

Heber Public Utility District Strategic Plan



Includes

Mission

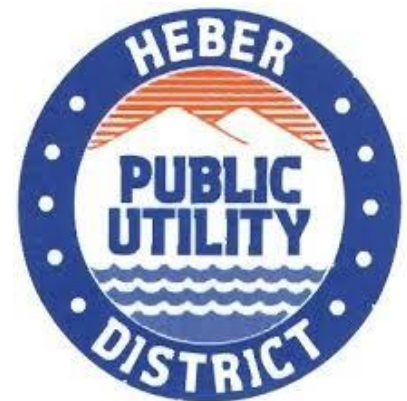
Vision

Values

Goals

Strategies

**2020
through
2025**



Prepared for the Heber Public Utility District by Management Partners



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Message from the Board of Directors



From left to right: Kaine Garcia; Pompeyo Tabarez, Jr; Martin Nolasco, Jr.; Tony Sandoval; and Moises Cardenas.

As Board members for the Heber Public Utility District, we are honored to share this Strategic Plan for our District with you. This project was initiated to provide insight and guidance as we address the many opportunities and challenges facing our community.

This Strategic Plan was developed by gathering input from the Board, staff, and community partners through individual interviews, a public survey, and a community forum. The Board has listened to the input of District residents in drafting and adopting this Strategic Plan.

Hard work lies ahead. The District is financially stable for the time being, but we are continuing to grow and evolve, requiring additional improvements and services. This plan outlines what we must do to remain financially strong and to increase the services desired by our rapidly changing community.

Achieving this Strategic Plan will require focus by the Board and staff, and support from the community. We hope you will join us in this effort.

Message from the General Manager

On behalf of the Heber Public Utility District, I am pleased to present this Strategic Plan. The Board of Directors and the employees of our District are committed to delivering exceptional service to the community.

This five-year Strategic Plan contains our mission, vision, values, goals, and prioritized strategies to achieve those goals. Through an extensive process that involved a broad cross-section of our community, we identified ways to continue to deliver the quality of services our community expects. However, many of the proposed improvements will be dependent on new sources of funding to pay for them.

We are committed to working in partnership with the community and our employees to continue to be an outstanding public utility district. Thank you for your support in this effort.

Sincerely,

*Laura Fischer
General Manager*



The Need for Strategic Planning



The Heber Public Utility District (HPUD) initiated this strategic planning process as a way to prioritize its work over a five-year period. As with other public agencies, capacity is limited, and it is essential that staff and budgetary resources be allocated to those projects and activities determined to be the highest priorities.

The District has evolved substantially over the years. We have become more engaged with the community, the value and complexity of capital projects has substantially increased, and the amount and types of programs and projects have broadened.

By undertaking a strategic planning process, the District has been able to ascertain its needs and opportunities and identify priorities to focus on for the next five years. The intent is to create the highest value for the District through the allocation of staff and resources.

Agency Overview

The Heber Public Utility District was formed in 1931 under the Public Utility Act of 1921. As an independent special district, it serves an estimated population of 6,600, in a 1.7 square-mile community located in Imperial County, California.

\$3.51M

operating budget for
FY 2019-20

14

Full-time
employees budgeted
for FY 2019-20



HPUD provides public services consisting of water treatment and delivery, wastewater collection and treatment, waste hauling via contracted services, and parks and recreation services to the residents of Heber.

HPUD is governed by a five-member Board of Directors who are elected by District voters. The General Manager reports to the Board of Directors and oversees the District's operations. The District has 14 budgeted full-time equivalent employees, with an annual operating budget of \$3,517,473.

Strategic Plan Implementation and Resources Needed

An **Implementation Action Plan** template accompanies this Strategic Plan in a separate document. It contains timelines for the strategies so the Board of Directors, District staff, and community will know when to expect the various actions described in this plan will be accomplished.

District staff will be **communicating their progress** on a regular basis to the Board of Directors and the community. The District will place progress reports on the District's webpage.

The Strategic Plan contains an ambitious work plan. As a **five-year plan**, care has been taken to ensure that to the extent possible, the items contained are scheduled throughout the five years, and not front-loaded.

