

C A M B R I A C O M M U N I T Y S E R V I C E S D I S T R I C T

**STRATEGIC PLANNING WORKSHOP**

25 January 2022 • via Zoom

Marilyn Snider, Facilitator – Snider and Associates (510) 459-5540  
Gail Tsuboi, Recorder – Tsuboi Design (925) 376-9151

**MISSION STATEMENT**

The Cambria Community Services District provides authorized municipal services to maintain and enhance the quality of life for the Cambria community and its visitors.

**CORE VALUES**

not in priority order

The Cambria Community Services District values . . .

- ♦ Integrity
- ♦ Open communication and Transparency
  - ♦ Safety
  - ♦ Fiscal responsibility
- ♦ Exemplary customer service
  - ♦ Mutual respect

**THREE-YEAR GOALS**

2021-2024 \* not in priority order

- ▶  Increase and improve communication with the public
- ▶ Achieve and sustain adequate financial resources
- ▶ Achieve a balance between growth and resources
- ▶ Develop and implement a long-term infrastructure and resources plan
- ▶ Achieve community preparedness for wildfires and other emergencies

**NEXT STEPS/FOLLOW-UP PROCESS**

<b>WHEN</b>	<b>WHO</b>	<b>WHAT</b>
Wednesday, January 26	Ossana Terterian	Distribute the retreat record to all participants.
Within 48 hours of receipt	All recipients	Read the workshop record.
At the February 1, 2022 Management Team meeting	CCSD Management Team (General Manager – lead)	Review the “Current Internal Weaknesses/Challenges” list for possible action items.
By February 16, 2022	Management Team	Share and discuss the Strategic Plan with staff face to face.
At the Feb. 17, 2022 CCSD Board Meeting	General Manager John Weigold IV	Present the Strategic Plan to the Board and the public.
Not later than a week before the Board meeting	Leads for the Objectives	Share the update for the Objective with Ossana. (Monitor progress on the goals and objectives and revise objectives (add, amend and/or delete), as needed.)
Monthly	Ossana Terterian and General Manager John Weigold IV	Prepare and distribute the updated Strategic Plan Monitoring Matrix to the CCSD Board and staff, which is available to the public.
June 27, 2022	General Manager John Weigold IV	Public comment session in preparation for the Strategic Planning workshop.
June 28, 2022 (Tuesday)	Participants from the January 25 Strategic Planning Workshop	Strategic Planning Workshop to: <ul style="list-style-type: none"> <li>- more thoroughly assess progress on the Goals and Strategic Objectives.</li> <li>- develop objectives for the next six months.</li> </ul>

## **S.W.O.T. ANALYSIS**

Strengths – Weaknesses - Opportunities - Threats

### **STRENGTHS AND ACCOMPLISHMENTS OF THE CAMBRIA COMMUNITY SERVICES DISTRICT SINCE THE AUGUST 3, 2021 STRATEGIC PLANNING WORKSHOP**

#### **Brainstormed List of Perceptions from each Participant**

- Timely and effective responses to emergency situations
- Public outreach
- Secured funding for restroom at community park
- Forward progress towards new skate park
- Repairs/Clean up from January 2021 Storm
- Received the IGA report from PG&E
- Progress towards WRF CDP
- Use of Social Media to inform public of meetings
- Excellent handling of emergency issues
- Excellent staff and employees
- The evolving relationship between the Board and its advisory standing committees of concerned citizens
- The collegial relationship between the CCSD Directors
- Progress in developing more recreational opportunities for the public's enjoyment of the East Ranch
- Our competent, proactive staff
- New Board President effort to encourage increased public involvement at Board meetings
- Ongoing implementation of Tyler Incode Financial system
- Quick action to address unexpected major break in San Simeon water pipeline
- Receive final Investment Grade Audit Report from PG&E
- External Communications
- Website Information
- Financial System Implementation
- Progress on wildfire safety (study underway on evacuation scenarios)
- First steps taken to identify funding needs and to find savings and/or revenue to meet them
- Continued progress on projects
- Continued improved reputation with regulatory agencies
- Positive community response to water conservation
- Tyler Incode implementation, complete payroll switchover still pending
- Expansion of social media presence
- Hiring of SAFER firefighters
- Receipt of the final IGA Report from PG&E
- Initiation of a Rate Study by Bartle Wells
- Progress in implementation of Tyler Incode
- Progress in executing timely completion and submittal of FY20/21 Audit
- Keep the faith by having a second meeting
- Staff competence and experience
- Board and staff working relationships
- Common understanding of our issues and problems
- Grants totaling over \$1.65 million
- Extensive handling of homeless activities on CCSD lands
- Management of the land base by CCSD
- Communication with the community has been a major part of the year for most people

