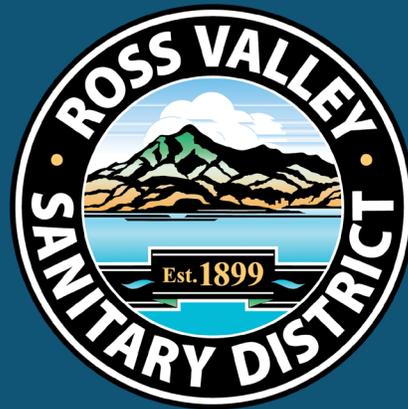


# FY 2024-25 BUSINESS PLAN



ROSS VALLEY  
SANITARY  
DISTRICT

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

## INTRODUCTION

In 2016, the Ross Valley Sanitary District established a Strategic Plan based on Effective Utility Management (EUM) Attributes. The Annual Business Plan implements the structure of the Strategic Plan by adding and completing various objectives that further the District's mission, core values, and policy-level goals established in the Strategic Plan. *New objectives in the 2024-2025 plan are shown in blue.* Together the objectives in the Business Plan, past and present, contribute to the District's aim to be a high performing organization delivering excellent public service to its customers.

The annual Business Plan is organized according to the following EUM Attributes:

1. Customer Service, Stakeholder Understanding and Support
2. Employee and Leadership Development
3. Enterprise Resiliency
4. Financial Viability/Sustainability
5. Infrastructure Stability and Product Quality (Wastewater Conveyance)
6. Operational Optimization
7. Water Resources and Community Sustainability

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

**EUM ATTRIBUTE NO. 1: CUSTOMER SERVICE, STAKEHOLDER UNDERSTANDING AND SUPPORT**

**POLICY-LEVEL GOALS**

- Provide High Quality, Reliable, Cost-Effective Customer Service
- Provide Customers with awareness of and confidence in RVSD and how the District provides its services
- Engage in collaborative partnerships with JPA member agencies to maximize quality and efficiency of wastewater utility services in central Marin
- Cooperate with our local government partners to work together on areas of common interest to our customers and citizens
- Maintain positive relationships with RWQCB and meet or exceed all regulatory enforcement requirements

**2024-2025 BUSINESS PLAN OBJECTIVES**

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Code Enforcement Initiative – Followup letters and actions for lateral connection defects or smoke testing defects	Ongoing	PBr, PF	95 letters issued 59 laterals replaced 3 active permits
Combined outreach with JPA Members and other Marin sanitary districts on Sewer PSAs– Cable TV, YouTube, Brochures, Handouts	Summer 2024 and Nov-Feb 2024-25	SM	Summer campaign with Olympics completed. Fall campaign (Nov-Feb) completed. Spring campaign (Mar-May)
Participate in Discussions Related to Consolidation with JPA partner agencies	As Needed	SM, FN	Staff attendance at CMSA, SRSD, and Ad Hoc Committee meetings, as needed/ongoing.
Easement Program – Vegetation Clearing, Access Maintenance and Property Owner Coordination	June 2024	PBr, JH	10 easements cleared 3 clearings scheduled 4 access gates installed 2 access staircase installed

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Coordinate Lateral Program and Capital Program with Town/City/County paving projects	As Needed	PhB, PBr	County paving planned in Kentfield initiated new capital project "Palm-Mann-Cypress GSIP" in Dec 2024, added to CIP, Out to bid in May 2025.
Implement Cost Recovery Program for assisting JPA and other local agencies with various short-term tasks	As Needed	PBr, SM	No assistance requested
Implement Mutual Aid Agreement with JPA and other Marin County sanitary districts	As Needed	PBr, JH	Assistance provided to Novato San for force main repair
Coordinate with Regional Water Board for Rescission of 2013 CDO	Summer 2026	SM	Fairfax capacity project 50% Design Completed, on schedule.
Coordinate with LAFCo for annexing/de-annexing parcels to/from District	As Needed	SM, FN	SD2 Boundary Correction Completed February 2025. San Quentin Gun Range Annexed to District, April 2025. San Quentin Prison and San Quentin Village Annexation Process Initiated.
Ad hoc committee on public education and outreach	As Needed	SM	Ad campaign targeting workers in District launched (Bay Area Digital Solutions), shared with committee members in February 2025
Business Breakfasts at 1111 Andersen Board Room – Annual Outreach Events	Feb/March 2025	FN	Business Breakfasts Conducted March 26 (Local Governments) and June 4 (Plumbers and Other Sanitary Districts)

