planning reflects the project and program costs needed to continue to provide a reliable and resilient system in the face of a changing climate.

The Integrated Resources Plan (IRP) Needs Assessment was completed by Metropolitan in 2020 and adopted by the Board in 2022. This effort involved comprehensive modeling to identify the storage and supply needs for the region across multiple planning scenarios. The planning scenarios were developed based on both population and demand forecasts, as well as the impacts of climate change. Member agencies were involved throughout the process and provided input on the modeling parameters.

Goal: Clarify understanding of MWDOC's regional responsibilities (as defined by Metropolitan) and how that translates to MWDOC and all of Orange County

Action	<p>Identify key priorities of Metropolitan member agencies by attending/listening on how those issues effect Orange County</p> <p>Example:</p> <ul style="list-style-type: none"> • Examine and understand local responsibilities to the region • Hold workshops and discussions with member agencies and directors • Develop fact sheets on regional projects and programs that impact Orange County (e.g., Recycled Water, Conservation, Sites Reservoir, Delta Conveyance Project, and Colorado River Issues, etc.) • Evaluate the financial or incentive impacts of modifications to Metropolitan's business model and the CAMP4W outcomes/findings
Key Audience	MWDOC Board and member agencies
Timing/Frequency	Align with CAMP4W timeline process and key decisions at Metropolitan
Key Department(s)	<div>       </div> <div> MET Issues Eng. & Planning Water Use Efficiency Gov. Affairs Public Affairs Finance & IT </div>
Resources (if needed)	None identified at this time






Goal: Explore options to redefine Metropolitan's local resources program (LRP)

Action	<p>Evaluate alternative LRP options and how these fit into MET's CAMP4W as well as changes to MET's Business Model.</p> <p>Example:</p> <ul style="list-style-type: none"> • Evaluate enhanced LRP options through partnerships and exchanges. Test through local projects currently under development • Looks at changes in Metropolitan policy to assist local project development
Key Audience	MWDOC Member agencies & Metropolitan member agencies
Timing/Frequency	Align with CAMP4W process and key decisions at Metropolitan
Key Department(s)	<div>     </div> <div> MET Issues Eng. & Planning Gov. Affairs Finance & IT </div>
Resources (if needed)	None identified at this time

MWDOC continues to work with local and regional water agencies on implementation planning for local resources projects, including the [Doheny Ocean Desalination Project](#). In FY 2023-24, the Metropolitan Board will be considering a regional assessment of water desalination opportunities and technology. The scope of this effort will include: (1) preparing an inventory of potential seawater desalination plant sites in Metropolitan's service area; (2) assessment of permitting and regulatory frameworks that would potentially impact the potential siting of a seawater desalination plant; (3) developing an evaluation methodology for the suitability of this water supply, including consistency with Metropolitan's commitment to carbon neutrality by 2045; (4) identifying applicable water quality and regulatory requirements; (5) developing conceptual cost estimates and schedules for water produced from desalination facilities; (6) developing project implementation options that would best suit these types of facilities; (7) determining the approximate proportion and area of Metropolitan's service area that would potentially receive water from the plant; and (8) assessing the near-term potential for advances in seawater desalination technologies. Similar work is also being undertaken for potential brackish water resources. On behalf of its Orange County service area, MWDOC will coordinate with Metropolitan on the preparation of this assessment.

2. MET POLICY POSITIONS

Goal: Explore options to refine Water Use Efficiency through MET's Conservation Credits Program and expand use of local projects through the Onsite-retrofit Program

Action	Utilize Metropolitan Program Advisory Committee (PAC) to implement more progressive regional Conservation Credits Program; Evaluate changes in Metropolitan policy to assist local projects through its Onsite-retrofit Program
Key Audience	MWDOC-MET Directors, member agencies, and water use efficiency coordinators
Timing/Frequency	Align with Metropolitan Budget process, CAMP4W process, and key decisions at Metropolitan
Key Department(s)	 MET Issues  Eng. & Planning  Water Use Efficiency  Gov. Affairs  Finance & IT
Resources (if needed)	None identified at this time

MWDOC also plays a vital role in helping the region implement consistent water use efficiency and demand management goals. Regional conservation activities are incubated through Metropolitan's Program Advisory Committee (PAC). The PAC meetings are important for member agency engagement, communication, and program success. Metropolitan member agencies utilize the PAC's practical, detailed, and technical forum to develop new or modified programs through the Conservation Credits Program.



For example, to assist local projects, Metropolitan's On-site Retrofit Program provides financial incentives to property owners who convert their irrigation or industrial water systems from imported water to recycled water. The program is available to public and private property owners in the Metropolitan service area.

3. MET DIRECTOR CONSULTATION

ENSURE THAT METROPOLITAN DIRECTORS REGULARLY REACH OUT TO AND COLLABORATE WITH MWDOC'S MEMBER AGENCIES TO REPRESENT THEIR INTERESTS AND NEEDS AT METROPOLITAN

To best serve the entire region, we host a number of monthly meetings to **communicate the issues, actions, and upcoming activities at Metropolitan in order to receive feedback and direction from both our Directors and member agency representatives.**

The monthly meetings hosted by MWDOC include:

- *Joint MWDOC-MET Board Workshop* – attended by the MWDOC Board, MWDOC-MET Directors, member agency directors and staff. Additionally, other Metropolitan Board members, such as those from the three cities, are always welcomed to participate. This is a public meeting at which Metropolitan staff are often invited to present.
- *MWDOC Member Agency Meeting* – attended by member agency general managers and/or senior staff.
- *OC-MET Managers Meeting* – attended by senior staff from MWDOC, OCWD, Santa Ana, Anaheim, and Fullerton.