Five-member
Board of Directors

Strategic Planning Process



Planning began with the Heber Public Utilities District Board Members.

The District, with assistance from Management Partners, conducted extensive research and community outreach between November 2019 through January 2020. This included:

- Individual interviews with all 5 Board members and 19 District staff and community members;
- A community meeting with six participants;
- A community survey with 11 respondents; and
- A strategic planning workshop with the Board of Directors and District staff.

Direction from the Board of Directors

Board members developed the mission, vision, organizational values, goals, and strategies that will guide the future of utility services in the area served by the District.

Stakeholder Input

Input from a variety of stakeholders was gathered, as follows:

- **Board Interviews.** Management Partners conducted individual interviews with each Board member, seeking their input about the District's vision, mission, values, goals and priorities.
- **Staff and Community Interviews.** Management Partners conducted individual interviews with District staff and community members gathering their input about the District's vision, mission, values, goals, and priorities.

This Strategic Plan was developed based on input provided through:

- *Direction from the Board of Directors*
- *Stakeholder interviews*
- *Community Meeting*
- *Community Survey*
- *Preparation of an Environmental Scan*
- *Strategic Planning Workshop*

- **Community Survey.** Seeking input from residents and businesses in the communities served by the District was essential in developing the Strategic Plan. Management Partners designed and administered a confidential online survey to obtain this input. The survey was distributed through emails, social media, and mail. Questions focused on the District's services, mission and vision.

Community Workshop

A community workshop was conducted to hear resident input. The workshop considered the District's strengths, weaknesses, opportunities, and challenges (SWOT); vision; goals and priorities.

Environmental Scan

An environmental scan was conducted using prior information prepared by the District. It provided essential information to guide the development of the Strategic Plan and was presented during the community meeting and the strategic planning workshop. This included the following:

- Budget information,
- Capital Projects Review,
- Board of Director's Input,
- Stakeholder Input,
- Community Input Meeting Results, and
- Community Survey Summary.

Strategic Planning Workshop

On January 21, 2020, the District's Board and staff conducted a strategic planning workshop to discuss the future of the organization. This was an opportunity to review the data gathered through interviews, surveys, community meeting, and the environmental scan. The Board heard from community members and as a result of these sessions, developed a mission and vision, a set of values, along with goals and associated strategies for achievement.

Mission and Vision



Mission

A mission is a statement of the purpose of the organization.

To provide the highest quality utility and park services with a focus on customer service and community.

Vision

The vision statement is aspirational with a focus on the future.

HPUD – providing outstanding public services and innovative leadership to enhance the Heber community.



Values



Values provide the basis for how the organization and its members will work to achieve the mission, vision and goals.

Values



Transparency

Innovation for efficiency

Teamwork and partnership

Customer service

Community first

Integrity

Excellence – highest quality standard

Goals



Four goals support the vision and mission.

Four Goals

Goal A.

- Improve and sustain Heber Public Utility District facilities and services

Goal B.

- Expand parks and recreation facilities and services

Goal C.

- Advocate for quality growth and development in Heber

Goal D.

- Shape Heber's community identity



Goal A. Improve and Sustain Heber Public Utility District Facilities and Services



The six strategies below will contribute to achieving the goal.

Tier 1 Strategies

1. Maintain utility and park facilities to ensure quality service delivery, including completing essential capital improvement projects and repairs.
2. Complete the Water and Sewer Master Plan project.
3. Develop a ten-year fiscal sustainability plan for the Heber Public Utility District.

Tier 2 Strategies

4. Incorporate new technologies and innovations to engage customers and improve efficiency.
5. Pursue grants, bonds and other revenues to minimize future rate increases.

Tier 3 Strategy

6. Continue fiscal sustainability efforts.

Goal B. Expand Parks and Recreation Facilities and Services



The four strategies below will contribute to achieving the goal.

Tier 1 Strategy

1. Provide a new interactive water feature or swimming pool in an existing or new park.

Tier 2 Strategy

2. Augment parks with additional facilities and/or programming for seniors and youth.

Tier 3 Strategies

3. Add a major new park to accommodate future growth.
4. Develop an indoor recreation center to serve all of Heber.

Goal C. Advocate for Quality Growth and Development in Heber



The five strategies below will contribute to achieving the goal.