## CURRENT INTERNAL WEAKNESSES/CHALLENGES OF THE CAMBRIA COMMUNITY SERVICES DISTRICT

### Brainstormed List of Perceptions from each Participant

- Isolated departments/poor inter-departmental communication
- Unfunded CIPs
- Staffing
- Underfunded services
- Deferred maintenance
- Staff making decisions the Board should make. Examples: Hiring of the auditor and financing the SST project
- Over funding the General Fund Reserves
- GM having outside professional obligations
- Zoom meetings
- Not being active in the community – not knowing the pulse of the community
- Understaffed in Admin, no back up in case of multiple illness among staff
- Inability to keep office open to the public due to Covid or lack of staff
- Deferred maintenance due to lack of funds
- Underuse of the abilities of the Standing Committees by Staff and Board
- Difficulty in obtaining financing for needed work on the wastewater system without a rate increase.
- Our ageing water distribution system
- Inadequate funds to continue to properly maintain the many forested open space parcels owned by the District
- Difficulty in allowing full public participation in decision making in the face of deadlines imposed by other entities (state, county, granting agencies, etc.)
- Lack of substantial funding for needed wastewater plant infrastructure improvements
- Reliance on continuing rate increases to stabilize District finances
- Aging water and sewer infrastructure
- Need for dependable evacuation plan in case of fire or other disasters
- Internal Communications
- Lack of Direction/Planning of Staff Assignments & Workloads
- Strategic Planning Tasked to Staff
- Board Meeting Efficiency and Timeliness
- Lack of focus on future financial risks
- Inability so far to finance needed wastewater plant upgrades
- Failure to clarify priorities (i.e., what are *critical* services?) and to act in accordance with them
- Some Board Members distrust staff
- Drain on staff time with Committee and Ad-hoc meetings
- Heavily weighted negative community opinions affecting staff morale
- Messaging disconnects on resource and infrastructure issues
- Lack of accountability
- Financial instability
- Micromanagement
- Unfunded liabilities drawing down the general fund
- Progress on the SST CIP items
- Focus on maturing the Strategic Plan process and refining directive tasks
- Lack of qualified, informed volunteers for many goals listed
- Very ambitious word documents that glaze my eyes over
- Lack of interest in the process by many
- Government rules/regulations/old outmoded plans that require much time/energy/interest to overcome.
- Small, limited staff very busy with existing situation that is limited in time/funding to accomplish planning/government morass in accomplishing necessary tasks
- Future financial stability
- Inability to prioritize issues and problems
- Unsustainable staff work loads
- Lack of enterprise reserve funds

- Lack of recognition for how much land is being managed by CCSD and lack of direction for management and how to pay for the management
- Lack of a plan for recreation throughout the community
- Trail system is extensive, but there's still a need for more trails throughout the community
- Lack of a funding plan for recreation throughout the community
- Short-term thinking
- Lack of resolve to do what is needed (comment from the public)
- Need for a greater district commitment for a skate park in the original location

**EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A POSITIVE IMPACT ON THE CAMBRIA COMMUNITY SERVICES DISTRICT IN THE COMING YEAR**