The MWDOC-MET Directors also participate in the monthly Metropolitan Inland and Orange County Caucus meeting. The purpose and intent of this meeting is for the Metropolitan Directors, representing several Inland as well as Orange County Metropolitan member agencies, to directly discuss and ask questions to Metropolitan senior management on the upcoming Metropolitan Board and committee discussion and action items. On critical votes, the MWDOC-MET Directors will also confer, within the parameters of the Brown Act, with other Metropolitan Directors (that have both aligning and opposing positions) to yield a broader understanding of the areas of concern.

Initial goals for *MWDOC-MET Director Consultation* identified to help meet this Board Strategic Priority are:

- a) Actively bring together all Metropolitan representatives from Orange County and ensure information exchange between MWDOC and all OC-MET directors is open, frequent, and transparent
- b) Facilitate MWDOC-MET Directors attendance in other member agency meetings inside and outside of the MWDOC service area

3. MET DIRECTOR CONSULTATION







Goal: Actively bring together all Metropolitan representatives from Orange County and ensure info exchange between MWDOC and all OC-MET directors is open, frequent, and transparent

Action	<p>Explore a format to best increase active participation and productive dialogue with the Three Cities and member agencies, with a long-term goal of finding common objectives and goals at Metropolitan</p> <p>Example:</p> <ul style="list-style-type: none"> Evaluate and test active participation methods (e.g., Joint Board Workshop, small lunch meetings, standing monthly meetings, semi-annual retreat, etc.) <p>Aligns with Strategic Priority #2, MET Policy Positions</p>
Key Audience	MWDOC-MET Directors, OC-MET Directors, member agencies
Timing/Frequency	Occurs when Metropolitan has upcoming key decisions and/or actions
Key Department(s)	<div>       </div> <div> <p>MET Issues</p> <p>Eng. & Planning</p> <p>Water Use Efficiency</p> <p>Gov. Affairs</p> <p>Public Affairs</p> <p>Finance & IT</p> </div>
Resources (if needed)	None identified at this time



3. MET DIRECTOR CONSULTATION

Goal: Facilitate MWDOC-MET Directors attendance in other member agency meetings inside and outside of the MWDOC service area

Action	<p>Explore a format to best increase active participation and productive dialogue among member agencies, both within MWDOC's and Metropolitan's service area. Discuss key and current issues at MWDOC and Metropolitan.</p> <p>Example:</p> <ul style="list-style-type: none"> • Staff provided support on meetings with talking points and information summaries • Facilitate Director engagement, where valuable, at other meetings not typically previously attended by Directors <p>Aligns with Strategic Priority #5, Member Agency Collaboration</p>
Key Audience	MWDOC-MET Directors, OC-MET Directors, member agencies
Timing/Frequency	Align with key decisions/actions at Metropolitan
Key Department(s)	<div>       </div> <div> MET Issues Eng. & Planning Water Use Efficiency Gov. Affairs Public Affairs Finance & IT </div>
Resources (if needed)	None identified at this time

When discussing key and current issues at MWDOC and Metropolitan, we have learned that one size fits all outreach effort does not meet the needs of each member agency. Staff plans to work with key directors to identify and explore both formal and informal settings.

4. RELIABILITY PLANNING

WORK WITH MEMBER AGENCIES TO DEVELOP WATER SUPPLY AND DEMAND OBJECTIVES THAT TAKE A BROAD VIEW OF COST-EFFECTIVE OPTIONS TO INCREASE SUPPLY AND MANAGE DEMANDS

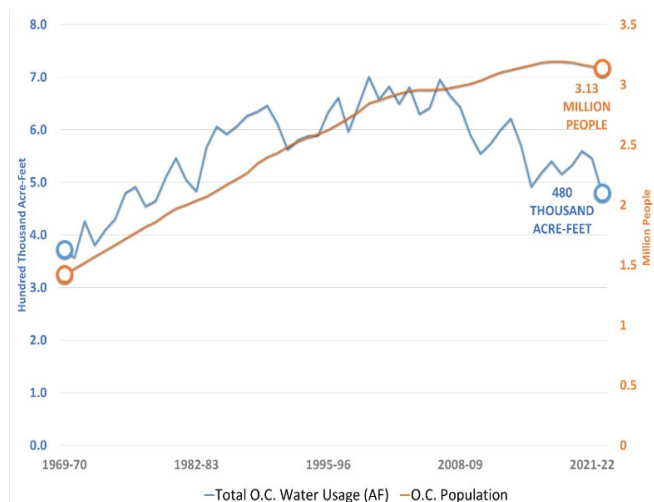
Following the completion of MWDOC's initial [Orange County Reliability Study](#) in 2016, the [study was updated in 2018](#), and most recently again in [2023](#). The Orange County Water Reliability Study is a comprehensive study of Orange County's long-term water reliability, providing valuable information to key decision makers regarding the future of Orange County's water supplies. These planning efforts set MWDOC apart as a leader in adapting to, and the evaluation of, climate change impacts.

