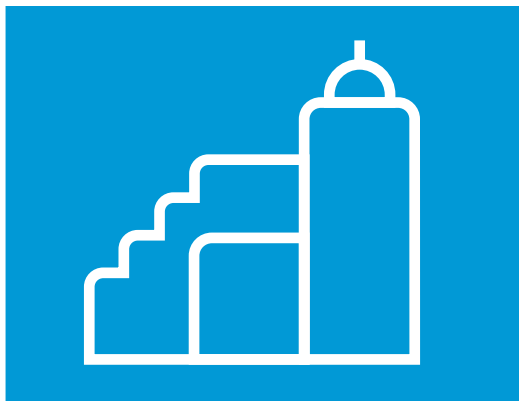
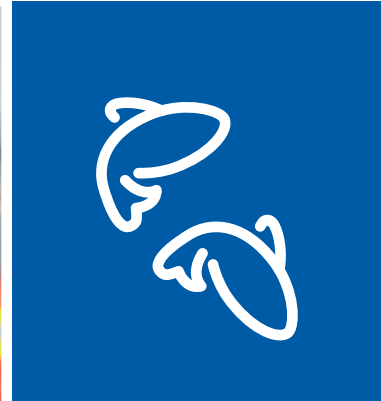
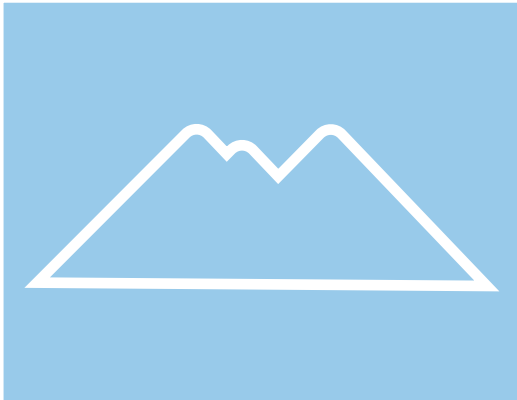


EAST BAY
MUNICIPAL
UTILITY
DISTRICT

economic impact 2026



Prepared for
East Bay Municipal Utility District

Prepared by
Laisar Management Group

Economic Impact Report,
Fiscal Years 2023–2025

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EXECUTIVE SUMMARY

EBMUD's economic contribution at a glance

Keeping water flowing, powering a stronger East Bay

EBMUD's investments extend far beyond delivering safe, reliable water and wastewater services. Every dollar we spend to operate, maintain, and improve our infrastructure also supports the East Bay economy. Those dollars generate billions in local economic activity, support thousands of jobs, and help advance community, environmental, and equity goals across Alameda and Contra Costa counties. This report examines that contribution across Fiscal Years 2023, 2024, and 2025.

A major engine of local economic activity

Across the three fiscal years studied, our operations and capital investments generated an average of approximately \$1.6 billion in economic activity each year across Alameda and Contra Costa counties—\$4.8 billion over the period combined. Measured as contribution to gross domestic product, the standard yardstick for the size of an economy, that activity added \$3.2 billion to the East Bay over the same three years.

That activity supported an average of 6,300 jobs each year: at EBMUD, among our contractors and suppliers, and in the neighborhood businesses that form the broader economic ecosystem. It also generated approximately \$754 million in labor income annually—dollars that flow directly into housing, food, transportation, childcare, healthcare, and other household essentials across the East Bay. And it produced about \$251 million a year in tax revenue for local, county, state, and federal government, paid on the activity our spending supports.

OVER FY 2023-2025

\$4.8B cumulative economic output, including

\$3.2B contributed to the East Bay's GDP

\$1 spent → \$1.50
in regional economic activity

ANNUAL AVERAGE

\$1.6B
economic output

6,300
jobs supported

\$754M
labor income

\$251M
tax revenue generated

How we create value



Investing in infrastructure and resilience

We invest in water and wastewater capital projects to modernize aging pipelines, treatment plants, and pumping facilities. Those projects contribute to the regional economy while preparing our systems for climate change, population growth, and seismic risk.

Operations driving the local economy

Our daily operations to provide high-quality water to our customers and treat wastewater are the larger of our two economic engines. This work runs every day of the year, whether or not a single new construction project breaks ground, providing a reliable stream of economic activity for the community.

Advancing equity through procurement

Through our Contract Equity Program, we expand opportunities for small, local, and diverse businesses to compete for and win work on EBMUD contracts.

Supporting quality jobs and career pathways

Our workforce of more than 2,000 employees represents stable, career-track employment in the communities we serve. Apprenticeship partnerships and workforce development programs expand access to those careers for the next generation of East Bay workers.

Protecting the environment and the Bay

Our investments in watershed protection, recycled water, wet weather facilities for stormwater management, pollution prevention, and climate resilience help protect public health, safeguard ecosystems, and generate lasting value for the community.



A Letter from Our General Manager

Stewardship is at the center of what EBMUD does.

It means managing the Mokelumne River watershed—90 miles of mountain snowmelt—so that it arrives safely at your tap. It means investing billions of dollars into pipelines, treatment plants, and infrastructure built to serve the next century. It means running a Contract Equity Program so that local, small, and minority-owned businesses share in the work of rebuilding this community's foundation. And it means doing all of this—every day, without exception—while keeping rates fair and transparent for every one of the 1.5 million people who depend on us.

This is EBMUD's first Economic Impact Report, and I am proud to share it with you. What you will find here is not simply data. It is the story of what serious, sustained public investment looks like—the 2,000 plus people who run this system around the clock, the capital projects reshaping the East Bay's water future, and the \$1.6 billion in regional economic output that EBMUD's work generates each year. Behind every number in this report is a career, a contract, a community more resilient. The East Bay's water story is one of the great acts of public foresight in California's history. We are its current stewards—and we take that responsibility seriously.

With gratitude,
Clifford C. Chan
General Manager
East Bay Municipal Utility District



A Letter from Our Board President

Together we are powering the East Bay Economy.

