

# Templeton

COMMUNITY SERVICES DISTRICT *California*



2020-2023

## STRATEGIC PLAN



*Fostering a Spirit of Community Pride*  
Sustaining a Vibrant Future for Templeton

# **Templeton Community Services District**

## **2020 – 2023 Strategic Plan**

Adopted by the Board of Directors

May 5, 2020

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# CONTENTS

<b>Introduction.....</b>	<b>1</b>
Introduction.....	2
Executive Summary.....	3
<b>Organizational Profile.....</b>	<b>6</b>
Mission.....	7
Core Values.....	8
<b>The Future.....</b>	<b>9</b>
Vision.....	10
Strategic Goals.....	11
<b>Strategic Paths.....</b>	<b>12</b>
Core Strategies.....	13
<b>Performance Measurement.....</b>	<b>17</b>
Key Performance Indicators.....	18
Evaluation & Corrective Action.....	22
<b>Strategy Execution.....</b>	<b>26</b>
Strategic Priorities.....	27
Staff Action Plan.....	28
<b>Appendices.....</b>	<b>29</b>
Templeton Community Services District SWOT Analysis.....	30
Templeton Community Services District Budget.....	35

# **Introduction**

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Introduction

Executive Summary

## **INTRODUCTION**

At the Templeton Community Services District (TCSD), strategic planning is more than just a process that culminates in a plan . . . it is one element of a comprehensive strategic management function woven into the fabric of the District's day-to-day operations. Against a backdrop of developing the plan document, the TCSD strategic management function begins with strategic thinking that results in a long term vision for the ideal future of the District. That vision consists of a number of broad outcomes (strategic goals), each supported by core strategies that achieve those outcomes. Measurable objectives are defined to achieve each core strategy and are tracked and reported monthly relative to success benchmarks called key performance indicators. Throughout the year the degree to which the objectives are being successfully addressed is consistently evaluated and corrective action is taken, if needed. Each year, the outcomes are evaluated for continuing relevancy and the strategies leading to those outcomes are revised and updated relative to changes in the District's internal strengths and weaknesses, opportunities, and threats (challenges).

Less about a document, and more about the vision that is at the heart of that document, the District's Strategic Plan is the very definition of what success means for TCSD and of how that success will be approached and achieved.

## EXECUTIVE SUMMARY

The Templeton Community Services District (TCSD) 2020-2023 Strategic Plan consists of **six primary components**. The District **Mission** and **Core Values** are the foundation upon which the Plan is built. The TCSD Mission articulates the job that District staff arrives at work each day to perform, and defines the value that work provides to those living and working and going to school in the District. Six Core Values identify the guiding principles that shape the decisions and the actions of the Directors and the staff as they conduct the affairs of TCSD each day.

Fifteen primary outcomes (**Strategic Goals**) collectively comprise the District's **Vision**, which describes what TCSD will look like in 2023 as defined by the Board and District management. Those goals include closing the Parks & Recreation Department deficit and evaluating park maintenance, completing projects allowing for the full percolation and retrieval of 100% of the wastewater effluent, developing an updated master plan for Fire & Emergency Services and a plan for the full Nacimiento allocation percolation, as well as improving TCSD wastewater source control and further developing the Integrated Water Resources Strategic Plan (IWRSP). Other Strategic Goals include fully staffing and funding 24/7 Fire & Emergency Services, ensuring that all District operating costs and capital projects are fully funded in advance, attracting and retaining a stable and highly-qualified workforce, ensuring that all areas of TCSD operations meet or *exceed* regulatory standards, and maintaining ongoing collaboration with governmental agencies and local organizations to look for ways to deliver enhanced services to the Templeton community.

Successful (or unsuccessful) progress toward achieving each of the Strategic Goals in the Vision is quantified and benchmarked by **Key Performance Indicators (KPI's)**. A diverse set of twenty nine KPI's provides success objectives for the fifteen Strategic Goals. Some Goals are quantified by just one KPI, while others may have as many as three KPI's measuring various aspects of their success.

Several of the Key Performance Indicators measure water and wastewater goals such as full percolation and retrieval of wastewater effluent, the degree to which industrial dischargers and food service businesses comply with wastewater standards, and the reduction of wastewater odor complaints from the community. Parks & Recreation KPI's deal with budget increases and evaluating options to improve park maintenance, while Fire & Emergency Services KPI's track the hiring of a new fire chief and other key full-time personnel and the completion of the Fire & Emergency Services master plan. Administrative Key Performance Indicators include the timing of a water & sewer rate review, collaborative meetings with area governmental agencies, the annually-adjusted staff turnover rate, and development of a process for capturing legacy knowledge from tenured staff members. Other KPI's track the District's involvement in community events and activities.

## **EXECUTIVE SUMMARY . . . CONTINUED**

Sixty **Core Strategies** support the TCSD Vision and provide paths leading to the achievement of the fifteen Strategic Goals in the Vision. Among the Core Strategies are further development of the Integrated Water Resources Strategic Plan (IWRSP) that quantifies water supplies, identifies key actions, and develops policies to serve current and future needs.