The evolving scientific understanding of climate change has been tracked since the beginning of these planning efforts and the latest information relevant to water supply and demand impacts to Southern California's water supply sources has been incorporated into these studies. The purpose of reliability planning is to provide information to decision makers early enough to make sound and necessary investment decisions. The 2023 Orange County Reliability Study looked at two main climate change characteristics which climate experts indicate are likely to have large impacts on future water supplies - temperature and precipitation. The 2023 Orange County Reliability Study recommends a policy position of an "all-of-the above" strategy that continues to advocate for water use efficiency and water supply projects at the local and regional level to meet future demands.

MWDOC has addressed anticipated growth within its boundary in the [2020 Urban Water Management Plan](#) and the [2023 Orange County Water Reliability Study](#). Both documents, prepared by MWDOC in collaboration with Orange County retail water agencies, use anticipated growth as a basis for determining if water supplies are adequate, reliable, and affordable.

The information and demand/supply analyses contained within these comprehensive plans are coordinated with demographers at the Center for Demographic Research (CDR) at Cal State Fullerton and the region's development planner the Southern California Association of Governments (SCAG), as well as with Metropolitan and Orange County retail water agencies.

As noted in the 2020 UWMP, North Orange County is predominately built-out and development is in the form of re-development infill. In contrast, South Orange County has potential for new development, with vacant areas gradually transitioning to residential and commercial mixed-use areas. MWDOC and its member agencies work with the local permitting agencies to ensure that local planning information is incorporated into long-range



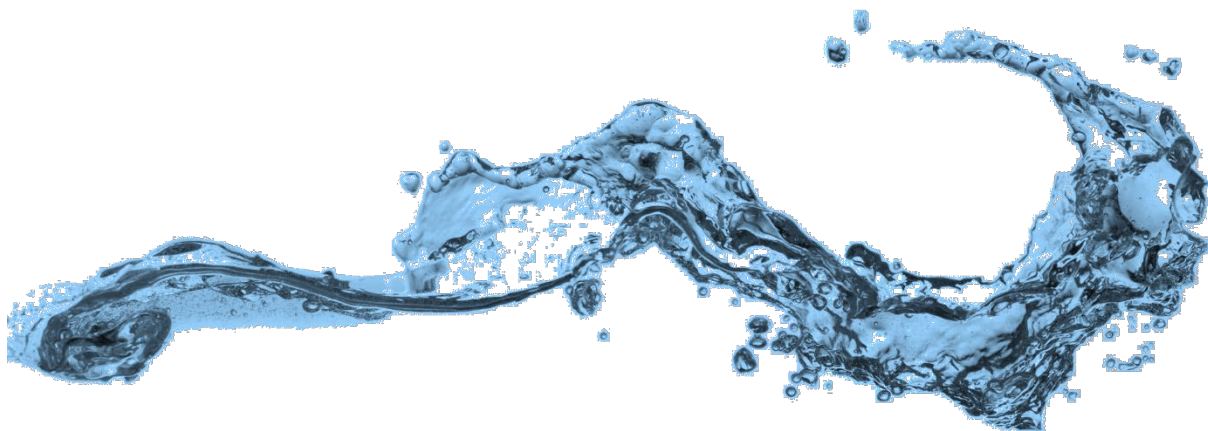
water resources planning by assessing that there are adequate water supplies to meet future demands for the 25-year planning horizon.

As the local permitting agencies, Orange County cities plan for the additional development within their local jurisdictions. Additionally, because of stringent water use standards in place for new development state-wide, MWDOC expects future development to have less of an impact on total water demands than has historically been the case.







While population growth and water demands (in large part due to tremendous strides in efficiency) are far less than once predicted, to ensure those future demands are satisfied, additional supply investments are currently being developed and more are under consideration by Orange County water agencies and Metropolitan.

Initials goals for *Reliability Planning* identified to help meet this Board Strategic Priority are:

- a) Evaluate and expand cost-effective options to increase reliability and manage demands per member agency needs
- b) Update MWDOC's Reliability Study as key indicators signify shift in the range of scenario plausibility
- c) Work with member agencies and Metropolitan to develop water supply and demand objectives that take a broad view of cost-effective options to increase supply and manage demands
- d) Explore advances in technology for reliability planning purposes



Goal: Evaluate and expand cost-effective options to increase reliability and manage demands per member agency needs

Action	<p>Evaluate the need to modify or expand shared services offered to optimize cost-effectiveness and program efficacy</p> <p>Examples:</p> <ul style="list-style-type: none"> • Lead & Copper Rule Revision Shared Services Program • Water Loss Control Technical Assistance • Water Loss Control Shared Services <p>Aligns with Strategic Priority #1, MWDOC's Role & Mission</p> <p>Aligns with Strategic Priority #5, Member Agency Collaboration</p>
Key Audience	MWDOC Board and member agencies
Timing/Frequency	TBD
Key Department(s)	<div>  MET Issues  Eng. & Planning  Water Use Efficiency  Gov. Affairs  Public Affairs  Finance & IT </div>
Resources (if needed)	Choice-based program structure as existing

MWDOC also offers a number of programs through a shared services format. These programs leverage economies of scale to obtain professional services with the purpose of reducing member agency costs while maintaining needed flexibility to effectively meet individual agency needs. The table on the next page lists the current services MWDOC provides to assist in reliability and demand management.