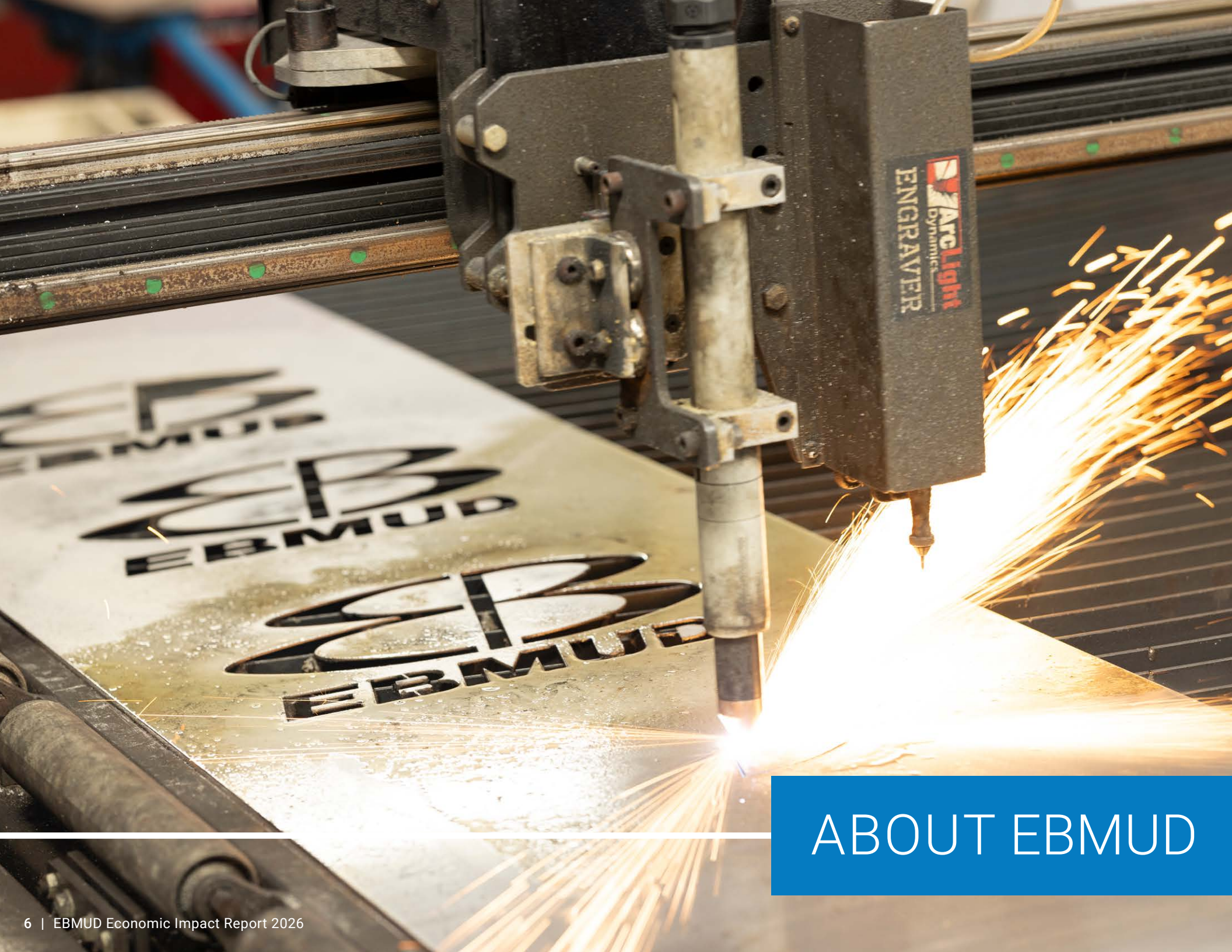
As an elected Board representing the communities of Alameda and Contra Costa counties, our role is to ensure that every rate dollar EBMUD collects is invested wisely: in infrastructure that will outlast us, in jobs that strengthen neighborhoods, in contracting practices that open doors for local and diverse businesses, and in environmental stewardship that protects the water and the Bay for generations to come. Together we have built an extraordinary public asset that belongs to all of us.

This Economic Impact Report demonstrates how the jobs created, businesses strengthened, and economic activity generated throughout the East Bay are an impressive return on your investment.

The Board is proud of what this report reflects, while remaining clear-eyed about the challenges ahead. Aging infrastructure, a changing climate, and the rising cost of doing business in the Bay Area require us to continue making thoughtful investments while maintaining fiscal discipline, transparency, and accountability. We owe you nothing less.

On behalf of the Board of Directors, thank you for the trust you place in us—and for the investment you make in this community every time you pay your EBMUD bill.

Sincerely,
Luz Gómez
President, Board of Directors
East Bay Municipal Utility District



ABOUT EBMUD



Our Scale, Reach, and Daily Impact

Where your water comes from

Ninety miles from your tap, in the Mokelumne River watershed in the Sierra Nevada, the water we deliver begins its journey as it travels through three aqueducts, then into about 4,200 miles of pipeline reaching 20 cities and 26 unincorporated communities.

By the time it reaches your faucet, it has passed through one of six treatment plants capable of processing more than 425 million gallons per day—and has been tested more than 20,000 times a year by EBMUD's laboratory staff to make sure it meets or surpasses every state and federal standard.

Wastewater treatment

For nearly half of our customers, we collect and treat about 50 million gallons of wastewater per day, cleaning it to rigorous environmental standards and returning it safely to San Francisco Bay. EBMUD treats wastewater from Alameda, Albany, Berkeley, El Cerrito, Emeryville, Kensington, Oakland, Piedmont and part of Richmond, making it one of the largest wastewater operations on the Bay and a critical line of defense for the ecosystem the entire region shares.