Wastewater strategies include ensuring that all of the District's wastewater effluent is treated and discharged, and implementing wastewater source discharge control and permitting to enforce restrictions on what industrial dischargers and food service businesses can put into their wastewater. Controlling the odor from the wastewater collection system and correcting incomplete wastewater treatment are among other strategies the District is focused on.

Delivering an improvement plan for Evers Park, continuing to involve volunteers in providing valuable assistance in various Parks & Recreation programs, an updated master plan for Fire & Emergency Services, and implementing a 24/7 staffing plan as funding from the passage of Measure A becomes available are also among the strategies supporting the District Vision in the Strategic Plan.

Maintaining ongoing collaborative relationships with the Templeton Unified School District, San Luis Obispo County and the Cities of Atascadero and Paso Robles, and with Atascadero Mutual Water Company and the Chamber of Commerce are important to the District's future and are also included in the Plan.

While not a part of the Strategic Plan document, a **Tactical Action Plan (TAP)** developed by TCSD staff with direction from the Board is nevertheless an integral component of the District's strategic planning process. The TAP contains the specific steps that will be taken to accomplish each Core Strategy, and is therefore the primary driver of the execution – and ultimate success – of the Strategic Plan.

Although the Tactical Action Plan is the sixth and final major component of the planning process, other documents, tools, and templates are important in the development and execution of the TCSD Strategic Plan. The most important of those is a part of the Plan document. An **Evaluation & Corrective Action** process that provides a step-by-step format for evaluating stalled Core Strategies and Tactical Action Steps, and for determining the proper corrective action needed to stimulate progress and success, is a part of the Plan.

## **EXECUTIVE SUMMARY . . . CONTINUED**

The Appendices of this Strategic Plan include a listing of the key **strengths** and **weaknesses** of the District, and of the key **opportunities** and **threats (challenges)** that may confront TCSD in the future. These strengths, weaknesses, opportunities, and threats (challenges) played an important role in the development of the Core Strategies.

The District's **Operating Budget** is cited in the Appendices because it is an important part of the TCSD planning process. However, in the interest of keeping this Strategic Plan to a manageable size, the actual budget document is not included in the Appendices (but is available on the District website).

# Organizational Profile

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Mission

Core Values

## **MISSION**

The Templeton Community Services District's (TCSD) Mission is a statement that succinctly defines the reason the District exists, the community it serves and the value it delivers to that community. The Mission statement received minor revision during the Board's 2020-2023 strategic planning process, which occurred between January and March 2020. The revision replaced the word "residents" with "community" to include those who work in Templeton, but reside in a neighboring city.

The revised Mission statement, formally adopted by the Templeton Community Services Board of Directors on May 5, 2020:

***The Templeton Community Services District Mission  
is to provide the community with  
water, sewer, fire, parks & recreation, refuse, lighting, and drainage  
services with the highest possible degree of  
cost effectiveness, efficiency, and customer service.***

## **CORE VALUES**

The Core Values of the Templeton Community Services District (TCSD) represent the beliefs, philosophies, norms, standards, and principles that guide both the policies and procedures of the District and the behaviors and decisions of its Directors, staff, agents, and contractors.

Core Values are enduring and constant and reflect the organizational culture desired by the Board of Directors and the General Manager. The Core Values of the Templeton Community Services District were developed during the District's 2020-2023 strategic planning process, and were formally adopted May 5, 2020:

### **Customer Focus**

*We are driven by a personal desire to fulfill the District's mission, concentrating our efforts and attention on meeting the needs of the community we serve.*

### **Knowledge**

*We actively seek information, ideas, and principles, and use them to improve processes, solve problems and create opportunities to better meet the needs of those we serve.*

### **Resourcefulness**

*As stewards of limited resources, we are cautious, prudent, and creative in our allocation of time, staff, and finances to do the work of the District.*

### **Respect**

*We value the abilities, qualities, and achievements of others, and enjoy the same from them.*

### **Teamwork**

*We are collaborative and actively assist our co-workers in completing the District's work, with the desired results.*

### **Transparency**

*We believe clarity, honesty and openness are essential ingredients in earning the confidence and trust of those we serve.*

# The Future

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Vision

Strategic Goals

## VISION

Vision is foresight . . . the picture the Board of Directors and the General Manager see as their view of the ideal future for the Templeton Community Services District. Their Vision is unique to the needs of the community the District serves and the facilities and properties it manages, and is therefore likely to be different from the Vision of Directors of other community services districts in California. The component parts of the Vision articulate the specific ways in which TCSD intends to fulfill its Mission (purpose) during the three years beginning July 1, 2020. The Templeton Community Services District Vision was developed by the Board of Directors on February 29 during the District's 2020-2023 strategic planning process, and was formally adopted by the Board on May 5, 2020:

**On June 30, 2023**, the Board of Directors, and the staff of the Templeton Community Services District (TCSD) continue to regularly demonstrate a commitment to the Mission of the District, and actively foster the spirit of community pride that is central to sustaining a vibrant future for Templeton. TCSD has a three-year Strategic Plan and regularly tracked progress toward achieving the District Vision by today, June 30, 2023.