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Renew the District's Transparency Certificate of Excellence	February 2025	CW	Completed November 2024

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

*FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE*

**EUM ATTRIBUTE NO. 2: EMPLOYEE AND LEADERSHIP DEVELOPMENT**

**POLICY-LEVEL GOALS**

- Develop and support an organizational culture of trust, teamwork, mutual respect, and professionalism at all levels of the RVSD organization
- Ensure Board members have clear roles and responsibilities, and regular professional development opportunities to ensure effective organizational leadership
- Ensure District commitment to professional development, career paths, and succession planning
- Attract, develop, and retain high quality staff
- Ensure staff have skills and tools to maximize the value of their work
- Ensure staffing resources/skills appropriately aligned with level of service objectives
- Maintain effective level of professional HR management services

**2024-2025 BUSINESS PLAN OBJECTIVES**

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Update Five-Year MOU with Represented Employees	July 2024	FN, SM	Completed December 2024
Safety Committee to organize required training for information awareness, skills, and regulatory compliance	Monthly	JH, FN	Meets 10x/year. New Safety Committee members appointed from each dept annually in January. Recently adopted Workplace Violence Prevention Policy (June 2024) and Emergency Action Plan (Dec 2024)

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Leadership Initiative to encourage a high performing culture based on positive behaviors (The RVSD Way, CultureWise)	September 2024 Annual Review, Ongoing	SM, CW	Program review completed, continuing weekly fundamental insights by all employees, GM review during all staff meetings. Program Refresh Meetings Conducted June 2025
Competency-based training for collection system workers, supervisors, and inspectors. SOP updates for new equipment.	Ongoing	PBr, JH, KL	Updates completed for new equipment. Competency based training incorporated into Vector Training module Dec. 2024 Updated District on-call module with checklist to ensure competency based training is captured for staff onboarding to On-call
Increase capabilities of the pump station crew through additional skill sets in mechanical, electrical and instrumentation technologies.	Ongoing	PBr, KL	In November 2024 field staff attended basic electrical training, electrical troubleshooting and preventative maintenance / 6 staff members have rotated through the pump station duties for training on PLC's, station troubleshooting and pump removal.

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Consider Opportunities in Staff Cross-Training for Succession Planning and Organizational Resilience	As Needed	FN, PBr	Crew rotations completed, 6 staff members have rotated to other O&M departments for cross training and experience A survey monkey questionnaire was sent to staff for input on crew knowledge for staff rotation / placement 7/8/25
Conduct Effective Supervisory Practices Workshop for New and Existing Supervisors	December 2024	FN	Six workshops completed April 16- June 4, 2025
Review and update District Personnel Policies for Board approval	March 2025	FN	Scheduled for AFSCME review and comments in July 2025 and Board review and adoption in September 2025

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

**EUM ATTRIBUTE NO. 3: ENTERPRISE RESILIENCY**

**POLICY-LEVEL GOALS**

- Develop effective emergency planning and preparation
- Maintain critical infrastructure in a high-quality state, with planned redundancy for critical systems
- Partner with local agencies to provide backup resources
- Consider financial risk from a range of sources as part of the District's risk management strategy; property damage, legal/litigation, regulatory factors, personnel, etc.