The following **new** shared services have been recently implemented or expanded per member agency requests:

Lead & Copper Rule Revision Shared Services Program - In 2023, at the request of multiple Orange County water agencies, MWDOC added a new shared service to assist Orange County water agencies in their compliance efforts with US EPA Federal regulations known as the National Primary Drinking Water Regulation: Lead and Copper Rule Revisions. This joint effort yields savings in cost and time through economies of scale by as much as 20% to 40% per service. Based on current interest, the number of water system connections at these agencies varies from 1,204 to 64,166 connections.

Water Loss Control Technical Assistance - Due to the needs of the Orange County retail agencies, MWDOC has expanded the water loss control technical assistance tasks available to the retail agencies over time. Annually, agencies select the services they plan to access. The MWDOC Water Loss Control Technical

Assistance program now offers a total of ten services with several sub-tasks designed to assist agencies in obtaining compliance with the water loss mandate adopted by the legislature through Senate Bill (SB) 555 from 2015. These tasks range from water audit compilation, component analysis, to State Water Resources Control Board water loss standard assistance.

Water Loss Control Shared Services – Water Loss Control Shared Services includes: Annual water balance validation, Distribution system leak detection, Customer meter accuracy testing, and Suspected leak investigations. Distribution System Leak Detection services have expanded significantly since 2020. There has been more than a 250% increase in miles of distribution system surveyed from FY 2019-20 to FY 2023-24, resulting in a total of 5,114 miles surveyed. Additionally, the number of agencies accessing these services each year has also increased. In FY 2023-24, 24 out of 29 retail water agencies (83%) in Orange County have accessed these services.








MWDOC leak detection technicians use listening equipment to find hidden leaks.

Examples of other current shared services which MWDOC provide to its member agencies in reliability and demand management are listed below:

Contractor(s)	Services Provided	Cost Savings or Operational Efficiencies
E-Source	Water Loss Control Technical Assistance	Provides MWDOC & retail agencies access to specialized distribution system water loss reduction services. MWDOC conducts an RFP process to select the contractor and provides contract management services on behalf of retail agencies. Both of these efforts result in significant staff time and cost savings to retail agencies.
McCalls Meters, Inc. and Westerly Meter Service Company	Customer Meter Accuracy Testing	Provides retail agencies access to specialized customer meter accuracy testing services. MWDOC conducts an RFP process to select the contractor and provides contract management services on behalf of retail agencies. Both of these efforts result in significant staff time savings and favorable pricing due to economies of scale to retail agencies.
Droplet Technologies	Customer Rebate Processing Software	Allows for centralized rebate processing by MWDOC staff on behalf of retail water agencies, resulting in significant staff time and cost savings to retail agencies.
Mission Resource Conservation District	Landscape Programs Pre- and Post-Retrofit Eligibility Inspections and Installation Verification Inspections.	Provides retail agencies access to eligibility inspection services. MWDOC conducts an RFP process for contractor selection and provides contract management services on behalf of retail agencies. Both of these efforts result in significant staff time savings and favorable pricing due to economies of scale to retail agencies.
Garden Soft	Website containing a Comprehensive Library of Water Efficient Landscape Information and Resources that are customized to Orange County.	Provides retail agencies and the public access to a regional website in one location, thereby avoiding duplication by each agency.
Plant Nerd, TerraWorks, and EcoTech Services	Landscape Design and Maintenance Assistance	Provides Turf Removal Rebate Program participants with landscape and irrigation design plans and landscape maintenance plans. MWDOC conducts an RFP process to select the contractor and provides contract management services on behalf of the retail agencies. These efforts result in significant staff time savings and favorable pricing due to economies of scale to retail agencies.
Large Plumbing, Inc. and RSM Plumbing	Provides Single-Family Home Pressure Reducing Valve Testing and Replacement Services	This effort is designed to quantify water savings of a potentially new water use efficiency program. Once approximately 125 failed PRVs are replaced, MWDOC staff will perform a statistical water savings evaluation. If replacing failed PRVs are found to produce a measurable water savings, staff will consider expanding this research effort to implement a larger scale retrofit program for further evaluation.