Fully funded and staffed fire protection and emergency services are provided to the community 24/7, guided by a new Master Plan. Funding support for the facilities and programs of the Parks & Recreation Department has been increased, the Department's deficit has been closed, and improved park maintenance meets the recreational needs of the community.

Projects have been completed that allow for the full percolation and retrieval of 100% of the wastewater effluent, and a plan has been developed and is being initiated for the full Nacimiento allocation percolation. TCSD wastewater source control has been improved.

All areas of TCSD operations meet or exceed regulatory standards and the District operates under sound financial management to ensure all operating costs and future capital projects are fully funded. TCSD retains a highly-qualified and stable workforce, and ongoing collaboration with other governmental agencies offers potential opportunities for the District to deliver enhanced services to the community.

The TCSD Board of Directors deliberates on District matters with a model of decorum and all Board members support the final outcomes of those deliberations. All members understand that the Board is a team and that individual perspectives and opinions of fellow Board members are crucial to the success of the team.

## **STRATEGIC GOALS**

Strategic Goals are the broad-based outcomes expressed in the Templeton Community Services District's Vision for June 30, 2023. These outcomes are the ultimate accomplishment of the Core Strategies in the District's Strategic Plan and are the definition of what success means to the TCSD Board and staff on a day-to-day basis as they serve those who live and work within the District's boundaries. The Strategic Goals appearing below (in no order) were identified by the TCSD Board of Directors on February 29, 2020 and became the content used to draft the District Vision.

- **Enhance reliability and availability of water resources**
- **Develop a plan for full Nacimiento allocation percolation.**
- **Complete projects that allow for the full percolation and retrieval of 100% of the wastewater effluent.**
- **Improve TCSD wastewater source control.**
- **Ensure that all areas of TCSD operations meet or exceed regulatory standards.**
- **Increase funding support for the facilities and programs of the Parks & Recreation Department, and close the Department deficit.**
- **Improve Parks & Recreation Department maintenance to meet the recreational needs of the community.**
- **Provide fully funded and staffed Fire & Emergency Services to the community 24/7.**
- **Create a new Fire & Emergency Services master plan.**
- **Operate TCSD under sound financial management to ensure all operating costs and future capital projects are fully funded.**
- **Collaborate regularly with other governmental agencies and local organizations to create opportunities for TCSD to deliver enhanced services to the community.**
- **Retain a highly-qualified and stable TCSD workforce.**
- **Ensure continuity of the District's legacy expertise into the future.**
- **Develop a TCSD strategic plan and regularly track progress toward achieving the District Vision by June 30, 2023.**
- **The TCSD Board and staff regularly foster the spirit of community pride that is central to sustaining a vibrant future for Templeton.**

# Strategic Paths

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Core Strategies

## CORE STRATEGIES

Core Strategies are proactive action statements that describe the paths to achieving the desired outcomes (Strategic Goals) that collectively comprise the TCSD Vision. Core Strategies are shaped by the District's strengths, weaknesses, opportunities, and threats (challenges). The Templeton Community Services District Core Strategies appear on pages 13-16. They were adopted by the Board of Directors on May 5, 2020.

**WATER STRATEGIC GOAL: Enhance reliability and availability of water resources.** This strategy leads to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Build upon and further develop the Integrated Water Resources Strategic Plan that quantifies supplies, identifies key actions, and develops needed policies to serve current and future needs (including options and plan for infrastructure to use Nacimiento water)

**WATER STRATEGIC GOAL: Develop a plan for full Nacimiento allocation percolation.** This strategy leads to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Define the methodology and action steps necessary to achieve full Nacimiento allocation percolation.

**WASTEWATER STRATEGIC GOAL: Complete projects that allow for the full percolation and retrieval of 100% of the wastewater effluent.** These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Complete the Wastewater Discharge Feasibility Evaluation
- **CORE STRATEGY:** Conduct pilot testing
- **CORE STRATEGY:** Complete phased installation

**WASTEWATER STRATEGIC GOAL: Improve TCSD wastewater source control.** These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Prioritize and implement wastewater source discharge/permitting, including Fats, Oils and Greases (FOG) and industrial discharge limits
- **CORE STRATEGY:** Ensure all of the District's effluent is treated and discharged
- **CORE STRATEGY:** Identify, address, and improve Inflow and Infiltration (I&I) problem areas

## **CORE STRATEGIES . . . CONTINUED**

**COMPLIANCE STRATEGIC GOAL:** Ensure that all areas of TCSD operations meet or exceed regulatory standards. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Control odor in the wastewater collection system
- **CORE STRATEGY:** Correct incomplete wastewater treatment
- **CORE STRATEGY:** Improve the sustainability and energy efficiency of the Wastewater Treatment Plant

