

2026

STRATEGIC PLAN



Pauma Valley
Community
Services

INTRODUCTION

STRATEGIC PLAN

This Strategic Plan provides a framework for how the Pauma Valley Community Services District (District) will respond to current challenges and plan for future opportunities in fulfillment of its responsibilities to the community it serves. The Plan reaffirms the District's mission, vision, guiding principles, and goals as a special-purpose public agency responsible for wastewater collection and treatment, as well as community access control and patrol services. It also serves as an important linkage between the policy direction established by the publicly elected Board of Directors and the day-to-day administration of the District by the General Manager.

The District, like many public agencies, faces a number of complex and interrelated challenges, including increasing operating and capital costs, infrastructure renewal needs, evolving regulatory requirements, heightened customer expectations, workforce transitions, climate-related impacts, and rapid technological change. In response, the District recognizes the importance of establishing clear priorities and strategic approaches to ensure effective service delivery and long-term sustainability.

This plan defines the District's strategic priorities and outlines specific strategies and measurable objectives to guide decision-making and action. Board policies and decisions will consistently support these commitments, and progress will be monitored regularly. The Strategic Plan will be reviewed and updated as needed to remain responsive to changing conditions and emerging opportunities.

PLAN DEVELOPMENT

To accomplish the development of the Strategic Plan, the following process was followed and completed in public meetings for members of the community to observe and comment.

STRATEGIC PLANNING PROCESS



- **Mission and Vision:** Review and update the District’s Mission and Vision to clearly define its purpose and long-term direction.
- **Guiding Principles:** Establish guiding principles that reflect the District’s core values and commitments in achieving its Mission.
- **SWOT Analysis:** Conduct a Board-led SWOT analysis to identify the District’s strengths, weaknesses, opportunities, and challenges. The results inform the Strategic Priorities.

- **Strategic Priorities:** Identify key Strategic Priorities that guide the District’s focus and support long-term success.
- **Objectives and Tactics:** Identify an initial set of objectives and tactics designed to accomplish the Strategic Priorities. These represent actionable initiatives for the General Manager to implement.
- **Scorecard:** Develop a scorecard to track progress on the identified objectives and tactics. The scorecard will be used by the General Manager to monitor performance and report regularly on the status of Strategic Plan initiatives.
- **Review and Updates:** Monitor progress regularly and make adjustments as needed. While the Strategic Plan is long-term in nature, progress will be shared with the Board, and the plan will typically be reviewed every two to three years.

MISSION/VISION

MISSION

The District has established the following mission statement to guide decision making on behalf of the customers and community we serve:

“The Mission of the Pauma Valley Community Services District is to protect the public health and environment of its community by providing effective wastewater management, stormwater drainage control, life safety assistance, security services, and exceptional customer care.”

VISION

The vision statement represents the aspiration of the District:

“Pauma Valley Community Services District is a responsive and innovative organization committed to serving our community with trust, transparency, and fiscal responsibility.”

GUIDING PRINCIPLES

The District's Guiding Principles define how we conduct our work and make decisions in pursuit of our Mission and Vision. These SMART principles provide a consistent framework for governance, operations, and community engagement.

- **Safety First:** We prioritize safety in all that we do. The safety of our employees, customers, contractors, and the community is fundamental to every decision, operation, and investment.
- **Mission-Focused Service:** We deliver reliable, high-quality essential services. Our work is guided by our mission to serve the community with professionalism, reliability, and a commitment to public service excellence.
- **Accountability & Transparency:** We act with integrity and openness. We are responsible stewards of public resources and maintain clear, transparent practices that ensure accountability to the Board, stakeholders, and the public.
- **Resilience & Stewardship:** We plan and invest for the long term. We responsibly manage financial, human, and infrastructure resources to ensure sustainability, adaptability, and long-term service reliability.
- **Teamwork & Continuous Improvement:** We collaborate, learn, and improve. We foster a respectful and collaborative workplace that values professional development, innovation, and continuous improvement to better serve our community.

SWOT ANALYSIS

Conduct a Board-led SWOT analysis to identify the District's strengths, weaknesses, opportunities, and threats. The results inform the Strategic Priorities.