Contractor(s)	Services Provided	Cost Savings or Operational Efficiencies
Soto Resources	Provides Grant Reporting Assistance	<p>On behalf of MWDOC and its member agencies, Soto Resources monitors and tracks federal, state, and local funding opportunities; provide feedback, as requested, on potential funding opportunities; identifies potential funding opportunities and matches them to local and regional projects; and provides evaluations available grant opportunities. This comprehensive project list with matching grant opportunities is updated and circulated monthly. Provides grant writing and management under a separate contract as a choice program.</p> <p>Using grant funds, Soto Resources provides MWDOC with quarterly grant reporting assistance for a Proposition 1, Round 2 grant titled Regional Comprehensive Landscape Rebate Program. This regional grant reaches from Orange County to Big Bear and includes MWDOC as lead agency, along with EMWD, WMWD, IEUA San Bernardino Valley MWD and City of Big Bear.</p>
NV5 (a.k.a., Quantum Spatial)	Dedicated Irrigation Meter Irrigated Area Measurements	Provides retail agency access to dedicated irrigation meter irrigated area measurements in preparation for compliance with the Conservation as a California Way of Life mandates promulgated through SB 606 and AB 1668. MWDOC conducts an RFP process to select the contractor and provides contract management services on behalf of retail agencies. Both of these efforts result in significant staff time savings and favorable pricing due to economies of scale to retail agencies.
Flume, Inc.	Water Use Efficiency Research	This research allows MWDOC and its retail agencies to gauge current levels of compliance with the pending Conservation as a California Way of Life mandate. In addition, it identifies future WUE programs to implement to maximize cost effective water savings.
Stetson Engineering	Consumer Confidence Reports	Consultant accumulates data and coordinates the production of annual Consumer Confidence Reports (CCR's) for 29 Agencies and Cities.
On-Call Engineering Firms	Technical Services to Support Reliability Planning, Engineering & Resource Development	<p>Links for additional information:</p> <ul style="list-style-type: none"> ○ Firms Available to Provide On-Call Services ○ RFQ Description of Potential Work for On-Call Contractors

Goal: Update MWDOC's Reliability Study as key indicators signify shift in the range of scenario plausibility

Action	<p>Monitor key indicators to determine when there has been a shift in the range of scenario plausibility</p> <p>Examples of key indicators include:</p> <ul style="list-style-type: none"> • Sustained impacts to demand projections • Sustained impacts to supply projections • Climate change trends differing from analysis assumptions • Significant impacts to regulations not accounted for in our assumptions • Changes to Metropolitan capital projects not accounted for in our assumptions
Key Audience	MWDOC-MET Directors, MWDOC Board, member agencies
Timing/Frequency	Update on a five-year cycle or as-needed based on key indicators
Key Department(s)	<div>      </div> <div> MET Issues Eng. & Planning Water Use Efficiency Gov. Affairs Public Affairs </div>
Resources (if needed)	None identified at this time







4. RELIABILITY PLANNING

Goal: Work with member agencies and Metropolitan to develop water supply and demand objectives that take a broad view of cost-effective options to increase supply and manage demands

Action	Explore Water Use Efficiency research relevant to demand management Example: <ul style="list-style-type: none"> • Flume Water Use Efficiency Research • Water Use Efficiency Potential and Opportunity Study
Key Audience	MWDOC-MET Directors, MWDOC Board, member agencies
Timing/Frequency	To meet the key milestones of <i>Making Conservation a California Way of Life</i>
Key Department(s)	     MET Issues Eng. & Planning Water Use Efficiency Gov. Affairs Public Affairs
Resources (if needed)	None identified at this time

The Flume Water Use Efficiency Research allows MWDOC and its retail agencies to gauge current levels of compliance with the pending Conservation as a California Way of Life mandate and completed in coordination with Residential End Use analysis. To take research activities one step further, MWDOC also embarked on a Potential and Opportunities Study to guide future program implementation to maximize water savings opportunities and cost effectiveness.

Goal: Explore advances in technology for reliability planning purposes

Action	<p>Evaluate and test how Artificial Intelligence and other advance technologies might be applied to MWD OC's current and future services.</p> <p>Examples:</p> <ul style="list-style-type: none"> • Explore how Geographic Information System (GIS) mapping and Artificial Intelligence (AI) could strengthen our scenario planning analysis • Discuss with other agencies on how they apply GIS, AI, or other technologies in their business applications • Evaluate the Cost and benefits
Key Audience	MWD OC Board and member agencies
Timing/Frequency	TBD
Key Department(s)	<div>  MET Issues  Eng. & Planning  Water Use Efficiency  Gov. Affairs  Public Affairs  Finance & IT </div>
Resources (if needed)	TDB



5. MEMBER AGENCY COLLABORATION

SOLICIT INPUT AND FEEDBACK FROM MEMBER AGENCIES TO SUPPORT THEIR NEEDS AND CREATE OPPORTUNITIES THAT BENEFIT OC'S WATER FUTURE

In 2022, MWDOC completed a Facilitated Discussions Project with MWDOC's member agencies. As part of the first phase of this project, 37 interviews were conducted with water managers and elected officials in the MWDOC's service area. The purpose of these interviews was to determine an overall assessment of MWDOC's performance and services to its member agencies.

Key take aways from the first phase interviews:

- Common denominators among most respondents include an acknowledgment of MWDOC's foundational role as a Metropolitan member agency, an appreciation of the dedication and accessibility of MWDOC's staff (frequently mentioned), and praise for MWDOC's effectiveness in implementing demand management and public education programs.
- At the same time, many respondents believe MWDOC can improve responsiveness to its member agencies' needs and clarify the boundaries of its influence over decisions made by its member agencies.