Your neighbors run this system

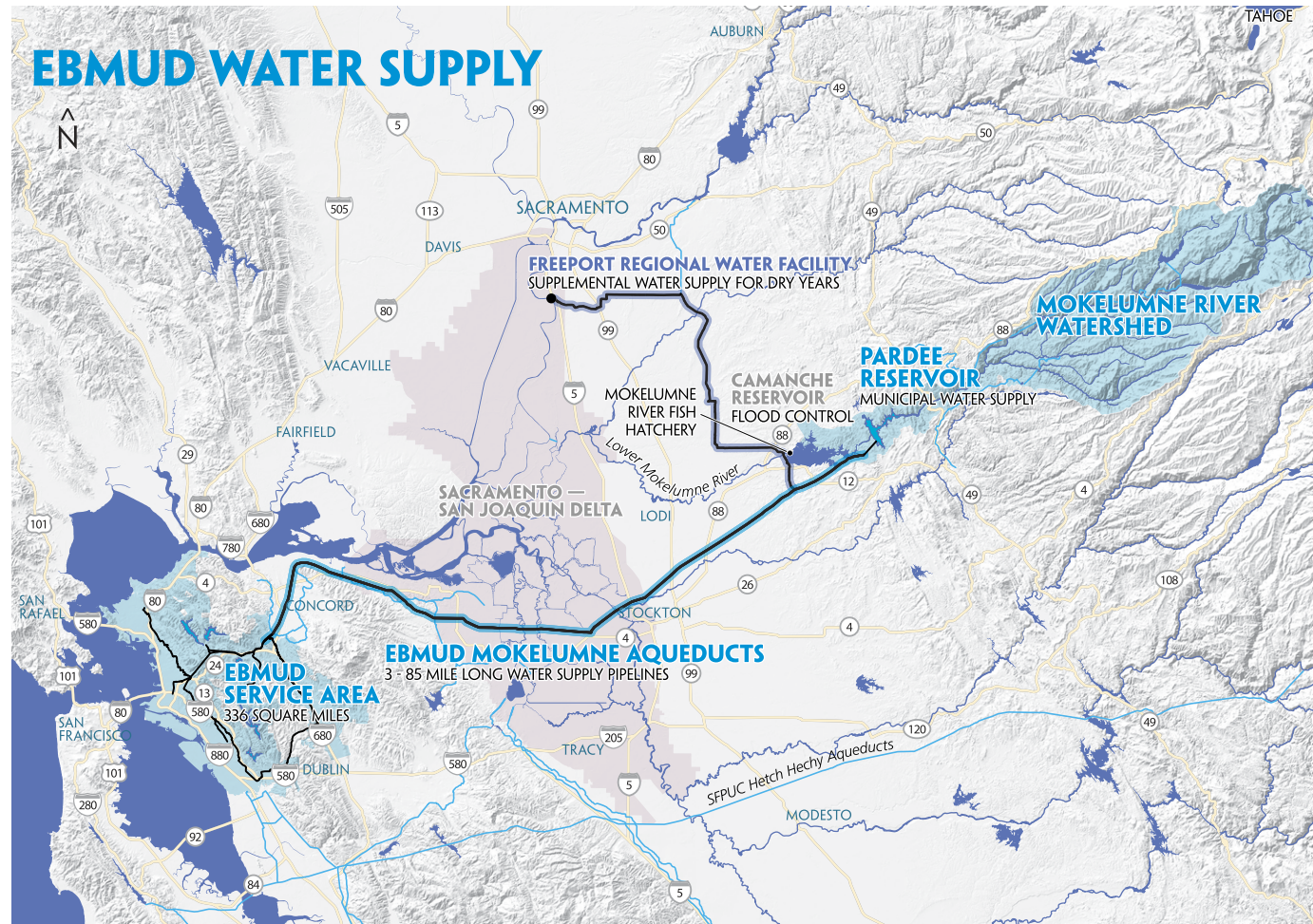
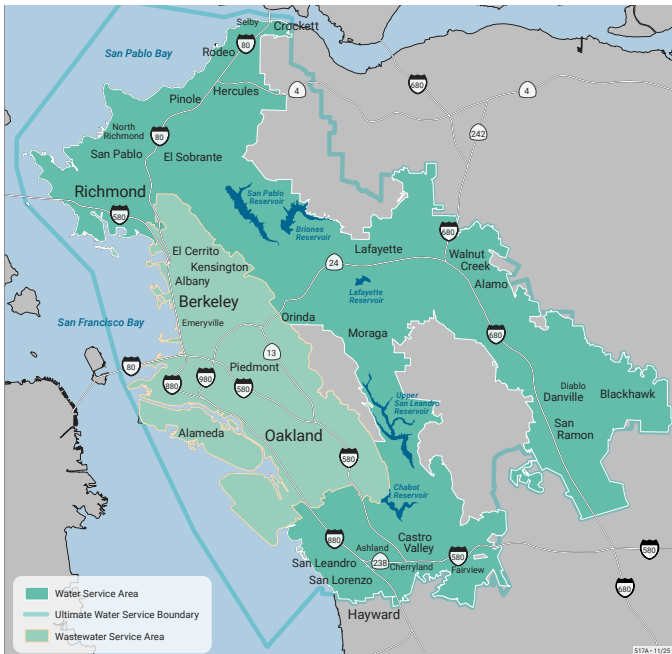
Behind every gallon is a person. More than 2,000 EBMUD employees run this system 24 hours a day, every day of the year—and 75% live within the communities they serve. They're your neighbors, and this is their work.

Accountable to the community, built to last

EBMUD is a not-for-profit public utility governed by a seven-member elected Board of Directors, accountable to the people we serve. Every dollar collected goes back into supporting our mission to protect public health and the environment. We hold Aaa bond ratings on our water system and AAA and AA1 bond ratings on our wastewater system, among the strongest of any public utility in the country, which helps us borrow at lower cost and invest more in long-term infrastructure, and is a reflection of how carefully this institution has been stewarded over a century of public service.

EBMUD by the Numbers

The scale of the system behind the impact



The people we serve

- 1.5 million water customers
- 740,000 wastewater customers
- 332-square-mile service area
- 20 incorporated cities + 26 unincorporated communities

The work we do every day

- 140 million gallons of drinking water delivered daily
- 50 million gallons of wastewater treated daily
- 9 million+ gallons of recycled water supplied daily
- 20,000+ water quality lab tests run annually

Our workforce and infrastructure

- 2,032 employees
- 4,200 miles of pipeline
- 6 water treatment plants
- 7 raw water reservoirs
- 140 pumping plants
- 170 neighborhood reservoirs
- 57,000 acres of protected watershed land managed

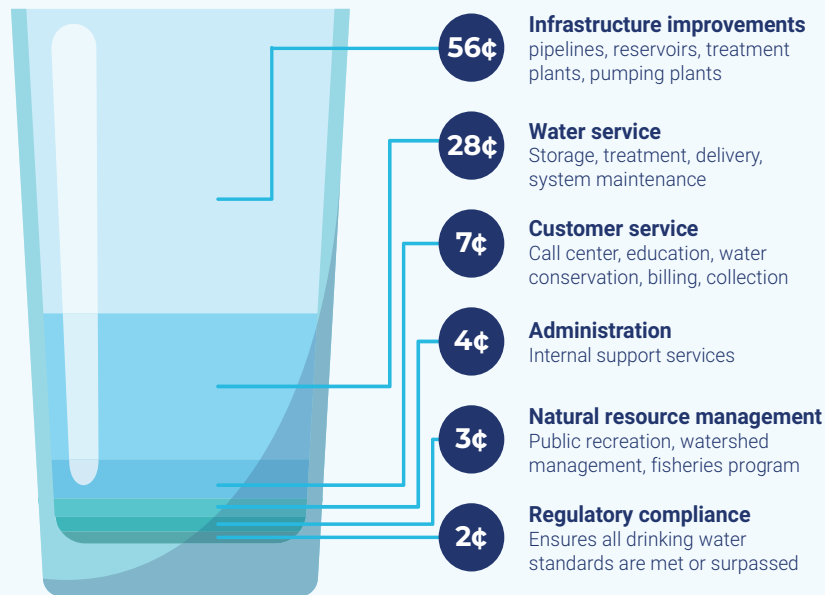
Your Rate Dollars at Work

Every bill that customers pay is a direct investment in this system: in the water and wastewater services they rely on, in the infrastructure that keeps those services reliable, and in the natural lands that protect source water and the Bay.

Your water rate dollar

We provide high-quality drinking water for 1.5 million customers in Alameda and Contra Costa counties.