**Brainstormed List of Perceptions from each Participant**

- Grants/loans for drought projects/infrastructure
- Focus on climate change resilience
- Continued State focus on grants for healthy forests
- Lessening of Covid pandemic
- Better understanding by public of District challenges
- Availability of grants or government funding for projects
- More public participation in meetings
- Growing interest in public/private collaborations – such as the skatepark project – to develop or enhance the community's recreational opportunities
- Increased water security due to final approval of a CDP for the WRF
- Public engagement and concern regarding the community's response to disasters
- Continuing public involvement in the Board's decision making
- Potential grant funding opportunities for infrastructure needs
- Improving technologies regarding water availability
- Board Discussions and Planning of Strategic Goals
- Automation of Business Processes
- None on the horizon
- Political agreement on responsible growth
- Develop long term project plan that follows the strategic plan and Board priorities
- Staff morale – maintaining efficiency and avoiding overload
- Support for water and wastewater infrastructure improvements
- Improved economy post pandemic
- State and Federal funding assistance
- Secured water sourcing and storage
- Agreement on future building, expansion, and growth
- Additional rain, extension of wet season conditions
- Low lending rate continuance
- Rate assessment study
- We have a good landscape and setting to accomplish many tasks
- New Congressional representative
- Positive relationships with regulators and politicians
- Price of housing; we're becoming a premium community
- Potential increase in General Fund monies based on property tax revenues

## **EXTERNAL FACTORS/TRENDS THAT WILL/MIGHT HAVE A NEGATIVE IMPACT ON THE CAMBRIA COMMUNITY SERVICES DISTRICT THE COMING YEAR**

### **Brainstormed List of Perceptions from each Participant**

- COVID-19
- Supply chain issues making improvements/repairs more expensive
- Covid
- Increase in homelessness
- Drought
- Redrawn Supervisorial District lines
- Moved to a new Congressional District
- More homeless
- Inflation
- Prolonged drought affecting well levels and water supply
- Prolonged Covid
- Lack of public understanding of district issues
- Too much social media misinformation
- Continuing drought
- Flooding due to extreme storms
- Fire danger increasing due to drought
- Increasing pressure to develop vacant lots due to permitting of the WRF, despite continuing drought and increasing wildfire danger
- Potential lack of adequate rainfall to replenish District wells
- Covid 19 possible effects on staff health and availability
- Water/land use legal challenges
- Board/Standing Committees Lack of Cohesion
- Too Many CIP & Priority Lists
- COVID
- Rainfall & Water Well Levels
- Inflation – far and away the major threat, and one that is not yet being addressed by the CCSD
- Lack of consensus on responsible growth
- Drought unpredictability
- Staff turnover
- Pandemic continuance
- Drought
- Decreased revenue from the county
- Homelessness
- Redistricting at the county and Special District levels
- Infrastructure failures in water or wastewater systems and underlying transport systems
- Early return of drought conditions
- COVID
- Government regulations
- Rising interest rates and inflation
- SLO County redistricting
- Continued Covid impacts
- Continued drought
- Lack of affordable housing
- Becoming a premium community
- Increased density of housing; parking is impacted and can impact evacuation, fire suppression
- Decreased permanent population



# **STRATEGIC PLAN ELEMENTS**

Marilyn Snider, Strategic Planning Facilitator \* Snider and Associates (510) 531-2904

## **“SWOT” ANALYSIS**

Assess the organization's:

- Internal **S**trengths      - Internal **W**eaknesses
- External **O**pportunities      - External **T**hreats

## **MISSION/PURPOSE STATEMENT**

States WHY the organization exists and WHOM it serves

## **VISION STATEMENT**

A vivid, descriptive image of the future—what the organization will BECOME

## **CORE VALUES**

What the organization values, recognizes and rewards—strongly held beliefs that are freely chosen, publicly affirmed, and acted upon with consistency and repetition

## **THREE YEAR GOALS**

WHAT the organization needs to accomplish (consistent with the Mission and moving the organization towards its Vision) – usually limited to 4 or 5 key areas

## **KEY PERFORMANCE MEASURES**

What success will look like upon achievement of the goal

## **SIX MONTH STRATEGIC OBJECTIVES**

HOW the Goals will be addressed: By when, who is accountable to do what for each of the Goals

## **FOLLOW-UP PROCESS**

Regular, timely monitoring of progress on the goals and objectives; includes setting new objectives every six months