**PARKS & RECREATION STRATEGIC GOAL:** Increase funding support for the facilities and programs of the Parks & Recreation Department, and close the Department deficit. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Sustain financial support for special events and youth sports
- **CORE STRATEGY:** Continue funding stream from solid-waste franchise fees
- **CORE STRATEGY:** Actively pursue available grants to partially fund Department programs
- **CORE STRATEGY:** Deliver Evers Park Improvement Plan
- **CORE STRATEGY:** Examine alternatives to reduce the Department's water bill and other operational costs

**PARKS & RECREATION STRATEGIC GOAL:** Improve Parks & Recreation Department maintenance to meet the recreational needs of the community. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Continue to actively identify and utilize community volunteers to assist in operating the Department's programs and in handling administrative office tasks
- **CORE STRATEGY:** Ensure that increased staffing includes improving park maintenance

**FIRE & EMERGENCY SERVICES STRATEGIC GOAL:** Provide fully funded and staffed Fire & Emergency Services to the community 24/7. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** As funding from Measure A is available, implement 24/7 staffing plan
- **CORE STRATEGY:** Explore cost recovery through third party billing for services delivered, such as emergency services to residents outside Templeton, fire insurance coverage and assists

## **CORE STRATEGIES . . . CONTINUED**

**FIRE & EMERGENCY SERVICES STRATEGIC GOAL:** Create a Fire & Emergency Services master plan. This Strategy leads to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Circulate a Request for Proposals (RFP) from firms known to provide fire department master plans

**FINANCE STRATEGIC GOAL:** Operate TCSD under sound financial management to ensure all operating costs and future capital projects are fully funded. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Develop long term approach to TCSD's financial needs with effective policies to fund the District's service delivery
- **CORE STRATEGY:** Submit a balanced budget for each fiscal year
- **CORE STRATEGY:** Review the Strategic Financial Policies annually
- **CORE STRATEGY:** Monitor water and sewer rates every five years to ensure that revenue is sufficient to meet operating and capital needs in those areas

**PARTNERSHIPS STRATEGIC GOAL:** Collaborate regularly with other governmental agencies and local organizations to create opportunities for TCSD to deliver enhanced services to the community. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Maintain ongoing collaboration with Templeton Unified School District
- **CORE STRATEGY:** Maintain ongoing collaboration with San Luis Obispo County
- **CORE STRATEGY:** Maintain ongoing collaboration with the City of Paso Robles
- **CORE STRATEGY:** Maintain ongoing collaboration with the City of Atascadero
- **CORE STRATEGY:** Maintain ongoing collaboration with Atascadero Mutual Water Company
- **CORE STRATEGY:** Network with Templeton Chamber of Commerce and other community groups to identify potential collaboration opportunities

**STAFF STRATEGIC GOAL:** Retain a stable TCSD workforce. These Strategies lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Evaluate the recommendations of the compensation study
- **CORE STRATEGY:** Identify ways to reduce the increasing cost of recruitment and training

## **CORE STRATEGIES . . . CONTINUED**

**STAFF STRATEGIC GOAL:** Ensure continuity of the District’s legacy expertise into the future. This Strategy leads to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Codify and transfer knowledge of key tasks and processes as part of succession planning

**STRATEGIC PLANNING STRATEGIC GOAL:** Develop a TCSD strategic plan and regularly track progress toward achieving the District vision by June 30, 2023. The Strategies below lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Strategic Plan is reviewed annually by the Board to ensure the continuing relevance of the District Vision and Core Strategies
- **CORE STRATEGY:** District progress toward implementing/achieving the Core Strategies is reviewed quarterly by the Board and corrective action is taken, if necessary

**COMMUNITY STRATEGIC GOAL:** The TCSD Board and staff regularly foster the spirit of community pride that is central to sustaining a vibrant future for Templeton. The Strategies below lead to fulfillment of this Strategic Goal:

- **CORE STRATEGY:** Maintain District presence at key community events (July 4<sup>th</sup>, Founders Day, Wine Festival)
- **CORE STRATEGY:** Link the District’s identity with the community’s identity
- **CORE STRATEGY:** Provide support services at community events
- **CORE STRATEGY:** Invite the public to District Open House events (Fire Station, Boardroom)
- **CORE STRATEGY:** TCSD Board members maintain community visibility

# Performance Measurement

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Key Performance Indicators

Evaluation & Corrective Action

## KEY PERFORMANCE INDICATORS

Templeton Community Services District's successful progress toward achieving the Strategic Goals in the District Vision. Since the Vision itself is the "definition of success" for TCSD, Key Performance Indicators (KPI's) measure what is most important to the District. They were developed during the District's 2020-2023 strategic planning process and adopted by the Board of Directors on May 5, 2020. The Key Performance Indicators that measure performance progress toward achievement of the Strategic Goals in the Templeton Community Services District Vision are:

**WATER STRATEGIC GOAL:** Enhance reliability and availability of water resources.

■ **KEY PERFORMANCE INDICATOR:**

Complete the development of the Integrated Water Resources Strategic Plan (IWRSP) by 6-30-23

**WATER STRATEGIC GOAL:** Develop a plan for full Nacimiento allocation percolation.

■ **KEY PERFORMANCE INDICATOR:**

Plan completed and permitted by the State of California by 6-30-23

**WASTEWATER STRATEGIC GOAL:** Complete projects that allow for the full percolation and retrieval of 100% of the wastewater effluent.