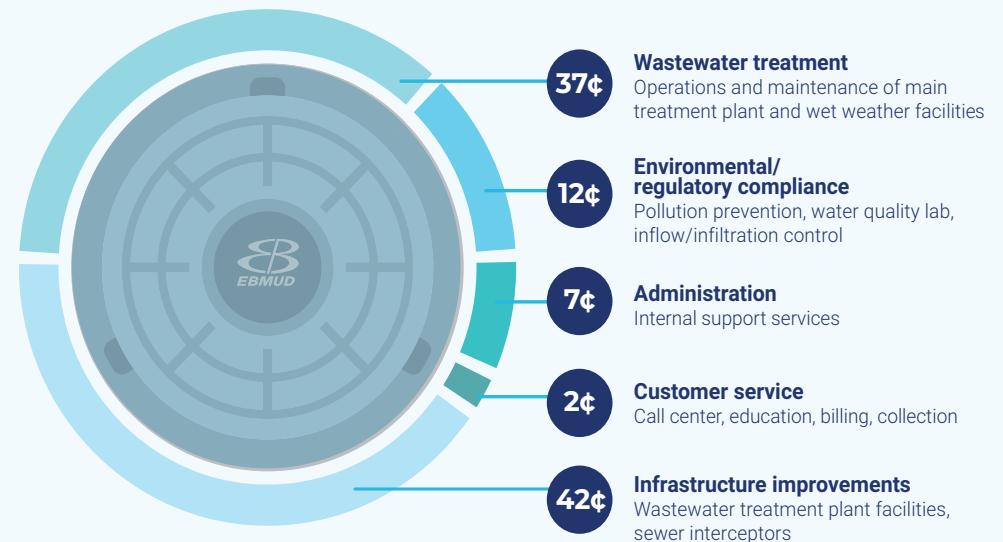
Each \$1 of your water rate goes to:



Your wastewater rate dollar

We treat approximately 50 million gallons of wastewater daily for 740,000 customers along San Francisco Bay, protecting public health and the environment.

Each \$1 of your wastewater rate goes to:



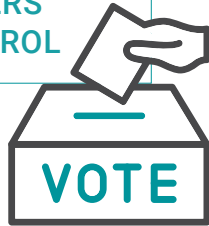
The chapters that follow trace what these investments mean for the people, businesses, and communities of the East Bay.

Impact Through the Years

A century of investing in safe water, a clean bay, and community benefits

For more than a century, EBMUD has turned community investment into long-lasting infrastructure, good jobs, and environmental stewardship. These milestones highlight how that commitment has grown alongside the East Bay.

▶ EARLY FOUNDATIONS: WHEN VOTERS TOOK CONTROL



1850s–1910s:

A growing region outpaces private water systems

As the East Bay's population surged past 150,000, private water companies struggled to keep up. Service was unreliable, quality inconsistent, and accountability low, setting the stage for a landmark public vote on water governance in California.

1923:

Voters create EBMUD as a public utility

East Bay residents vote to establish a publicly owned, publicly governed utility under California's Municipal Utility District Act, taking permanent control of their water future.

1951:

Wastewater treatment begins protecting the Bay

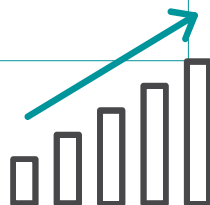
EBMUD's wastewater system comes online, establishing one of the region's first major protections for the San Francisco Bay and laying the groundwork for decades of environmental and economic activity along the waterfront.

1929:

Sierra water reaches the East Bay

Pardee Dam and the first Mokelumne Aqueduct deliver Sierra Nevada water 90 miles to the East Bay, launching an infrastructure system that supported reliable service for hundreds of thousands of residents and businesses.

▶ SCALING FOR GROWTH



1960s:

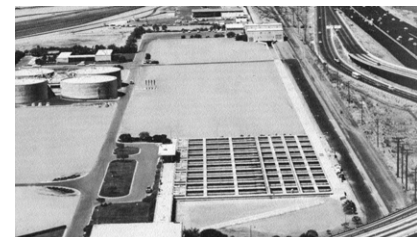
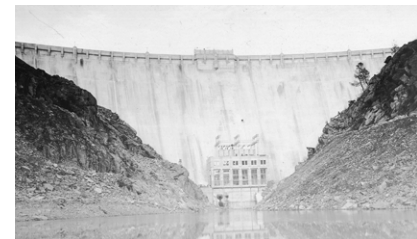
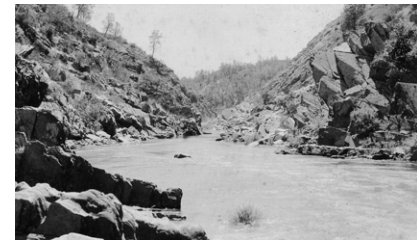
New reservoirs and public recreation

As the East Bay's population crosses 1 million, EBMUD opens new reservoirs and recreation areas, expanding public access to watershed lands that today draw over a million visitors annually.

1970s:

Long-range planning takes hold

EBMUD adopts its first comprehensive land use and water management plans, establishing the planning discipline that would guide infrastructure investments and their economic returns for the next half century while protecting watersheds and guiding responsible growth.





→ EQUITY, RESILIENCE, AND SUSTAINABILITY

The modern era of EBMUD's story reflects a shift from simply expanding infrastructure to ensuring that investment is resilient, inclusive, and sustainable.



1984:

Advancing opportunities for local businesses

EBMUD adopts a Minority and Women Business Enterprise policy, a foundational step toward the Contract Equity Program that today channels millions in contract dollars to small, local, and diverse firms across the region.

1990s:

Protecting watersheds and strengthening the system

EBMUD adopts updated water and watershed management plans and launches a Seismic Improvement Program to strengthen critical facilities and pipelines against earthquakes, protecting both service reliability and the regional economy.

2000s:

Investing in reliability and new water supplies

Major bond investments, the Freeport Regional Water Project, and upgrades to fish hatcheries, dams, and pipelines expand supplies, improve environmental performance, and support thousands of construction and operations jobs.

1998:

Contract Equity Policy and habitat protection

EBMUD formally adopts its Contract Equity Policy. The same year, it establishes a Habitat Conservation Plan to safeguard biodiversity on watershed lands, building on its institutional commitment to environmental stewardship.

1995–1999:

Recycled water and wet-weather protection

The North Richmond Water Reclamation Plant begins supplying recycled water for industrial cooling. EBMUD completes its Wet Weather Program to reduce sewer overflows during storms, improving bay water quality and neighborhood resilience.

2010s:

Conservation, recycled water, and clean energy

EBMUD's customers reduce per-capita water use even as the population grows, new recycled water facilities such as the Richmond Advanced Recycled Expansion come online, and wastewater and hydropower projects generate renewable energy that lowers operating costs and emissions.

2023:

A century of service

EBMUD marks 100 years as a community-owned utility, and enters its second century managing billions of dollars in capital assets, supporting thousands of jobs across the regional economy, and generating billions in annual economic activity. The institution voters created in 1923 is now one of the East Bay's most consequential economic anchors.