Through the second phase of this project, MWDOC and the member agencies sought to identify ways to improve MWDOC's services and advocacy, as well as further define MWDOC's role and responsibility in Orange County and among the member agencies. Through a prioritization of issues, the workgroup was able to develop a consensus on the member agencies' and MWDOC's needs and expectations in three key categories: (1) Water Supply Planning; (2) Water Supply Development; and (3) Metropolitan Representation. Below are key take aways in each of these areas of discussion:

Water Supply Planning	Water Supply Development	Metropolitan Representation
MWDOC and Member Agencies should share responsibility for water supply reliability planning.	MWDOC has a role in facilitating and collaborating on supply development within its service area.	Metropolitan Directors are expected to be as transparent as possible regarding the policy positions, intentions, actions, and reasons informing their votes.
MWDOC's planning role should focus primarily on imported supply reliability under varied conditions.	MWDOC should only participate in supply development projects if the direct beneficiaries pay.	Member agencies expect increased OCWD involvement in policy positions at Metropolitan, especially those impacting groundwater.
MWDOC should integrate member agency perspectives into its planning efforts.	New water supply opportunities outside MWDOC's service area should be driven primarily by Member Agencies.	
MWDOC should facilitate dialogue and collaboration on infrastructure, resources planning, and development.	There is a widely shared need for an improved decision-making process, greater collaboration, and more transparency in water supply development activities.	Expectation that member agencies play a role in the development of MWDOC policy positions, helping balance OC interests and broader regional needs.

From these facilitated discussions there is a general consensus that MWDOC and its member agencies can work together in a collaborative manner. Additionally, there is an interest for greater involvement and integration of the member agencies in MWDOC's planning process.

Therefore, MWDOC will seek out what the agencies want and need MWDOC to provide for them. This will display an improved method of communication in how MWDOC will approach and process a future program, study, or action.

The future responsibility of MWDOC is to demonstrate our commitment through our actions and how we plan to address the needs and expectations of the member agencies.









Initial goals for *Member Agency Collaboration* identified to help meet this Board Strategic Priority are:

- a) Implement the key findings from the Member Agency Facilitated Discussion
- b) Solicit input from our member agencies that create opportunities that benefit Orange County's water future











5. MEMBER AGENCY COLLABORATION

Goal: Implement the key findings from the Member Agency Facilitated Discussion

Action	<p>Explore effective mechanisms to solicit better feedback from member agencies on their needs and expectations</p> <p>Examples:</p> <ul style="list-style-type: none"> • Annual survey (e.g., are we headed in correct direction?) • Member agency invitations to present at our monthly Board meetings (e.g., “Member Agency Spotlight”) to hear their needs and challenges • More regular visits from our Directors and staff with the member agencies
Key Audience	MWDOC Board and member agencies
Timing/Frequency	Monthly and align with key decisions/actions at MWDOC
Key Department(s)	<div>         </div> <div> Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources Finance & IT </div>
Resources (if needed)	None identified at this time

5. MEMBER AGENCY COLLABORATION

Goal: Solicit input from our member agencies that create opportunities that benefit Orange County's water future

Action	<p>Explore effective mechanisms to solicit feedback from member agencies and relevant stakeholders before MWDOC takes legislative/regulatory positions</p> <p>Examples:</p> <ul style="list-style-type: none"> Legislative policy principles Water quality (e.g., salinity control, nitrification)
Key Audience	MWDOC Board and member agencies
Timing/Frequency	Monthly and align with key decisions/actions at MWDOC
Key Department(s)	<div>         </div> <div> <p>Water Use Efficiency</p> <p>WEROC</p> <p>Gov. Affairs</p> <p>Public Affairs</p> <p>MET Issues</p> <p>Eng. & Planning</p> <p>Human Resources</p> <p>Finance & IT</p> </div>
Resources (if needed)	None identified at this time

MWDOC annually establishes a set of legislative policy principles to serve as a foundation for effective advocacy and governance. These principles not only reflect the organization's values and objectives but also provide a unified framework for decision-making across departments. By involving staff from various departments under the direction of the Board, along with feedback from the member agencies in the formulation of these principles, MWDOC ensures that it benefits from a diverse range of expertise and perspectives, resulting in well-rounded policies that address multifaceted issues effecting the service area.

These legislative policy principles also act as a compass for both staff and legislative advocates, guiding them in their efforts to navigate the complex landscape of legislative and regulatory matters. They provide clarity and consistency in MWDOC's approach to critical issues, ensuring that the organization speaks with a unified voice when advocating for its interests. Furthermore, these principles help MWDOC adapt to changing political and environmental circumstances, allowing the organization to remain agile and responsive in a rapidly evolving climate. Overall, the establishment of such policy principles underscores MWDOC's commitment to transparency, accountability, and effective governance, ultimately benefiting the communities it serves.

6. COMMUNICATION

STRENGTHEN COMMUNICATIONS AND COORDINATION OF MESSAGING WITH MEMBER AGENCIES, TAILORED TO LARGE AND SMALL AGENCY NEEDS









MWDOC presently develops, coordinates, and delivers a substantial number of programs and services aimed at elevating stakeholders' awareness about water policy, efficient water use, and MWDOC's role in advocating for sound policy and water reliability investments that are in the best interest of Orange County.