This following is a draft summary of the initial SWOT analysis input from Board members. This will be discussed in the first Strategic Planning meeting:

Strengths

- The District benefits from a highly capable, dedicated, and hard-working staff, including strong leadership from the General Manager.
- The Board brings a broad range of experience in governance, personnel management, and problem-solving, works collaboratively, and demonstrates a willingness to make thoughtful and timely decisions.
- As the sole provider of essential services to the community, the District remains committed to delivering a high level of reliable, responsive customer service.
- The District uses cost-of-service studies to inform rate setting and ensure rates and charges are equitable, transparent, and financially sound.
- The District is actively pursuing alternative funding sources and has successfully secured its first grant to support District initiatives.
- The District demonstrates leadership in community communication by collaborating with the Roadway Association and Water Company to produce a joint newsletter that improves outreach and information sharing.

Weaknesses

- The District faces challenges in attracting and retaining experienced, well-trained staff due to turnover, geographic constraints, and a compensation structure that is not fully competitive.
- Community volunteer participation has remained limited despite outreach efforts.
- Board members have limited direct experience with the operational and business aspects of Community Services District functions.
- Current reserve levels are not sufficient to fully support long-term operational needs, capital requirements, and risk management.
- Portions of the District's infrastructure are aging and at varying stages of their life cycle, and a comprehensive repair, replacement, and capital planning program has not yet been developed.
- Community awareness of the District's services, initiatives, and accomplishments remains limited.
- Several third-party disputes are ongoing and have not yet been fully resolved.
- A peer association has an incomplete understanding of the District's legal authority related to the provision of security services.

Opportunities

- Continue to invest in staff training and professional development to strengthen workforce capacity, institutional knowledge, and succession planning.
- Improve operational effectiveness by ensuring appropriate staffing levels, applying industry best practices, and enhancing internal communication and coordination.
- Increase organizational effectiveness and accountability through a clearer definition and shared understanding of the respective roles and responsibilities of the Board and the General Manager.
- Develop a long-range financial plan that aligns projected revenues, operating costs, reserves, and capital needs to support the District's long-term sustainability.
- Evaluate short- and long-term financing options and incorporate appropriate strategies into the District's financial planning framework.

- Create a comprehensive capital improvement plan that addresses new facilities, asset replacement, system upgrades, and long-term infrastructure needs.
- Implement a computerized maintenance management system (CMMS) to improve tracking, scheduling, and completion of preventive and corrective maintenance activities.
- Enhance community and stakeholder communications by clearly explaining District services, decisions, challenges, and accomplishments, and by establishing meaningful opportunities for public feedback.
- Evaluate and better understand the District's ultimate Sphere of Influence to support informed planning, service delivery, and growth considerations.
- Strengthen relationships and build trust with the community through consistent engagement, transparency, and responsiveness.

Threats

- Ongoing challenges in retaining qualified staff across all levels of the organization, which may affect service continuity and institutional knowledge.
- Uncertainty in the District's ability to adequately fund both planned capital investments and unanticipated emergency needs in a cost-effective manner.
- The absence of a fully developed strategy to address aging infrastructure, increasing the risk of service disruptions and higher long-term costs.
- Persistent negative community perceptions that may hinder public trust, engagement, and support for District initiatives.
- Unresolved and ongoing conflicts with third parties, which carry uncertain outcomes and divert financial and staff resources from higher-priority operational and strategic needs.

STRATEGIC PRIORITIES

<p>Ensure Long-Term Financial Strength</p>	<p>Maintain the District’s financial stability through prudent planning, responsible budgeting, and transparent stewardship of public funds to support reliable services now and in the future.</p>
<p>Further Community Engagement</p>	<p>Strengthen trust and understanding by communicating clearly and consistently with our community and customers, and by encouraging meaningful public participation in District activities and decisions.</p>
<p>Maintain and Improve Existing Infrastructure</p>	<p>Protect and enhance District assets through effective asset management, timely maintenance, and strategic investment to ensure reliable, cost-effective operations and long-term system resilience.</p>
<p>Further Staff Development and Engagement</p>	<p>Attract, retain, and support a skilled and motivated workforce by fostering a professional, inclusive environment that promotes learning, collaboration, and readiness to meet evolving District needs.</p>
<p>Effective Governance</p>	<p>Support informed, ethical, and accountable governance by cultivating qualified Board leadership that understands public policy, utility management best practices, and the needs of the community.</p>
<p>Further Stakeholder Engagement</p>	<p>Build strong, productive relationships with partners, regulators, and other stakeholders through proactive communication and collaboration that advance the District’s mission and long-term success.</p>

STRATEGIC OBJECTIVES

1. Ensure Long-Term Financial Strength

- a. Develop a long-range financial plan that aligns projected revenues, operating costs, reserves, and capital needs to support the District's long-term sustainability.
- b. Evaluate short- and long-term financing options and incorporate appropriate strategies into the District's financial planning framework.
- c. Review the Operating Reserve Policy and develop a phased strategy to achieve adopted reserve targets.
- d. Actively pursue opportunities to secure additional grant funding to support District operations and capital projects.
- e. Develop a divisional accounting structure in which each division maintains its own rates and charges, assets, and liabilities to improve financial transparency and accountability.