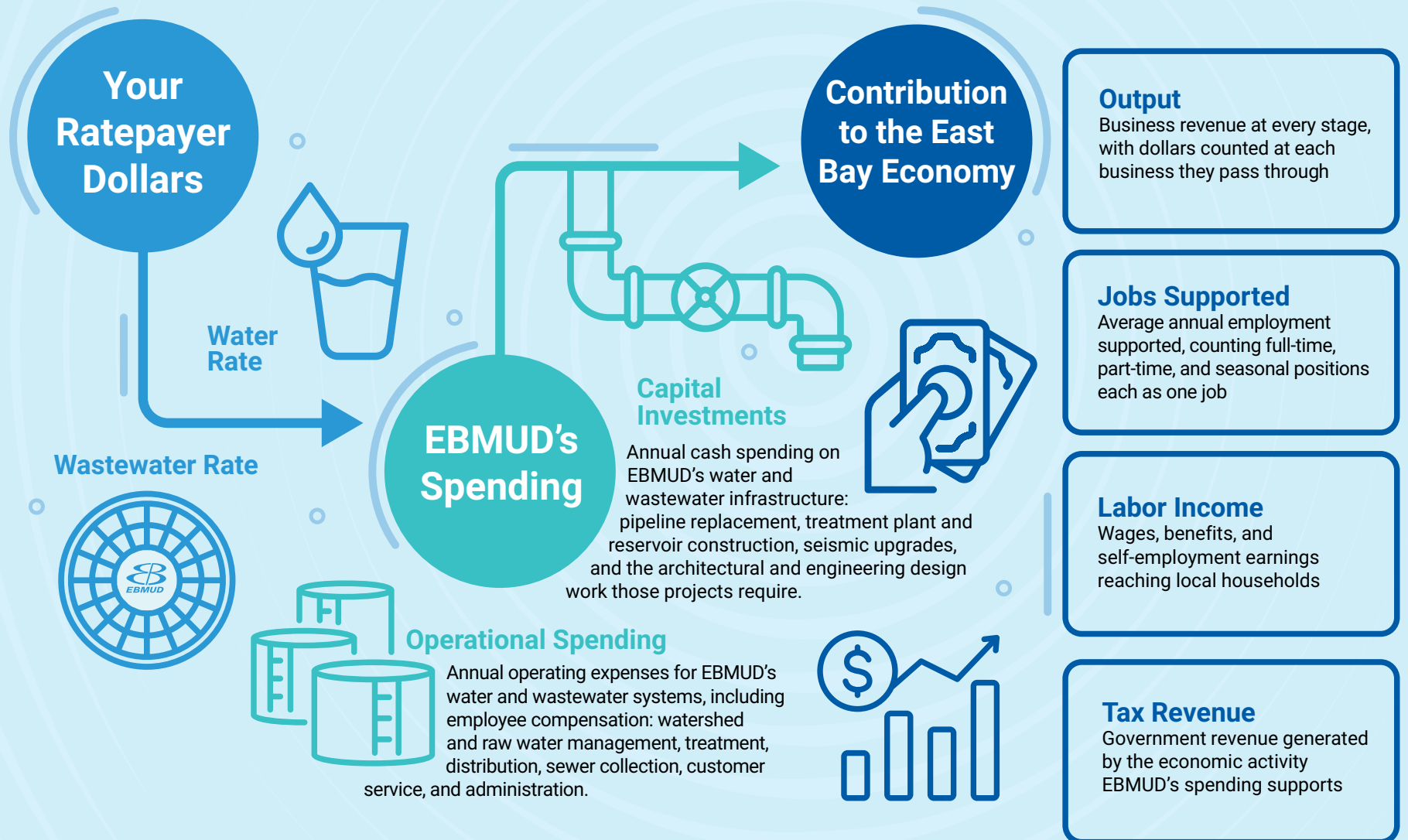




EBMUD'S ECONOMIC IMPACT

Your water bill at work – for the whole community

The water bill you pay does more than deliver safe, reliable water to your home or business. It also funds EBMUD's capital investments and operational spending. This analysis captures the effect of that spending as it circulates throughout the East Bay region to support thousands of jobs and contribute billions of dollars in economic activity.



How your rate dollars circulate in the regional economy

**\$1 spent →
\$1.50 total
economic
activity¹**

EBMUD's spending produces a ripple effect that supports additional activity for the local economy through direct, indirect, and induced effects. Think of it like dropping a stone in a reservoir: the first splash is the effect of EBMUD's own spending, and each ripple is another round of local economic activity.

By the time the ripples settle, every dollar EBMUD spends has circulated as about \$1.50 in total economic activity across East Bay businesses.



DIRECT

Effect of EBMUD's initial spending that enters the East Bay economy as payroll and benefits, purchases of goods and services, and investments in construction projects.

INDIRECT

Effect occurring when vendors and contractors purchase from their own suppliers in order to fulfill EBMUD's orders, generating business-to-business activity throughout the supply chain.

INDUCED

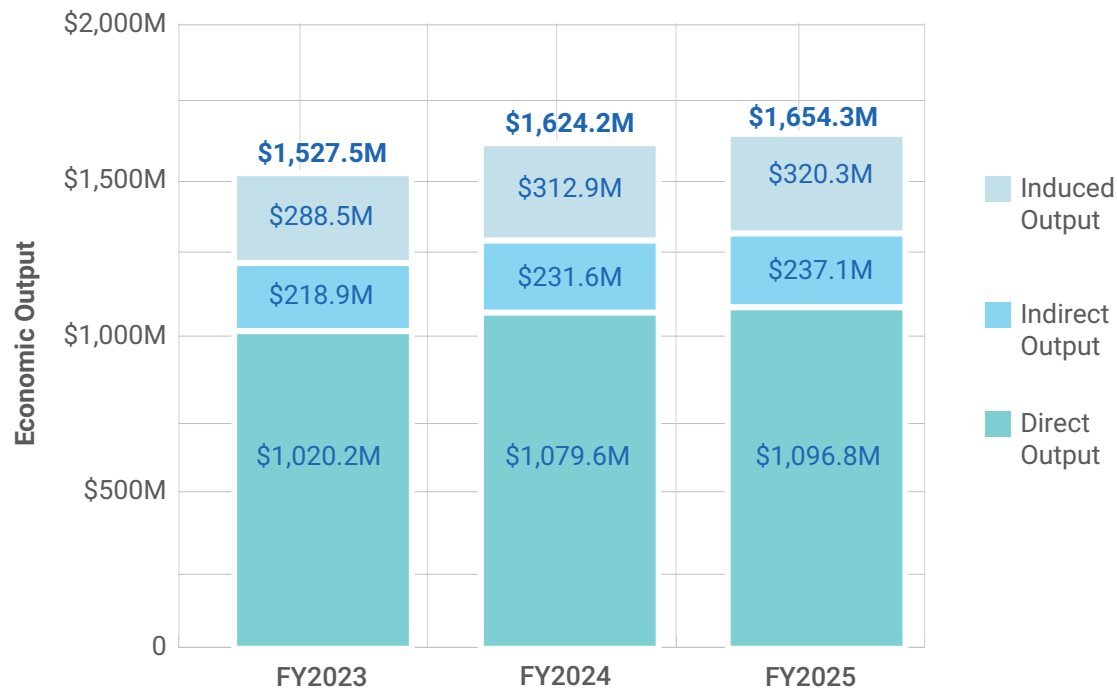
Effect occurring when EBMUD employees and workers throughout the supply chain spend their earnings locally in the community. The cycle continues as workers at community businesses then spend their own wages locally.

¹ Total output includes intermediate transactions (materials and services counted at more than one stage of the supply chain) and is therefore larger than the region's underlying economic production.

Growing impact, year after year

Our economic footprint grew in each year of the study period, for a cumulative \$4.8 billion in output generated for Alameda and Contra Costa counties.

Three-Year Output Trend



All economic results are expressed in 2026 dollars. IMPLAN applies industry-specific deflators to each fiscal year's expenditures, so year-over-year changes reflect real growth rather than inflation. Figures are rounded individually; totals are calculated from unrounded values and may not sum exactly.

