



# STRATEGIC PLAN

**Fiscal Year 2027**

## **Vision**

**To Be a Top Performing Public Water Agency**

## **Mission Statement**

**Mesa Water District, a local independent special district, manages its finances and water infrastructure, and advocates water policy, while reliably providing an abundance of clean, safe water to benefit the public's quality of life.**

## **Core Values**

- **Health and Safety of the Public and Our Staff**
- **Excellence**
- **Philosophy of Abundance**
- **Perpetual Agency Philosophy**

## **Strategic Goals**

- 1. Provide an abundant, local, reliable and safe water supply.**
- 2. Perpetually renew and improve our infrastructure.**
- 3. Be financially responsible and transparent.**
- 4. Increase public awareness of Mesa Water.**
- 5. Attract, develop and retain skilled employees.**
- 6. Provide excellent customer service.**
- 7. Actively participate in regional and statewide water issues.**
- 8. Practice continual business improvement.**

## **Strategic Goal #1**

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*Provide an abundant, local, reliable and safe water supply.*

**Objective A: Continue to meet and surpass water quality standards.**

**Objective B: Maintain and protect a high-quality water supply.**

- ◆ Bring the California Division of Drinking Water-approved Mesa Water Cross-Connection Control Plan to the Board for adoption by December 2026

**Objective C: Continue to ensure a reliable and abundant supply of water.**

- ◆ Present backup power solutions for Well Nos. 12 & 14 to the Board by September 2026
- ◆ Vigorously pursue next steps for the Local groundwater Supply Improvement Project (Local SIP) by June 2027

**Objective D: Ensure emergency operations.**

- ◆ Develop and implement by December 2026 a standardized Emergency Response Process as a resource for key staff, outlining protocols for notification, reporting and documentation to ensure timely communication and accurate recordkeeping during emergencies
- ◆ Complete the Reservoir 1 Upgrades Project by June 2028

## Strategic Goal #2

*Perpetually renew and improve our infrastructure.*

### **Objective A: Manage water infrastructure assets to assure reliability.**

- ◆ Implement software by March 2027 to process and track underground service alert tickets
- ◆ Complete the Reservoir 2 Recovery and Reservoir 2 Pump Station Upgrades Project by June 2027

### **Objective B: Efficiently manage our water system.**

- ◆ Complete the Interagency Water Transfer with the City of Newport Beach and Orange County Water District (OCWD) by September 2026
- ◆ Submit a plan to implement Mesa Water's Mobile Work Order Functionality by December 2026
- ◆ Complete the Interagency Water Transfer with the City of Huntington Beach and OCWD by June 2027

### **Objective C: Plan future projects based on data-driven and life-cycle cost decisions.**

- ◆ Bring to the Board by August 2026 the recommendation from the Mesa Water Reliability Facility (MWRF) Electric Vehicle Charging Station Feasibility Study
- ◆ Complete a Supervisory Control and Data Acquisition Needs Assessment (SCADA) by December 2026
- ◆ Release a Request for Proposal (RFP) for a SCADA Master Plan by June 2027
- ◆ Evaluate the development of a District Strategic Energy Plan by June 2027
- ◆ Initiate Cathodic Protection Improvements by June 2027 as adopted in the Master Plan Update and Capital Improvement Program Update

### **Objective D: Improve Mesa Water's information technology infrastructure assets to assure reliability and security.**

- ◆ Complete a Microsoft Office 365 optimization review by October 2026
- ◆ Competitively bid Information Technology services and present results to the Board by October 2026
- ◆ Implement improved meter reading software and hardware by December 2026

## Strategic Goal #3

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*Be financially responsible and transparent.*

**Objective A: Maintain AAA financial goals and meet the appropriate designated fund level goals.**

- ◆ Develop a standalone report for the AAA rating metrics by December 2026

**Objective B: Maintain competitive rates and efficiency in per capita expenditures.**

- ◆ Initiate a 5-year water rate study by December 2026

**Objective C: Fund the District's priorities.**

- ◆ Conduct Federal Earmarks advocacy through September 2026 for Mesa Water's priority projects — "Mainline Valves" and "Cybersecurity" and determine 2027 priorities by March 2027
- ◆ Aggressively pursue grants and low-interest loans for the Local SIP (as Notice of Funding Opportunities are released) by June 2027

**Objective D: Encompass financial responsibility and transparency.**

- ◆ Conduct a thorough and transparent staff-led RFP by October 2026 to retain a firm to provide General Legal Counsel Services
- ◆ Standardize contracts and create a procurement matrix by December 2026
- ◆ Create and implement Standard Operating Procedures across key financial processes: Accounts Payable, Accounts Receivable, Budgeting, Cash Receipts, Financial Reporting, Payroll, Procurement, and Project Tracking by June 2027
- ◆ Digitize and automate key forms and contract workflows using Laserfiche by June 2027, reducing administrative and paper costs while improving accuracy, auditability and real-time transparency

**Objective E: Support the selection and implementation of a new financial system.**

- ◆ Complete the RFP and vendor selection process by January 2027 to procure a modern financial and accounting system
- ◆ Start the implementation guidelines for the modern financial and accounting system by April 2027

## Strategic Goal #4

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*Increase public awareness of Mesa Water.*