■ **KEY PERFORMANCE INDICATOR:**

Full percolation & retrieval of 90% of wastewater effluent is achieved by 6-30-21

■ **KEY PERFORMANCE INDICATOR:**

Full percolation & retrieval of 95% of wastewater effluent is achieved by 6-30-22

■ **KEY PERFORMANCE INDICATOR:**

Full percolation & retrieval of 100% of wastewater effluent is achieved by 6-30-23

**WASTEWATER STRATEGIC GOAL:** Improve TCSD wastewater source control.

■ **KEY PERFORMANCE INDICATOR:**

All industrial dischargers and existing food service businesses have obtained an Industrial or Food Service Permit

■ **KEY PERFORMANCE INDICATOR:**

Each year, all permitted facilities are inspected and provided with related source control educational material

## KEY PERFORMANCE INDICATORS . . . CONTINUED

**COMPLIANCE STRATEGIC GOAL:** Ensure that all areas of TCSD operations meet or exceed regulatory standards.

■ **KEY PERFORMANCE INDICATOR:**

Reduce wastewater odor complaints by 50% in FY 2020-2021 over FY 2019-2020

■ **KEY PERFORMANCE INDICATOR:**

Biochemical Oxygen Demand limits do not exceed 100 Max and 50 Mean

**PARKS & RECREATION STRATEGIC GOAL:** Increase funding support for the facilities and programs of the Parks & Recreation Department, and close the Department's deficit.

■ **KEY PERFORMANCE INDICATOR:**

Adopt a balanced Parks & Recreation budget for Fiscal Year 2020-2021

■ **KEY PERFORMANCE INDICATOR:**

Adopt a balanced Parks & Recreation budget for Fiscal Year 2021-2022

■ **KEY PERFORMANCE INDICATOR:**

Adopt a balanced Parks & Recreation budget for Fiscal Year 2022-2023

**PARKS & RECREATION STRATEGIC GOAL:** Improve Parks & Recreation Department maintenance to meet the recreational needs of the community.

■ **KEY PERFORMANCE INDICATOR:**

Explore options for improving park maintenance and make recommendations to the Board by 6-30-21

**FIRE & EMERGENCY SERVICES STRATEGIC GOAL:** Provide fully funded and staffed Fire & Emergency Services to the community 24/7.

■ **KEY PERFORMANCE INDICATOR:**

Implement cost recovery program, if deemed viable, by 6-30-23

■ **KEY PERFORMANCE INDICATOR:**

Hire a full-time fire chief, an additional full-time fire captain and a full-time engineer by 12-31-20

■ **KEY PERFORMANCE INDICATOR:**

Implement 24/7 staffed coverage during Fiscal Year 2020-2021

**FIRE & EMERGENCY SERVICES STRATEGIC GOAL:** Create a Fire & Emergency Services master plan.

■ **KEY PERFORMANCE INDICATOR:**

The Fire & Emergency Services master plan is completed by 12-31-21

## KEY PERFORMANCE INDICATORS . . . CONTINUED

**FINANCE STRATEGIC GOAL:** Operate TCSD under sound financial management to ensure all operating costs and future capital projects are fully funded.

■ **KEY PERFORMANCE INDICATOR:**

District purchasing policies are updated by 6-30-21

■ **KEY PERFORMANCE INDICATOR:**

Conduct water & sewer rate review by 6-30-23

**PARTNERSHIPS STRATEGIC GOAL:** Collaborate regularly with other governmental agencies and local organizations to create opportunities for TCSD to deliver enhanced services to the community.

■ **KEY PERFORMANCE INDICATOR:**

District meets collaboratively with each designated agency at least twice annually

■ **KEY PERFORMANCE INDICATOR:**

General Manager reports to the Board monthly on the state of ongoing collaboration

**STAFF STRATEGIC GOAL:** Retain a highly-qualified and stable TCSD workforce.

■ **KEY PERFORMANCE INDICATOR:**

District staff turnover does not exceed one full-time-equivalent per fiscal year

■ **KEY PERFORMANCE INDICATOR:**

100% of the staff is currently pursuing continuing education relative to their District role, or is pursuing (or has already earned) a professional certification

**STAFF STRATEGIC GOAL:** Ensure continuity of District's legacy expertise into the future.

■ **KEY PERFORMANCE INDICATOR:**

Key positions anticipating a retirement are identified by 12-31-20

■ **KEY PERFORMANCE INDICATOR:**

Process for capturing legacy knowledge and expertise developed by 12-31-20

**STRATEGIC PLANNING STRATEGIC GOAL:** Develop a TCSD strategic plan and regularly track progress toward achieving the District Vision by June 30, 2023.