From FY 2023 to FY 2025, total economic output grew 8% after adjusting for inflation. Growth occurred across all three tiers: direct output rose as we accelerated our capital program and added employees; indirect output climbed as the local supply chain absorbed more of our spending, and induced output grew as a larger workforce spent more in East Bay neighborhoods.

\$4.8B
in cumulative regional
output over FY 2023-2025

EBMUD's Employment Contribution

In FY 2025, our operations, capital projects, and supply chain activity supported 6,594 jobs across Alameda and Contra Costa counties, from construction crews and engineers to restaurant workers and childcare providers whose livelihoods depend in part on the paychecks our ecosystem generates.

How 6,594 Jobs Break Down:

Effect	What These Jobs Are	FY 2025 Jobs
 DIRECT	Jobs directly funded by our spending: payroll employees and the construction workers, engineers, inspectors, and contractors employed directly through our capital projects and operational procurement contracts	4,360
 INDIRECT	Supply chain positions: steel manufacturers, pipe suppliers, equipment dealers, engineering consultants, chemical distributors, and other businesses whose work depends on our contracts	841
 INDUCED	Community jobs sustained by household spending of our employees and supplier workers: restaurant employees, retail workers, healthcare providers, childcare workers, landlords, and service professionals	1,393
Total	All jobs supported across the regional economy	6,594

**Together,
these jobs
generated
\$783 million
in total labor
income for
East Bay
households
in FY 2025.**

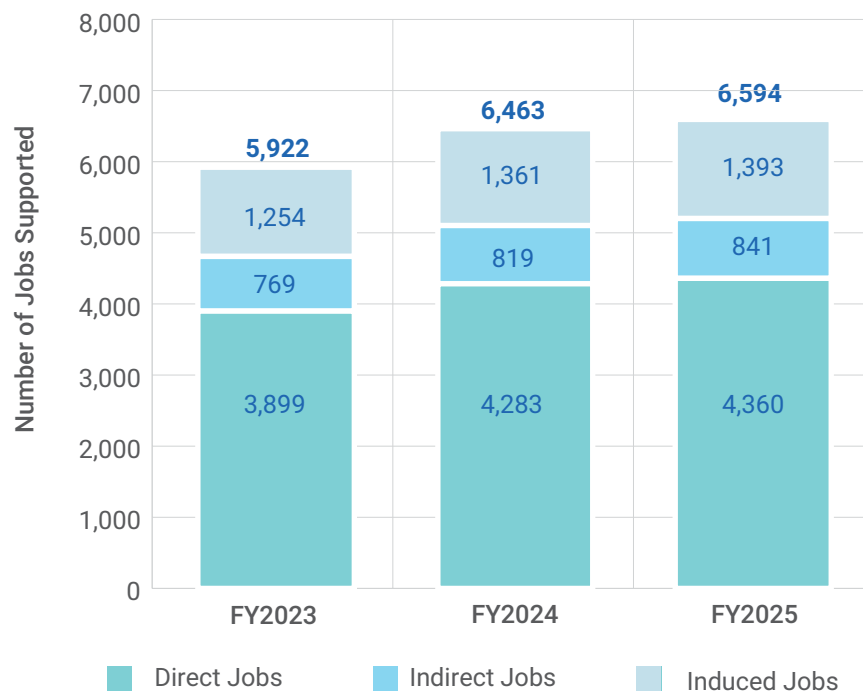
A growing workforce, a growing ripple effect

Between FY 2023 and FY 2025, total employment supported across the regional economy grew by approximately 672 jobs, an 11.3% increase, as our additional spending and new hires amplified employment throughout the supply chain and community.

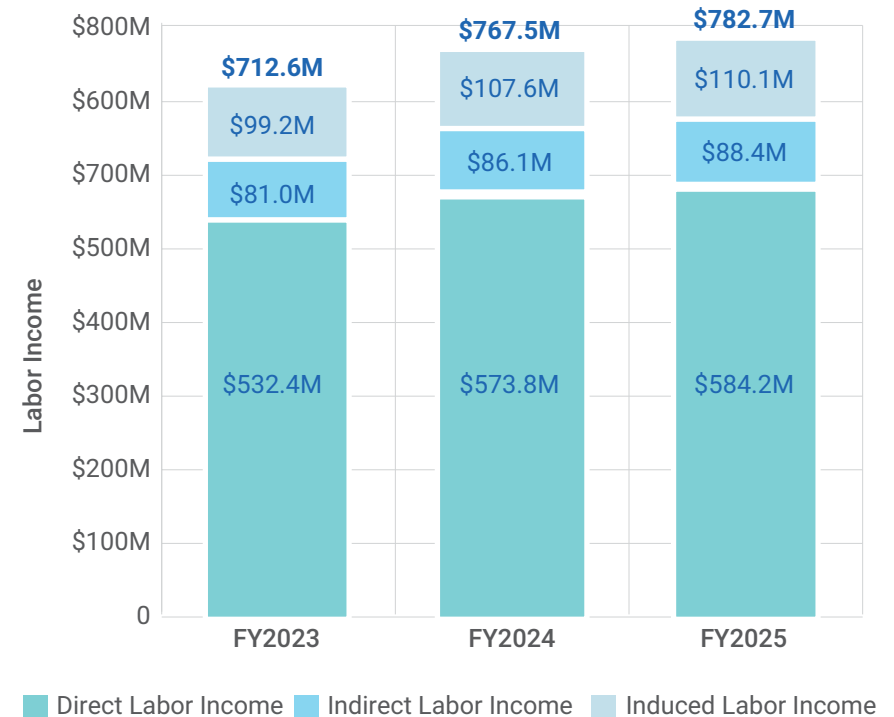
\$2.3B

in cumulative labor income
over FY 2023-2025

Three-Year Trend of Jobs Supported



Three-Year Trend of Labor Income



All economic results are expressed in 2026 dollars. IMPLAN applies industry-specific deflators to each fiscal year's expenditures, so year-over-year changes reflect real growth rather than inflation. Figures are rounded individually; totals are calculated from unrounded values and may not sum exactly.

\$752M

in cumulative tax
revenues over
FY 2023-2025

Tax-exempt, yet tax-generating

EBMUD is a public agency and pays no income or property tax. Even so, the economic activity our spending supports—through the businesses we contract with, the workers we employ, and the household spending our payroll supports—produced about \$752 million in tax revenue over the three-year study period, or roughly \$251 million per year. This includes payroll taxes on our own workforce alongside taxes generated throughout our supply chain and the wider community. Those revenues reach every level of government:

	FY 2023	FY 2024	FY 2025
CITIES AND TOWNSHIPS	\$12.7M	\$13.0M	\$13.3M
SCHOOL AND FIRE DISTRICTS	\$14.9M	\$15.2M	\$15.7M
COUNTY GOVERNMENT	\$9.8M	\$10.1M	\$10.3M
STATE OF CALIFORNIA	\$53.0M	\$55.7M	\$56.9M
FEDERAL	\$148.7M	\$159.6M	\$162.8M
Total Tax Impact	\$239.1M	\$253.5M	\$259.1M

Figures are rounded individually; totals are calculated from unrounded values and may not sum exactly.