2. Further Community Engagement

- a. Identify and accommodate customer preferences for receiving District communications (e.g., direct mail, email, and text notifications) and incorporate these preferences into the Communications Plan.
- b. Develop and implement a Strategic Communications Plan that includes the following initiatives:
 - i. Produce a themed quarterly community newsletter addressing key topics such as fiscal condition, security and gate services, and treatment and collection services.
 - ii. Create an annual "Year in Review" report highlighting District accomplishments and performance for community distribution.
 - iii. Host a 65th Anniversary "State of the District" event to engage and inform the community.
 - iv. Diversify communication methods by using targeted social media platforms to deliver focused messages through short-form video content.

- v. Develop a podcast platform to communicate District initiatives, challenges, and achievements in greater depth.
 - c. Maintain a District presence at community events by securing booths or tables to answer questions and share information.
 - d. Ensure the District website is regularly updated with accurate, timely information and designed to promote transparency and public accessibility.
 - e. Maintain governance and transparency practices that qualify the District for the Special District Leadership Foundation (SDLF) District Transparency Certificate of Excellence.
- 3. Maintain and Improve Existing Infrastructure
 - a. Develop a comprehensive Capital Improvement Plan (CIP) that addresses new facilities, asset replacement, system upgrades, and long-term infrastructure needs.
 - i. Develop a sewer lateral assessment and replacement program to address leaks and cross-connections.
 - ii. Conduct risk assessments for pump stations to prioritize improvements and reduce failure risks.
 - b. Implement a computerized maintenance management system (CMMS) to improve tracking, scheduling, and completion of preventive and corrective maintenance activities.
 - i. Perform proactive sewer system maintenance through routine cleaning, CCTV inspections, and chemical root control to reduce preventable sanitary sewer overflows (SSOs).
 - c. Leverage the capacity of the Wastewater Treatment Plant to enhance operational efficiency and increase overall service reliability.
- 4. Further Staff Development and Engagement
 - a. Maintain and strengthen a positive organizational culture grounded in the District's Guiding Principles.
 - b. Complete a comprehensive compensation study to ensure the District remains competitive in attracting and retaining qualified staff.

- c. Develop a formal succession plan that identifies workforce needs and outlines investments in staff training, professional development, institutional knowledge, and career advancement opportunities.
- d. Improve operational effectiveness by applying industry best practices and developing Standard Operating Procedures (SOP's) for all positions.
- e. Evaluate opportunities to responsibly integrate artificial intelligence (AI) tools to improve efficiency and support staff functions.
- f. Support professional growth by having the General Manager attend the CSDA General Manager Leadership Summit to engage in peer networking, gain insights into emerging trends, and strengthen leadership skills.

5. Effective Governance

- a. Support Board development by encouraging Board member participation in California Association of Sanitation Agencies (CASA) conferences to stay informed on industry trends, regulatory changes, pending legislation, and peer best practices.
- b. Ensure Board members complete the Special Districts Leadership Foundation (SDLF) Certificate in Special District Governance program, which includes:
 - i. Governance Foundations
 - ii. Setting Direction/Community Leadership
 - iii. The Board's Role in Human Resources
 - iv. The Board's Role in Finance and Fiscal Accountability
- c. Develop and implement a strategy to retain current Board members while cultivating community interest and establishing a pipeline of qualified future Board leaders.
- d. Implement a KPI program that enables the Board to monitor operational performance and long-term performance trends in support of effective oversight and accountability.

6. Further Stakeholder Engagement

- a. Establish and strengthen relationships with County, State, and Federal representatives to improve coordination, advocacy, and awareness of District needs, including:
 - i. County Supervisor, District 5 (Jim Desmond)
 - ii. State Assemblymember, 75th Assembly District (Carl DeMaio)
 - iii. State Senator, 40th District (Brian Jones)
 - iv. Congressional Representative, 48th District (Darrell Issa)
- b. Develop a District briefing booklet for representatives and their staff and invite them for a community tour or meeting at their local office. The briefing materials should:
 - i. Provide an overview of the Pauma Valley Community Services District (PVCSD)
 - ii. Highlight recent accomplishments
 - iii. Identify future initiatives, challenges and high-profile projects
 - iv. Share regulatory and legislative priorities
 - v. Identify opportunities for Grant support
- c. Engage with LAFCO staff on matters of mutual interest and improve understanding of the District's ultimate Sphere of Influence to support informed planning and service delivery.
- d. Clarify and coordinate service roles and responsibilities between the CSD and the Roadway Association to reduce community confusion and improve service effectiveness.
- e. Monitor and evaluate legislation and regulatory actions that may impact the District, and develop position letters to inform and advise elected representatives.
- f. Establish a "Partner of the Year" recognition program to acknowledge significant contributions from strategic partners and strengthen long-term stakeholder relationships.