Over the past decade, there has been a significant shift in the way people receive information. The media market is overcrowded and constantly evolving. The public is bombarded minute by minute with news from their phones, televisions, computers, and tablets. Traditional media has been on the decline and at the same time, digital media continues to explode. Water providers must prove themselves to be relatable, trustworthy, and essential. This is accomplished by communicating more frequently and more effectively using a wide array of tools and channels to meet the needs and interests of an extremely diverse demographic. As no single communications tool or channel can fulfill all MWDOC's identified goals and objectives, a holistic approach has been taken, utilizing all the tools in the toolbox to create a compounding and inclusive impact.

Initial goals for *Communication* identified to help meet this Board Strategic Priority are:








- a) Update to the District's Strategic Communications Plan to align with the Board Strategic Priorities
- b) Solicit input and create opportunities that benefit Orange County's water future
- c) Explore the creation of a MWDOC "Ambassador Program" to educate upcoming leaders
- d) Strengthen communications and coordination of messaging with member agencies, tailored to large and small agency needs

Goal: Update to the District's Strategic Communications Plan to align with the Board Strategic Priorities









Action	<p>Board discussion on updating the District's Strategic Communications Plan</p> <p>Example:</p> <ul style="list-style-type: none"> • Workshop format to identify objectives and direction for staff in all areas of MWDOC communications & outreach efforts • Meet with PIOs and member agencies to identify small/large agency needs
Key Audience	MWDOC Board and member agencies
Timing/Frequency	Commence Q2 or Q3 with expectations to be completed within Fiscal Year 2023-2024
Key Department(s)	<div>         </div> <div> <p>Water Use Efficiency</p> <p>WEROC</p> <p>Gov. Affairs</p> <p>Public Affairs</p> <p>MET Issues</p> <p>Eng. & Planning</p> <p>Human Resources</p> <p>Finance & IT</p> </div>
Resources (if needed)	Based on direction from the Board

Strategic communication is an ongoing activity; therefore, MWDOC's Strategic Communications Program and Plan is a living document to implement effective, relevant communication with timeliness and accuracy. This document serves as a blueprint, establishing a baseline understanding for how MWDOC's programs will provide information and value to its various stakeholders, partners, and employees; and support MWDOC's mission, goals, and objectives to secure long term water reliability for the region.

Goal: Solicit input and create opportunities that benefit Orange County's water future

Action	<p>Explore effective mechanisms to solicit feedback from member agencies and relevant stakeholders on what they need for communication collateral</p> <p>Example:</p> <ul style="list-style-type: none"> • Meet with Public Information Officers and General Managers to identify small/large agency needs • Solicit annual feedback on the effectiveness of MWDOC's communications activities and support • Expand digital media platforms to highlight MWDOC program and activities, member agencies' achievements, and partnerships
Key Audience	MWDOC Board and member agencies
Timing/Frequency	Monthly, annually, and align with key decisions/actions at MWDOC
Key Department(s)	<div>        </div> <div> <p>Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources</p> </div>
Resources (if needed)	None identified at this time









Goal: Explore the creation of a MWDOC “Ambassador Program” to educate upcoming leaders

Action	<p>Explore the creation of a MWDOC Pilot “Ambassador Program” to educate upcoming leaders</p> <p>Purpose:</p> <ul style="list-style-type: none"> Identify key water related topics to increase the awareness of MWDOC and its services To provide a greater understanding of role in the county in the areas of water reliability planning, member agency support, advocacy, and Metropolitan issues. <p>Aligns the Strategic Priority #1, MWDOC’s Role & Responsibility</p> <p>Aligns the Strategic Priority #4, Reliability Planning</p>
Key Audience	Non-water appointed and elected leaders within MWDOC’s service area
Timing/Frequency	In Q4 bring to the Board an outline of a Pilot “Ambassador Program” including topics, activities, and budget
Key Department(s)	<div>         </div> <div> <p>Water Use Efficiency</p> <p>WEROC</p> <p>Gov. Affairs</p> <p>Public Affairs</p> <p>MET Issues</p> <p>Eng. & Planning</p> <p>Human Resources</p> <p>Finance & IT</p> </div>
Resources (if needed)	Align with annual budget process

The creation of an Ambassador Program has the purpose of fostering future advocates for MWDOC with a strategic initiative to enhance the organization's visibility, relevance, and community engagement. To make this program effective it will focus on key water-related topics, MWDOC's mission, programs, and services, by communicating this information to non-water appointed and elected leaders within MWDOC’s service area.

The Ambassador Program is intended to incorporate engaging and interactive activities, such as member agency site visits, key issue workshops, and guest speakers, into the program curriculum. The program could culminate at the MWDOC Policy Dinner, with recognition of each year’s ambassadors. A motivating factor of the program is to create the opportunity to share MWDOC’s relevance, knowledge, and experiences with a broader audience. This approach will help create a network of informed advocates who can effectively communicate MWDOC's mission and contributions to the community, increasing the organization's relevance and impact within Orange County.