■ **KEY PERFORMANCE INDICATOR:**

Strategic Plan content is reviewed and updated annually prior to the end of the Fiscal Year

■ **KEY PERFORMANCE INDICATOR:**

Key Performance Indicators are reviewed by the Board quarterly, and appropriate corrective action is taken if necessary

## **KEY PERFORMANCE INDICATORS . . . CONTINUED**

**COMMUNITY STRATEGIC GOAL:** The TCSD Board and staff regularly foster the spirit of community pride that is central to sustaining a vibrant future for Templeton.

■ **KEY PERFORMANCE INDICATOR:**

The District has a visible presence at 4 key community events a year

■ **KEY PERFORMANCE INDICATOR:**

District programs/objectives are promoted at 3 Concerts in the Park each summer

## **EVALUATION & CORRECTIVE ACTION**

In addition to tracking and reporting progress toward successfully executing the Strategic Goals and Core Strategies in the 2020-2023 TCSD Strategic Plan, the District evaluates that progress on an ongoing basis and takes appropriate corrective action, as necessary.

From time to time, progress will not occur at the pace stated in the Strategic Plan – or may stall altogether – and immediate attention will be required of the Board of Directors and/or District staff. The Evaluation / Corrective Action Process outlined below provides TCSD a structured and consistent evaluation process that identifies the specific problem(s), potential solution(s), and appropriate corrective action(s) that will jumpstart or redirect stalled progress.

# EVALUATION & CORRECTIVE ACTION

## The Basics

Which Strategic Goal is in need of Corrective Action?

Which Core Strategy is in need of Corrective Action, if any?

What is the deadline for completion of the final Action Step for this Core Strategy?

Is the current health of this Core Strategy classified as Yellow or Red? What is the rationale for this classification?

## The Problem

Circle one or more of the issues below that describe the reason(s) why the health of this Core Strategy is considered to be either Yellow or Red, and add appropriate details:

- Adequate resources are not available (time, staff, dollars, tools, etc.)
- This Core Strategy is no longer an appropriate or necessary part of achieving the TCSD Vision
- This Core Strategy is no longer deemed to be a strategic priority by the Board
- The Action Steps supporting this Core Strategy do not completely or appropriately contribute to completion of the Core Strategy
- Progress has stalled because it depends on as-yet-undelivered work product / assistance from another District employee, a person outside the District, or another organization
- Accountable staff is not an appropriate match for the Core Strategy and/or particular Action Steps
- Deadline(s) for one or more Action Steps are unrealistic because of the nature or the volume of work required
- Unforeseen internal District issues stymied progress on one or more Action Steps
- Unforeseen external issues (the economy, legislative or regulatory action, technology, etc.) stymied progress on one or more Action Steps
- Another reason? \_\_\_\_\_

## EVALUATION & CORRECTIVE ACTION . . . CONTINUED

### The Solution

Circle the *one* solution below that you feel is the preferred course of action in addressing the issue(s) you raised on the previous page.

- Discontinue work on the Core Strategy or Action Step
- Continue work with a modified Core Strategy or Action Step
- Continue work with the existing Core Strategy or Action Step

If you selected the last course of action listed above, note why you chose that option. Why do you believe that course of action will support completion of the overall Core Strategy and all subordinate Action Steps on deadline? How would you propose to make up lost ground, in spite of the issues that you raised on the previous page?

### Corrective Action

Circle as many of the Corrective Actions listed below as you feel are necessary and appropriate to ensure that the Core Strategy and any impacted Action Steps will be completed on deadline and on budget. The Corrective Action(s) selected should support the optimum solution to the problem(s) identified on the previous page.

- Eliminate the Core Strategy in question from the 2020-2023 TCSD Strategic Plan
- Eliminate the Action Step(s) in question from the Staff Action Plan that supports the 2020-2023 TCSD Strategic Plan
- Modify the language of the Core Strategy in question to clarify/change/add/delete its meaning, content, intent, or Action Steps
- Modify the language of the Action Step(s) in question to redefine budget / resource commitments, staff accountability or deadline
- Include additional Action Steps in support of the Core Strategy in question
- Escalate requests for work product or assistance overdue from District staff or outside parties to senior people who can apply gentle pressure to get the needed work product or assistance to ensure continued progress on the Core Strategy
- Replace staff or outside parties accountable for the Core Strategy and/or Action Steps in question with an accountable party better suited/equipped to achieve the Core Strategy and complete the Action Step(s) on deadline and on budget

## EVALUATION & CORRECTIVE ACTION . . . CONTINUED

### Corrective Action . . . continued

- Adjust deadlines to more realistically reflect the time needed to complete the Strategy or Action Step in question. Adjust a particular deadline only once during the life of the Action Step.
- Draft a new Strategy or new Action Steps that reflect unforeseen District, marketplace, and industry issues, yet achieve the same progress intended of the original Strategy and/or Action Steps.

By what date will the selected course(s) of Corrective Action be undertaken?