The largest share, about 63%, flows to the federal government through income and payroll taxes on jobs we support. State revenues account for about 22%, funding California’s general fund, transportation, and education budgets. The remaining 15% stays closest to home—in county government, city and township budgets, and the school and fire districts that serve neighborhoods across Alameda and Contra Costa counties. Total tax revenues grew 8.4% over the study period, rising from \$239.1 million in FY 2023 to \$259.1 million in FY 2025. That increase tracks with the growth in employment and economic activity documented on the preceding pages.

What Drives This Contribution:

Two engines running at once

THE INFRASTRUCTURE ENGINE

Our capital program is the visible part of EBMUD's economic contribution: the construction projects that replace aging pipes, rebuild treatment plants, and modernize pumping stations and reservoirs across the region. Over three fiscal years, the capital program generated a cumulative \$2.69 billion in regional output.

THE OPERATIONS ENGINE

Our daily operations—treating the water that arrives at the tap, managing wastewater before it returns to the Bay, maintaining thousands of miles of pipeline, and protecting the watershed that makes this work possible—generated a cumulative \$2.12 billion in regional output. This engine runs 365 days a year, independent of new construction projects.



Together, these engines make EBMUD a major economic anchor in the East Bay. The pages that follow explore each one in more detail.



CAPITAL INVESTMENT AS ECONOMIC CATALYST

Building the East Bay Economy

Every dollar we invest in infrastructure adds more economic activity in the region.

When East Bay residents voted to create EBMUD in 1923, they established a community-owned utility responsible for building and maintaining the region's water and wastewater infrastructure. More than a century later, we are still expanding and renewing that infrastructure to meet today's demands.

In 2025, we adopted a 10-year Capital Improvement Program (CIP) that commits **\$5.6 billion to the water system** and **\$1.2 billion to the wastewater system**. Totalling \$6.8 billion over the decade ahead, it marks the most capital-intensive period in our history.

This capital investment is driven by four intersecting pressures:

- Aging infrastructure that has served the East Bay for generations and now requires systematic replacement
- Population growth placing new demands on facilities built for a smaller region
- Evolving environmental regulations that raise the bar for responsible water and wastewater management
- Climate change, from intensifying droughts to extreme storms to emerging contaminants in source water

Many of these investments are visible as EBMUD crews replacing pipelines, or construction cranes rising above treatment plants—but their effects extend well beyond the project site into jobs and business activity across the East Bay, strengthening the regional economy from the ground up.



\$2.69B

Cumulative regional economic output generated through EBMUD's capital investments



Ratepayer Impact

More than half of every water rate dollar—**56 cents**—goes directly to infrastructure. In FY 2025, EBMUD’s water capital spending supported over **3,300 jobs** and generated approximately **\$831 million** in regional economic activity.

Water system: investing in reliability, generating regional returns

EBMUD’s water capital program spending grew 10% over the study period, adjusting for inflation, as we accelerated work on aging pipelines, seismic upgrades, treatment plant improvements, and reservoir rehabilitation across the service area. These investments span the full infrastructure lifecycle, with the goal of building a water system that will serve the East Bay for generations to come.

Water System Capital Investment	FY 2023	FY 2024	FY 2025
CAPITAL SPENDING AS REPORTED (ACFR)	\$456.8M	\$517.7M	\$538.8M
MODELED SPENDING (2026 DOLLARS)	\$510.6M	\$557.5M	\$559.1M

The regional economic contribution grew alongside this higher level of investment. Total output and labor income generated by water capital both grew about 10% over three years, with labor income rising from \$356.7 million to \$392.8 million—an additional \$36.1 million reaching workers across Alameda and Contra Costa counties.

Economic Contribution	FY 2023	FY 2024	FY 2025
TOTAL ECONOMIC OUTPUT	\$754.2M	\$826.5M	\$831.3M
TOTAL JOBS SUPPORTED	3,067	3,362	3,382
TOTAL LABOR INCOME	\$356.7M	\$390.7M	\$392.8M

Figures shown as reported are EBMUD’s audited fiscal-year expenditures. Modeled spending adjusts those figures to 2026 dollars using IMPLAN’s industry-specific deflators, so that year-over-year changes reflect real growth rather than inflation. All results in this report are expressed in 2026 dollars.



WATER SYSTEM PROJECT HIGHLIGHT

Pipeline Rebuild: \$1.9 Billion Over 10 Years

We maintain over 4,200 miles of distribution pipeline across the East Bay, much of it installed decades ago and now approaching the end of its reliable service life. The Pipeline Replacement Program is a sustained, decade-long investment in replacing those pipelines before they fail, reducing water loss, preventing customer outages, and protecting the streets, properties, and environment surrounding aging mains.

Over the next ten years, we plan to replace nearly 300 miles of pipeline across Oakland, Berkeley, Richmond, Alameda, Castro Valley, Walnut Creek, Orinda, and more than a dozen other communities. For the regional economy, this is not a one-time construction event. It is a continuous deployment of construction jobs, contractor spend, and materials procurement that continues from one project cycle to the next.

For customers, the work happening beneath their streets is an investment in reliability they may rarely see but rely on every day: fewer main breaks, quicker service restoration after emergencies, and a water system better prepared for seismic risk and climate change in the decades ahead.

Pipeline
R&BUILD

Renew. Reinvest. Ready.



Ratepayer Impact

Forty-two cents of every wastewater rate dollar goes toward infrastructure that keeps San Francisco Bay clean. In FY 2025, EBMUD's wastewater capital spending supported **345 jobs** and generated **\$84.7 million** in regional economic activity, while reducing the risk of system failures that carry their own costs in emergency response, regulatory fines, and community disruption.

To see current EBMUD construction projects, visit ebmud.com/construction.

Wastewater system: protecting the Bay, powering the economy

Our wastewater capital program is smaller in dollar terms than the water program because it supports a different asset profile: one main treatment plant and a network of large-diameter interceptors rather than 4,200 miles of distribution pipeline. Spending also varies year to year with project timing.

Even with a smaller program, the stakes are similar. Every dollar we invest in wastewater infrastructure helps protect the San Francisco Bay from sewer overflows, maintain compliance with strict environmental regulations, and safeguard the public health of about 740,000 people in our wastewater service area. From large-diameter sewer interceptor rehabilitation to treatment plant upgrades, these projects protect the environment while generating economic activity in the region.

Wastewater System Capital Investment	FY 2023	FY 2024	FY 2025
CAPITAL SPENDING AS REPORTED (ACFR)	\$56.7M	\$62.5M	\$54.9M
MODELED SPENDING (2026 DOLLARS)	\$63.4M	\$67.3M	\$57.0M

Across the full three-year period, the program generated a cumulative \$278.2 million in total regional economic output and \$131.5 million in labor income.