**Objective A: Enhance Mesa Water’s visibility and positive recognition.**

- ◆ Complete a website user analysis by December 2026 to enhance the user-experience of MesaWater.org

**Objective B: Increase awareness of Mesa Water and water among key audiences.**

- ◆ Create a research-driven plan for a high school and college education program at the Mesa Water Education Center by December 2026
- ◆ Launch quarterly public tours at the Mesa Water Education Center by March 2027
- ◆ Host 100 field trips and tours at the Mesa Water Education Center by June 2027
- ◆ Reach all audiences, e.g., renters, by cultivating partnerships and sponsorships with trusted local organizations and geotargeted digital and direct mail marketing by June 2027
- ◆ Conduct an RFP to select a qualified social media consultant by June 2027 who will enhance Mesa Water’s digital presence, improve community engagement and support strategic communication goals

**Objective C: Increase customer knowledge about water-use efficiency and water-wise resources.**

- ◆ Conduct an RFP for Professional Services to select a firm by April 2027 to provide water-wise landscaping options at the Mesa Water Education Center and at District Headquarters
- ◆ Host two CA water-wise landscape workshops, including smart timer education, by June 2027

## **Strategic Goal #5**

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*Attract, develop and retain skilled employees.*

**Objective A: Attract and retain a qualified, skilled and capable workforce.**

- ◆ Complete an Agency-Wide Classification and Compensation Study by October 2026
- ◆ Complete a general salary increase survey of our benchmark agencies by June 2027

**Objective B: Develop employee skills.**

- ◆ Conduct two Elite Onboarding sessions by June 2027

**Objective C: Enhance employee engagement.**

- ◆ Administer biannual and annual employee engagement surveys by June 2027
- ◆ Establish a redesigned employee recognition and engagement framework by June 2027, prioritizing impactful events and qualitative feedback loops to enhance employee satisfaction and retention

**Objective D: Provide a safe working environment.**

- ◆ Explore and evaluate a Lifestyle Spending Account (LSA) Wellness Program by March 2027

**Objective E: Improve operational processes and workflow.**

- ◆ Update recruitment and selection Standard Operating Procedures by December 2026

## **Strategic Goal #6**

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*Provide excellent customer service.*

**Objective A: Provide outstanding internal and external customer service in a timely, courteous and effective manner.**

**Objective B: Enhance the customer experience.**

- ◆ Implement a new Customer Information System by October 2026

**Objective C: Measure success.**

- ◆ Implement new metrics for the Elite Customer Services Standards by October 2026

**Objective D: Continuous improvement and reinforcement.**

- ◆ Implement a cashless payment program by June 2027

### **Strategic Goal #7**

*Actively participate in regional and statewide water issues.*

**Objective A: Accomplish the District's Policy Priorities.**

- ◆ Advocate through June 2027 to support appropriate Low Income Rate Assistance programs for residential customers of public water agencies in California
- ◆ Support through June 2027 industry associations' sponsored state legislation in alignment with the District's priority Policy Platforms and Policy Positions
- ◆ Continue engaging the Buried Utilities Coalition (BUC) through June 2027 to advocate on priority air quality regulations of high impact to Mesa Water

**Objective B: Positively influence water policy and other priority policy issues.**

- ◆ Engage in the state of California's Ocean Plan Amendment process through June 2027 to enable more favorable permitting conditions for water desalination projects
- ◆ Influence implementation of California's water use efficiency regulation through June 2027 to provide the maximum variance for potable reuse of indoor water
- ◆ Advocate through June 2027 for water quality regulatory rulemaking to include a standardized cost-benefit analysis for determining economic feasibility

**Objective C: Optimize governmental efficiencies affecting Mesa Water.**

- ◆ Continue improving internal efficiencies through June 2027 for Water Policy processes involving other Mesa Water departments

**Objective D: Facilitate Mesa Water's participation with water, government, utility and non-governmental organizations.**

## Strategic Goal #8

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*Practice continual business improvement.*

### **Objective A: Conduct the following Annual Audits:**

- ◆ Present to the Board by August 2026 the Gallup Employee Engagement Survey
- ◆ Present to the Board by October 2026 the Mesa Water Annual Financial Report (AFR)
- ◆ Present to the Board by October 2026 the Mesa Water District Improvement Corporation (MWDIC) AFR
- ◆ Present to the Board by October 2026 the District-Wide Performance Audit
- ◆ Present to the Board by October 2026 the Environmental, Health & Safety Audit
- ◆ Present to the Board by October 2026 the Customer Service Audit
- ◆ Present to the Board by January 2027 the FY 2026 Penetration and NIST 2.0 Delta Change Gap Assessments

### **Objective B: Each year, in a six-year rotation, one department will be the focus of an in-depth Department Assessment.**

- ◆ Provide four quarterly updates to the Board by June 2027 regarding the initiatives stemming from the FY 2025 Financial Services Department Assessment
- ◆ Implement by August 2028 the action items from the FY 2026 Engineering Department Assessment
- ◆ Hire a qualified consultant by December 2026 to conduct the FY 2027 Water Operations Department Assessment
- ◆ Hire a qualified consultant by June 2027 to conduct the FY 2028 Department Assessment

### **Objective C: Assure annual completion of the District's Business Improvement Process.**

- ◆ Include the Audit Report Card in the General Manager's Annual Review with the Board of Directors by October 2026