Who is responsible for implementing the Corrective Action?

Who will make the appropriate revisions to the 2020-2023 TCSD Strategic Plan document, to the Staff Action Plan, and to the *Strategic Management Barometer*?

By what date will those revisions be made?

By what date will work begin on the revised Strategy and/or Action Step(s)?

Who will be doing that work?

# Strategy Execution

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Strategic Priorities

Staff Action Plan

## STRATEGIC PRIORITIES

Strategic Priorities are those elements of the Strategic Goals requiring immediate attention and focus because addressing them early – and effectively – is critical to successfully executing all of the Strategic Plan’s Core Strategies and realizing the TCSD Vision by June 30, 2023.

During fiscal year 2020/2021, the Board of Directors and the General Manager will focus on these Strategic Priorities (listed in no particular order of importance):

- **Enhance reliability and availability of water by ensuring full percolation and retrieval as water supply with economic benefits.** Treatment and compliance at the WWTP is the current focus, with post treatment filtration feasibility analysis on a parallel track.
- **Enhance reliability and availability of water by building upon, and further developing, the Integrated Water Resources Strategic Plan (IWRSP).** Quantify supplies, identify key actions, develop policies to serve current and future needs, and evaluate options to secure additional water resources (such as Nacimiento and permanent water conservation).
- **Ensure that all areas of TCSD operations meet or exceed regulatory standards.** Correct incomplete wastewater treatment through continuing consultation with wastewater expert and increased testing.
- **Implement a 24/7 staffing plan for Fire & Emergency Services.** Hire a fire chief, an additional full-time fire captain and a full-time engineer, and augment staffing with part-time firefighters.

## **TACTICAL ACTION PLAN**

The Tactical Action Plan (TAP) is a one-year roadmap that District staff will develop and use to organize their efforts toward the execution of the Core Strategies in the 2020-2023 TCSD Strategic Plan. Since the TAP is tactical in nature and is an internal tool used by staff to manage their efforts to achieve the Core Strategies, it is not included in this Strategic Plan document. Since it will be referenced by the General Manager as he develops content for his monthly management report to the Board, it is worthy of mention here.

The TAP will include a series of individual Action Steps for executing each of the Core Strategies that contribute to achieving the fifteen Strategic Goals in the TCSD Vision. Each Action Step will state the specific action to be performed, the timeline between the commencement and completion of work on the step, any resources needed to complete it, the person(s) accountable for completing it, and both the hard and soft costs necessary to complete it.

The Action Plan will be in development by District staff following approval of the 2020-2023 TCSD Strategic Plan by the Board of Directors. It will be completed in time to be used to manage the tactical execution of the Core Strategies during fiscal year 2020-2021. A new one-year plan will be developed prior to the beginning of each new fiscal year, until the Strategic Plan concludes on June 30, 2023.

# **Appendices**

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Templeton Community Services District  
SWOT Analysis

Templeton Community Services District  
Operating/Capital Budget

## **TEMPLETON CSD: SWOT ANALYSIS**

SWOT (Strengths / Weaknesses / Opportunities / Threats) is a situational analysis that identifies the internal strengths and weaknesses that impact TCSD, and the external opportunities and threats that potentially may confront the District. The SWOT analysis is often done in conjunction with a Current State Assessment of the organization's internal and external operating environments, and contributes significantly to the development of the strategy necessary to realize the TCSD Vision.

The Templeton Community Services District has a number of important strengths, weaknesses, opportunities, and threats that played a significant role in the development of the Core Strategies in this Strategic Plan. The TCSD Board of Directors identified the District's most important strengths, weaknesses, opportunities, and threats during the TCSD strategic planning process in February and March 2020 and they appear on pages 31-34.

## **TEMPLETON CSD: STRENGTHS**

Internal in nature, strengths are created, influenced, and/or controlled by District staff and management, and/or by the Board of Directors. Strengths are assets, competencies, resources, specialties, influences, and authorities that give TCSD the capacity, ability, and power to achieve success while pursuing fulfillment of the District Mission and Vision. The District strengths that follow were identified during the TCSD strategic planning process in February and March 2020 and appear in no specific order of importance.

### **Key Strengths Identified by the TCSD Board of Directors**

- **STAFF**
  - Knowledgeable, experienced, thorough, competent staff with broad range of skill sets, certifications, and abilities
  - Customer-focused staff builds goodwill in the community as the face of TCSD
  - Dedicated staff that responds quickly to meet customer needs in emergencies, and is willing to volunteer personal time to support the District
  
- **SERVICE DELIVERY & QUALITY**
  - Formal recognition for transparency from the California Special Districts Association
  - Reliability of the services we provide
  - Highly regarded Parks & Recreation Department
  
- **CULTURE**
  - Resourceful, frugal management culture leverages limited staffing and funding
  - General Manager models problem-solving as a valued core competency for every member of the staff
  - Low accident rates that reflect an emphasis on employee safety
  