Goal: Strengthen communications and coordination of messaging with member agencies, tailored to large and small agency needs

Action	<p>Explore alternative formats to solicit feedback from varied member agencies</p> <p>Example</p> <ul style="list-style-type: none"> • Semi-annual small agency forum with staff • Identify common needs for opportunities to benefit the service area among the member agencies <p>Aligns with Strategic Priority #5. Member Agency Collaborations</p>
Key Audience	Member agencies
Timing/Frequency	1-2 times per year
Key Department(s)	<div>         </div> <div> <p>Water Use Efficiency</p> <p>WEROC</p> <p>Gov. Affairs</p> <p>Public Affairs</p> <p>MET Issues</p> <p>Eng. & Planning</p> <p>Human Resources</p> <p>Finance & IT</p> </div>
Resources (if needed)	None identified at this time



7. STAFF DEVELOPMENT

INVEST IN WORKFORCE DEVELOPMENT AND SUCCESSION PLANNING TO CONTINUOUSLY STRENGTHEN AND RENEW MWDOC'S STAFF CAPABILITIES

MWDOC is known for its highly skilled staff and quality of work. To attract and retain an excellent workforce, provide a work environment where learning and development is encouraged and maintain an environment of teamwork, collaboration and employee engagement, we will need to be thoughtful and strategic in how we invest in our employees.

Through staff development, MWDOC can ensure that its staff remains current with the latest industry trends, technologies, and best practices. This not only enhances the overall efficiency and effectiveness of the organization but also enables it to adapt to evolving challenges and opportunities in the water industry. For the size of MWDOC's total staff and role and responsibility each staff member is charged with makes it essential that we invest in this Board priority.









Succession planning is crucial for MWDOC to secure its long-term viability. As experienced employees retire or move on to new opportunities, there is a risk of losing valuable institutional knowledge and leadership. By proactively identifying and preparing internal talent for key roles, MWDOC can bridge these knowledge gaps and maintain continuity in leadership. This not only saves time and resources that would otherwise be spent solely on external recruitment, but also ensures a smooth transition of responsibilities, preserving the organization's institutional memory and culture. Ultimately, investing in workforce development and succession planning is an investment in the future sustainability and competitiveness of MWDOC.

Initial goals for *Staff Development* identified to help meet this Board Strategic Priority are:

- a) Ensure that MWDOC appropriately provides workforce development opportunities to best serve the community and mission
- b) Strengthen communication on organization's institutional knowledge and culture
- c) Outline a schedule for Departmental "Needs Assessments"
- d) Develop a "Succession Plan" for MWDOC









7. STAFF DEVELOPMENT

Goal: Ensure that MWDOC appropriately provides workforce development opportunities to best serve the community and mission









Action	<p>Create an environment of teamwork and collaboration where employee learning and development is encouraged</p> <p>Example:</p> <ul style="list-style-type: none"> Employee incentive program for workforce development and training Lunch and learn for entry and journey level employees Senior management participation in appropriate level trainings and classes
Key Audience	MWDOC staff
Timing/Frequency	1-2 times per year
Key Department(s)	<div>  Water Use Efficiency  WEROC  Gov. Affairs  Public Affairs  MET Issues  Eng. & Planning  Human Resources  Finance & IT </div>
Resources (if needed)	Outside training resources as identified by Human Resources, MWDOC management, and staff



Goal: Strengthen communication on organization's institutional knowledge and culture









Action	<p>Evaluate current onboarding process and expand in areas where needed to ensure employees are aware of District policies and procedures and have all the resources available to them in order to succeed</p> <p>Example:</p> <ul style="list-style-type: none"> • Peer-to-Peer Program • Implement a welcome to MWDOC Orientation • Implement a new hire welcome package • "Stay" interviews with existing employees
Key Audience	New Hires/Department Heads/Managers/Supervisors
Timing/Frequency	Completed end of the year of Fiscal Year
Key Department(s)	<div>         </div> <div> <p>Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources Finance & IT</p> </div>
Resources (if needed)	None identified at this time

Goal: Outline a schedule for Departmental "Needs Assessments"

Action	<p>Identify areas of improvement, resource allocation, and strategic planning the organization through departmental assessments</p> <p>Examples:</p> <ul style="list-style-type: none"> • Develop action plans for each department to address their specific needs • Assess means for enhanced inter-departmental collaboration
Key Audience	Management and staff
Timing/Frequency	TBD
Key Department(s)	        <p>Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources Finance & IT</p>
Resources (if needed)	Resources identifies (e.g., staffing, training, technology, etc.) to be included in the annual budget process to support the departmental improvements

Conducting departmental "Needs Assessments" enhances the efficiency and effectiveness of an organization. This action will help to Identify areas of improvement, resource allocation, and strategic planning within MWDOC, and within each individual department. The schedule for conducting these assessments can vary depending on the department's size, complexity, and specific needs.

Goal: Develop a "Succession Plan" for MWDOC

Action	<p>Succession planning needs assessment to ensure that proper planning is in place as key positions retire</p> <p>Examples:</p> <ul style="list-style-type: none"> • Evaluate all positions – what are the critical positions? • Cross training opportunities • Establish growth opportunities (retain staff and succession planning) • Identify positions that will require recruitment efforts and establish overlap and transition timeline (9-12 months)
Key Audience	Management and staff
Timing/Frequency	Upon completion of initial assessment to be reviewed annually.
Key Department(s)	<div>         </div> <div> Water Use Efficiency WEROC Gov. Affairs Public Affairs MET Issues Eng. & Planning Human Resources Finance & IT </div>
Resources (if needed)	Human Resources, Department Heads, Managers and Supervisors and Outside resources as determined by Human Resources