2024-2025 BUSINESS PLAN OBJECTIVES

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Use recent Pump Station Inventory to develop list of critical spare parts and/or equipment and include in budget	Fall 2024	PBr,KL	Completed September 2024
Conduct annual emergency operations training including spill response	December 2024	PBr, JH	Completed November 29, 2024
Conduct Sewer System Management Plan (SSMP) Audit	August 2024	SM, PBr	Audit Complete January 2025 (due date Feb. 2, 2025)
Update SSMP	August 2025	SM, PBr	Draft SSMP Complete May 21, Scheduled for June 18, 2025 board consideration.
Install new generator (for backup power) at LS 30	June 2025	PhB, PBr	Part of Project under construction October 2024
Install new generator (for backup power) at 1111 Andersen	October 2024	PBr,KL	Under construction – project completion expected June 2025
Apply for CSRMA 2025 workers' comp excellence award	Sept 2024	JH, FN	Postponed to next year filing due to staff (w/c) back injury. On track

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
			for Sept 2025 application. Applied for Health & Wellness Reimbursement Program funds and Safety & Risk Control Reimbursement funds from CSRMA.

**EUM ATTRIBUTE NO. 4: FINANCIAL VIABILITY/SUSTAINABILITY**

**POLICY-LEVEL GOALS**

- Utilize best practices of public utility industry financial planning and apply these practices to an annually updated five-year rolling forecast
- Manage utility rates to ensure predictable, smooth trends in rates
- Achieve and maintain the highest possible bond credit rating; lowest cost of capital
- Track and adequately fund long-term pension and OPEB liabilities

**2024-2025 BUSINESS PLAN OBJECTIVES**

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Increase Credit Rating from AA to AA+, Consider Re-funding Bonds	January 2025	FN, SM	Refunding of 2013, 2014, 2018 series bonds reviewed and action postponed pending disposition of Larkspur Landing Property
Annual review of District Pension and OPEB liabilities	April 2025	FN, SM	Completed April 2025

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Review and update District Financial Policies for Board approval	January 2025	FN	Completed April 2025
Consider adopting a two-year budget cycle	February 2025	FN	Postponed
Larkspur Landing parcel planning: Phase 2 (cont.): property disposition, coordination with lengthened City of Larkspur General Plan process	September 2024	FN, SM	General plan adopted September 2024
Larkspur Landing parcel planning: Phase 3: property disposition, Surplus Lands Act process	December 2024	FN, SM	Property Declared Exempt Surplus Land February 2025 per SLA, Request for Qualifications approved by Board in May 2025 with August 15, 2025 due date for Interested Developers
Kerner parcel planning: property disposition, Surplus Lands Act process	September 2024	FN, SM	SLA process completed August 2024, Kerner property sold to ELM in December 2024

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

**EUM ATTRIBUTE NO. 5: INFRASTRUCTURE STABILITY AND PRODUCT QUALITY (WASTEWATER CONVEYANCE)**

**POLICY-LEVEL GOALS**

- Utilize Asset Management methods and tools as the foundation-enhancing infrastructure stability and customer Level of Service, at the lowest sustainable life cycle cost
- Support a steady, cost-effective, long-term program for private lateral replacements
- Invest in appropriate technology, tools, and processes to support Asset Management and leverage efficiency gains in resource requirements

**2024-2025 BUSINESS PLAN OBJECTIVES**

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Document Asset Management Activities in Annual Metrics and Capital Reports	Metrics: Nov 2023, Capital: Dec 2023	PF, PhB, PBr, SM	Completed November 2024
Implementation of the capital projects in Table 29 of the Budget: Design and Construction	Construction of New Projects in Fall-Winter 2024, Design in Fall-Winter, Construction Spring 2025-	SM, PhB	LS 20, 31, 32 under construction. LS 30 under construction. 23/24 Gravity complete. Woodland Capacity complete. 1111 Andersen site improvements complete. 24/25 Gravity Under Construction, Palm-Mann-Cypress Gravity Project Bid Opening June 5.