- **DISTRICT RELATIONSHIPS**
  - Demonstrated community support for the District
  - Proactive Board and staff outreach to the community
  - Website capabilities enhance community engagement (i.e. Notify Me)
  - Established networking opportunities with other community services districts
  
- **BOARD OF DIRECTORS**
  - Diversity of Opinion

## TEMPLETON CSD: WEAKNESSES

Like strengths, weaknesses are internal in nature. They are created, influenced, and/or controlled by the District staff and management, and by the Board of Directors. Weaknesses are the shortcomings, limitations and inadequacies that result from the *absence* of the assets, competencies, resources, specialties, influences, and authorities that give Templeton Community Services District the capacity, ability, and power to achieve success while pursuing the fulfillment of the District Mission and Vision. The District weaknesses that follow were identified during the TCSD strategic planning process in February and March 2020, and appear in no specific order of importance.

### Key Weaknesses Identified by the TCSD Board of Directors

- **DISTRICT MISSION**
  - Lack of community awareness and understanding of some aspects of the District's role and scope of responsibilities
  
- **BOARD OF DIRECTORS**
  - Board dysfunction results in strife that diverts time and resources, and leads to an inability to provide clear and concise vision going forward, and to a lack of unity once Board decisions are made
  
- **STAFFING**
  - Lack of staff resources (people/time) to address new/additional projects and responsibilities
  - Qualified candidates with the necessary skill sets are sometimes difficult to recruit when openings occur in some District positions
  
- **SERVICE DELIVERY & QUALITY**
  - Parks and Recreation Department is underfunded to meet community needs
  - The District's ability to treat and regulate the flows to the WWP – primarily the wastewater discharge from non-residential areas – is often a challenge
  
- **COMMUNITY RELATIONS**
  - Negative views of the District are held by a small, but influential, group
  - Lack of organized, ongoing communication of District accomplishments and successes to the community
  - Boardroom lacks technology upgrades necessary to record meetings and provide visual quality needed for presentations to the Board and attending members of the public

## **TEMPLETON CSD: OPPORTUNITIES**

Opportunities are external in nature, meaning they are created, influenced, and/or controlled by forces in the external environment within which TCSD conducts business. These forces include trends in all levels of government (local, state and federal legislative, judicial and regulatory bodies), the twists and turns of the economy, cultural and societal trends, shifts in public opinion, competitive forces, changing standards and practices in the industry of managing community services, the continuous evolution of the state of technology, and other forces and entities in the community.

Opportunities are the situations, events, circumstances, prospects, and conditions created by outside influences and entities that provide TCSD with the positioning and the potential for advancement or success while pursuing fulfillment of the District Mission and Vision. The District opportunities that follow were identified during the TCSD strategic planning process in February and March 2020, and appear in no specific order of importance.

### **Key Opportunities Identified by the TCSD Board of Directors**

- **SOCIETAL TRENDS**
  - Potential increase in community efforts to practice water conservation
- **NON-TRADITIONAL FUNDING SOURCES**
  - Potential availability of grants to fund appropriate District services, programs, and operations
- **COMMUNITY RELATIONS**
  - Community support for TCSD services generated by passage of Measure A

## **TEMPLETON CSD: THREATS/CHALLENGES**

Like opportunities, threats (challenges) are external in nature. They are created, influenced, and/or controlled by forces in the external environment within which TCSD conducts business. These forces include trends in all levels of government (local, state and federal legislative, judicial and regulatory bodies), the twists and turns of the economy, cultural and societal trends, shifts in public opinion, competitive forces, changing standards and practices in the industry of managing community services, the continuous evolution of the state of technology, and other forces and entities in the community.

Threats (challenges) can be circumstances, events, conditions, trends, opinions, customs or virtually anything else that creates a problem, an issue or a roadblock that could potentially hinder or prevent the District from fulfilling its Mission or Vision. The District threats (challenges) that follow were identified during the TCSD strategic planning process in February and March 2020, and appear in no specific order of importance.

### **Key Threats/Challenges Identified by the TCSD Board of Directors**

- **GOVERNMENT**
  - State & local government and regulatory changes and unfunded mandates
- **NATURAL PHENOMENA**
  - Potential return of drought conditions
- **LEGAL ISSUES**
  - Potential litigation awards and legal fees
- **WATER ISSUES**
  - Potentially increasing wastewater flows requiring additional capital expenditures
  - External pressure for premature water unit releases
  - Naci pipeline failures

# **TEMPLETON COMMUNITY SERVICES DISTRICT BUDGET**

## **TCSD Operating/Capital Budget**

The Templeton Community Services District fiscal year 2020-2021 Operating Budget is a part of the TCSD planning process, although it has a short-term, tactical focus and is not generally considered to be “strategic.” Some items in the Operating Budget may, however, be pieces of longer-term strategic projects and initiatives and are therefore relevant to the strategic planning process. Capital budget items are, in fact, also included in the operating document so there are definitely strategic expenditures in the document. However, in the interests of keeping the Strategic Plan to a manageable document size, the actual budget document is not included in this Appendix. It is, however, available for review on the District website.