Tier 1 Strategies

1. Support needed traffic safety controls and improvements for the Heber community.
2. Advocate for street and sidewalk improvements in Heber to meet current standards of safety.

Tier 2 Strategy

3. Encourage and support county approval of new quality-land use development projects in Heber.

Tier 3 Strategies

4. Encourage and support new business opportunities on Main Street and other appropriately zoned areas.
5. Consider initiating a feasibility study for incorporation by 2025.

Goal D. Shape Heber's Community Identity



The three strategies below will contribute to achieving the goal.

Tier 1 Strategies

1. Convene primary institutions and partners in Heber to support the goal of shaping Heber's community identity.
2. Sponsor or support an ongoing series of community events.

Tier 2 Strategy

3. Create and maintain a community calendaring and networking site.

Implementation



An Implementation Action Plan is an important accompaniment to this Strategic Plan. The Action Plan will contain implementation steps, assignments, a schedule, and funding parameters for each strategic initiative. It will be completed by District staff following adoption of the Strategic Plan. Management Partners has provided a template and draft to assist the District.

District staff will then report on progress of the strategic initiatives on a regular basis. Providing timely information to the Board and the community is important for both accountability and to engage the community in improving District operations.

Through annual reports and the District's budget process, the Board of Directors and District staff will ensure the initiatives in the Strategic Plan are pursued and achieved through the year 2025.

Conclusion



This Heber Public Utility District Strategic Plan establishes prioritized strategies for the next five years to meet the District's four overarching goals. The Plan articulates the organizational mission and vision of the District and establishes a set of values and goals as a guide for decision making. The associated Implementation Action Plan identifies projects and funding needs necessary to implement this Strategic Plan. New resources will be required for significant improvements to Heber's parks.

Accountability for the Strategic Plan will be provided through regular reports to the Board of Directors. Progress on the Plan will be reviewed annually, with updates as strategies are completed and as new issues emerge.

*New resources
will be required for
significant improvements
to Heber's parks.*

Attachment A – Identified Strengths, Weaknesses, Opportunities and Threats (SWOT)

The strategic planning process for the Heber Public Utility District included extensive information gathering from HPUD’s Board of Directors, staff, community partners, and residents through interviews, document review, an online survey and a community meeting. During this process, Management Partners asked all participating stakeholders to share their thoughts on the Districts’ strengths, weaknesses, opportunities and threats (SWOT).

Provided below are highlights of the top three items identified in each section of the SWOT analysis.

Strengths

- **Dedicated Board and staff.** Stakeholders indicated that members of the Board and District staff are committed to their work serving the community and its needs.
- **Public trust and engagement.** Stakeholders highlighted that HPUD is very engaged and active in the community by supporting events, conducting outreach and obtaining community input. There is a strong sense of public trust in the District.
- **Financially secure.** Stakeholders indicated that the District is financially strong given the different revenue streams they are receiving.

Weaknesses

- **County relations and control.** Stakeholders addressed that Heber is not a city and that HPUD does not have the governing powers to act as a city due to District limitations and county oversight.
- **Growth and traffic.** Stakeholders addressed growth in neighboring cities, including annexations approaching the District, which also increase traffic in Heber.
- **Staffing.** Stakeholders indicated that HPUD staffing level and capacity is small and that there is a challenge with increasing staff turnover.

Opportunities

- **Growth.** Stakeholders indicated there is an opportunity for HPUD to grow and continue developing the reputation of the community.
- **Development.** Stakeholders indicated that HPUD can also work to improve Heber parks including a new recreation center, as well as Heber street and sidewalk infrastructure.
- **New Markets/Employers.** Stakeholders shared that the District should look for more employers and service providers located in Heber.

Threats

- **County control and opposition.** Stakeholders addressed the county's control and opposition to the community's desire that Heber become a city.
- **Other cities annexing and growing towards Heber.** Stakeholders indicated that the continued growth of the area will impact Heber's quality of life, which includes infrastructure.
- **Growth and traffic.** Stakeholders shared that the increase of growth and traffic can increase the rise of crime and accidents.