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Integrate Infrastructure Asset Management Plan (IAMP) highest risk assets into capital projects and in house repair program	Design of 2024/25 Gravity Sewer Improvements and LS30 Heather Gardens, Fairfax Capacity and Winship Br. Sewer	PhB, PF, PBr	All integrated into CIP as of May 2025, including Palm-Mann-Cypress Gravity Project which is high I&I area identified in 2023 Wastewater Collection System Capacity Evaluation (Laurel Grove Capacity Issue)
Maintain lateral program participation with various incentives, including paving projects, condition-based enforcement, and RVSD capital projects	Ongoing, Documented in Monthly and Annual Metrics Reports	PhB, PBr	Ongoing
Use Dye Test Data from Code Enforcement Initiative to Map Lateral Connections	Ongoing	PBr	37 confirmed and mapped during this period (145 laterals mapped overall)

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

**EUM ATTRIBUTE NO. 6: OPERATIONAL OPTIMIZATION**

**POLICY-LEVEL GOALS**

- Utilize select metrics and regular performance reporting to assess the efficiency and effectiveness of operations, business services, and customer services
- Develop and maintain integrated information systems for business services, O&M, capital program management, and financial systems
- Utilize CMMS to manage 100% of its non-emergency O&M operations, preventative maintenance, and field service calls

**2024-2025 BUSINESS PLAN OBJECTIVES**

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
1111 Andersen Facility – Completion of Site Improvements	September 2024	FN, PBr, PhB	Completed February 2025
Include All Preventative Maintenance Tasks in CMMS related to the Pump Station Asset Inventory	Fall 2024	PBr, PF, KL	Completed August 2024. Indoor GIS (Esri) approved January 2025 to better organize preventive maintenance tasks at pump stations, kickoff June 2025.
Explore permit tracking system solution for permit forms and inspection workflows with web-based customer service portal for application intake	October 2024	FN, PhB	Responses to RFPs received in Dec 2024; evaluation process, including software demos in Jan/Feb 2025. Tyler Technologies ("Incode") is preferred vendor. New software included in proposed FY26 budget. Request for contract for services to be presented to Board in July 2025.

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Integrate ArcGIS/InfoAsset data for field access to property ("lateral") records	October 2024	FN, PF, PhB	Delayed, planned to be integrated with permit tracking system implementation

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

**EUM ATTRIBUTE NO. 7: WATER RESOURCES AND COMMUNITY SUSTAINABILITY**

**POLICY-LEVEL GOALS**

- Maintain and operate RVSD's system in a manner that supports local watershed health and water resources management
- Minimize the impacts from Inflow and Infiltration (I&I) on RVSD cost of service (capital and O&M) and recycled water feasibility
- Plan and mitigate for long-term impacts of sea level rise on RVSD infrastructure and operations
- Track and report the carbon footprint of the enterprise; provide carbon-neutral wastewater utility service

2024-2025 BUSINESS PLAN OBJECTIVES

OBJECTIVE	DATE	RESPONSIBLE PERSON	STATUS TO DATE
Optimize regular use of recycled water from CMSA	Ongoing	PBr, JH, SM	245,130 gallons recycled (about 26.7% of total water used)
Review Energy Use at Pump Stations and Identify Opportunities for Efficiency	January 2024	PhB, PBr, KL, PF, SM	Postponed
Stabilize sewers at creek crossings and remove sewers from streambeds where feasible	As needed	PhB, SM	193 creek crossings inspections by condition assessment conducted Fall 2024. 4 creek crossings in Fairfax Capacity project in design
Include gravity sewer and force main improvements in tidally influenced groundwater zones in upcoming capital projects	February 2024	PhB, SM	24/25 Gravity sewer improvements design out to bid includes sewers on Stadium, Berens, Lancaster and McAllister in tidally influenced areas. FM-14 Repairs to be considered in 2025-26

# FY 2024-2025 BUSINESS PLAN

ROSS VALLEY SANITARY DISTRICT

## FY 2024-2025 OBJECTIVES BY EFFECTIVE UTILITY MANAGEMENT (EUM) ATTRIBUTE

Responsible Person Initials Key:

SM – Steve Moore

FN- Felicia Newhouse

PBr – Paul Bruemmer

PhB – Phil Benedetti

CW – Christina Winnicki

PF – Patrick Filipelli

JH – Josh Hill

KL – Kevin Lewis