IMPLEMENTATION FRAMEWORK

The Strategic Plan Implementation Framework is designed to support effective governance, accountability, and transparency. The Board uses the framework to monitor progress toward strategic objectives at a policy level, while staff maintain detailed workplans to manage day-to-day implementation. Timelines reflect expected time horizons rather than fixed deadlines, allowing flexibility to respond to changing conditions. Progress is evaluated using outcome-oriented success measures that emphasize results, sustainability, and public value. This approach ensures the Strategic Plan remains a living document that guides decision-making without constraining operational responsiveness.



1. Ensure Long-Term Financial Strength

OBJECTIVE		TIMELINE	RESPONSIBLE PARTY	SUCCESS MEASURES
a.	Develop and maintain a long-range financial plan aligning revenues, operating costs, reserves, and capital needs	Short–Mid Term	General Manager / Board	Financial plan adopted and updated annually
b.	Evaluate and incorporate appropriate short- and long-term financing strategies	Mid Term	General Manager / Board	Financing strategy approved; compliance with financial policies
c.	Achieve adopted operating reserve targets	Mid Term	General Manager / Board	Reserve levels meet or exceed policy targets
d.	Expand and diversify funding sources through grants	Ongoing	General Manager / Staff	Grant applications submitted; grants awarded
e.	Improve financial transparency through divisional accounting	Mid Term	General Manager / Staff	Divisional financial reporting implemented

2. Further Community Engagement

OBJECTIVE		TIMELINE	RESPONSIBLE PARTY	SUCCESS MEASURES
a.	Improve effectiveness of District communications based on customer preferences	Short Term	General Manager / Staff	Communications Plan adopted; preferences documented
b.	Increase public awareness of District services, performance, and accomplishments	Ongoing	General Manager / Staff	Regular newsletters and annual report published
c.	Expand and modernize communication channels	Ongoing	General Manager / Staff	Increased engagement metrics (website, social media)
d.	Increase District visibility at community events	Ongoing	General Manager / Staff	Participation in community events annually
e.	Maintain recognized transparency and governance practices	Ongoing	General Manager / Staff	SDLF Transparency Certificate maintained

3. Maintain and Improve Existing Infrastructure

	OBJECTIVE	TIMELINE	RESPONSIBLE PARTY	SUCCESS MEASURES
a.	Establish and maintain a comprehensive Capital Improvement Plan	Short–Mid Term	General Manager / Board	CIP adopted and updated annually
b.	Reduce infrastructure risk and system vulnerabilities	Mid Term	General Manager / Staff	Risk assessments completed; priorities identified
c.	Improve preventive maintenance and asset management	Short-Mid Term	General Manager / Staff	CMMS implemented; reduction in preventable SSOs
d.	Enhance system reliability and operational efficiency	Ongoing	General Manager / Staff	Improved service reliability indicators

4. Further Staff Development and Engagement

	OBJECTIVE	TIMELINE	RESPONSIBLE PARTY	SUCCESS MEASURES
a.	Strengthen and sustain a positive organizational culture	Ongoing	General Manager	Employee engagement and retention trends
b.	Maintain competitive compensation and benefits	Short Term	General Manager / Board	Compensation study completed; adjustments implemented
c.	Prepare the workforce for future needs through succession planning	Mid Term	General Manager	Succession plan adopted
d.	Improve consistency and effectiveness of operations	Mid Term	General Manager / Staff	SOPs completed and in use
e.	Enhance efficiency through responsible use of technology	Mid Term	General Manager	Documented efficiency improvements

5. Effective Governance

	OBJECTIVE	TIMELINE	RESPONSIBLE PARTY	SUCCESS MEASURES
a.	Strengthen Board knowledge of governance and industry issues	Ongoing	Board	Training and conference participation
b.	Ensure Board members complete formal governance training	Short Term	Board	SDLF governance certificates completed Defined Board leadership roles
c.	Develop/Retain future Board leadership capacity	Mid Term	Board / General Manager	Increased retention and interest in Board service
d.	Improve Board oversight through performance reporting	Short-Mid Term	General Manager / Board	KPI program implemented and reviewed regularly

6. Further Stakeholder Engagement

	OBJECTIVE	TIMELINE	RESPONSIBLE PARTY	SUCCESS MEASURES
a.	Strengthen relationships with County, State, and Federal representatives	Ongoing	General Manager / Board	Regular meetings and communications
b.	Improve advocacy and awareness through briefing materials	Short Term	General Manager	Briefing booklet completed and distributed
c.	Coordinate planning and service considerations with LAFCO	Ongoing	General Manager	Improved clarity on Sphere of Influence
d.	Clarify service roles and responsibilities between the CSD and the Roadway Association	Short Term	General Manager / Board	Mutually understood and documented service roles
d.	Monitor and respond to legislative and regulatory impacts	Ongoing	General Manager	Position letters prepared as needed
e.	Recognize and strengthen key stakeholder partnerships	Annual	General Manager / Board	Partner of the Year recognized annually

Timeline Definitions:

- Short Term: 0–12 months
- Mid Term: 1–3 years
- Long Term: 3–5+ years
- Ongoing: Continuous activities reviewed periodically
- Annual: Activities completed once per fiscal year

VITAL FEW

To more effectively and timely advance the goals of this Strategic Plan, a limited number of Vital Few objectives have been identified for focused attention and early achievement. These objectives represent the highest near-term priorities for the General Manager and are intended to accelerate progress during the initial implementation of the Plan.

Identification of the Vital Few does not diminish the importance of the full range of Strategic Plan initiatives. Rather, it recognizes that successful completion of these select objectives will have the greatest immediate impact on strengthening the District’s foundation and advancing overall plan success.

1. Develop and Implement a Long-Range Financial Plan

Develop and implement a long-range financial plan that aligns revenues, operating costs, reserves, and capital needs to ensure the District’s long-term financial sustainability.

2. Establish a Comprehensive Capital Improvement Plan and Asset Management Foundation

Establish a comprehensive Capital Improvement Plan and supporting asset management practices to address aging infrastructure, reduce risk, and improve long-term system reliability.

3. Implement a Districtwide KPI Program for Operational and Year-Over-Year Performance

Implement a Key Performance Indicator (KPI) program that provides the Board with clear, consistent insight into day-to-day operations and year-over-year organizational performance.

4. Stabilize and Strengthen the Workforce Through Compensation, Succession, and SOPs

Stabilize and strengthen the District's workforce through competitive compensation, succession planning, and standardized operating procedures to support operational continuity and service quality.

5. Improve Community Trust Through Clear, Consistent, and Transparent Communication

Improve community trust and understanding through clear, consistent, and transparent communication about District services, decisions, challenges, and accomplishments.

SCORECARD

The scorecard serves as a staff management tool for tracking detailed implementation activities that support the Strategic Plan. While it is not adopted by the Board, it provides the underlying detail that informs the simplified implementation framework.

For efficiency, the scorecard is integrated into the General Manager’s priorities report. Tasks identified in that report, along with their status, are cross-referenced to the Strategic Objectives they support, ensuring alignment between daily operations and adopted strategic priorities.

The table below provides an example of the revised General Manager’s priorities report incorporating the needed cross-references. Tasks identified with an “M” reflect mission-critical, ongoing operational responsibilities of the District. Tasks may support multiple priorities and ongoing operations as well.

Priority	Strategic Objective	Item	Status
High	5d	Maintain Daily District Operations/Execute & Maintain Policy Adherence and Assist Board Members as Needed	Ongoing
High	5d	Prepare monthly agendas, Board Letters, gather approval, attach relevant material, verify with legal all language is correct and governmental agency processes are adhered to – monthly meetings are extensive	Ongoing
High	5d	Update and Renew Reporting Data as the Legally Responsible Official for all Applicable Regulatory Agencies	Ongoing
High	5d	Respond to Board Requests for reports and additional information	Ongoing
High	4a, 4d	Handle and Oversee Human Resource related issues	Ongoing
High	M	Meet with all Board Directors to gather direction and goals quarterly	Ongoing
High	4d	Maintain Critical Failure Plan with correct contacts and potential situational occurrences	Ongoing
High	2a	Quarterly Newsletter creation and distribution	Ongoing
High	4c	Update/create Job Descriptions as needed and tools for staff management	Ongoing

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