Economic Contribution	FY 2023	FY 2024	FY 2025
TOTAL ECONOMIC OUTPUT	\$93.6M	\$99.8M	\$84.7M
TOTAL JOBS SUPPORTED	381	406	345
TOTAL LABOR INCOME	\$44.3M	\$47.2M	\$40.0M

Figures shown as reported are EBMUD's audited fiscal-year expenditures. Modeled spending adjusts those figures to 2026 dollars using IMPLAN's industry-specific deflators, so that year-over-year changes reflect real growth rather than inflation. All results in this report are expressed in 2026 dollars.



WASTEWATER SYSTEM UPGRADE HIGHLIGHT

Wastewater System Modernization: \$1.2 Billion Over 10 Years

Over the next ten years, we will invest \$1.2 billion to upgrade and modernize our wastewater system, including major improvements to large interceptor pipelines, pump stations, and treatment facilities, as well as the electrical and control systems that support daily operations.

Key projects already underway or planned include upgrades to the Emeryville Sewer Pipeline, Pump Station H in Oakland, the Constitution Way Pipeline in Alameda, and significant improvements at the Main Wastewater Treatment Plant. This work requires a steady flow of engineering, construction, and specialized services that supports skilled jobs, contractor activity, and supply chain demand across the East Bay economy.

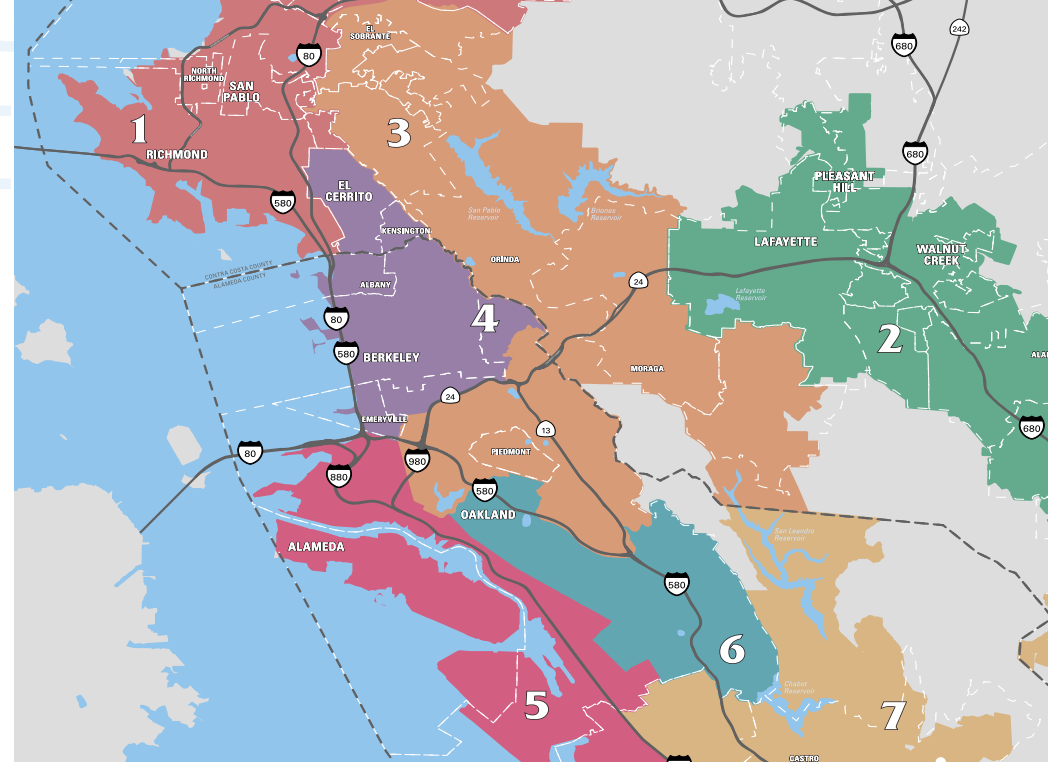
At the same time, these investments provide environmental benefits that extend well beyond the project sites. Major capital projects focused on advanced treatment processes are designed to protect the health of the San Francisco Bay by improving water quality and reducing pollutant discharges. By strengthening system reliability and environmental performance, our wastewater investments generate a dual impact—driving sustained economic activity while advancing long-term environmental resilience across the region.

Impact Where You Live

Here, we take a closer look at each ward in EBMUD's service area, highlighting the projects that reflect our commitment to delivering reliable infrastructure and community-focused investment where it matters most.

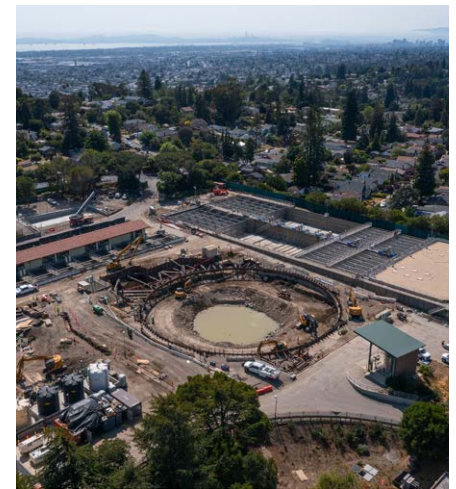
WARD 1 sits at the northern edge of EBMUD's service area, where older infrastructure is being modernized to keep pace with today's demands. In March 2024, we completed replacement of the original 5.4-million-gallon San Pablo Clearwell with two new 3.5-million-gallon concrete tanks, and we installed a new rate control station and 1,250 feet of transmission pipeline along Coventry Road in Kensington. Together, these improvements increase storage capacity, improve operational flexibility, and strengthen a treatment plant that can be called into service during peak demand or emergencies. Along with prior seismic upgrades at San Pablo Dam, this work helps ensure that communities from Kensington and Richmond to San Pablo and North Richmond receive reliable, high-quality water from facilities designed for the decades ahead.

WARD 2 is currently the site of a major dam safety investment. Construction began in March 2026 on the \$14 million seismic upgrade of the Lafayette Reservoir's outlet tower, a project required by the California Division of Safety of Dams to ensure this critical infrastructure can withstand a major earthquake and continue protecting downstream communities. In parallel, we are upgrading the reservoir's aging wastewater collection system and advancing a multi-year maintenance and reliability program at the Lafayette Water Treatment Plant, with chemical, control, and equipment improvements scheduled through 2031—reflecting the full scope of what it takes to safeguard one of the region's most valued public spaces while keeping a treatment facility serving hundreds of thousands of customers operating reliably and safely.



WARD 3 is home to two major recent investments in sustainability and water quality. In May 2024, EBMUD and TotalEnergies completed the 4.6-megawatt Orinda Photovoltaic Solar Energy Project, our largest solar installation, which generates about 10 million kilowatt-hours of clean energy each year and is projected to save ratepayers \$26 million in electricity costs over the next 25 years. Alongside that milestone, construction is more than halfway complete on the \$341 million Orinda Water Treatment Plant upgrade, adding state-of-the-art ultraviolet disinfection and a new chlorine contact basin to a facility built in the 1930s that today serves approximately 800,000 customers, with completion on track for 2027. These Ward 3 projects lower long-term power costs and strengthen water quality for customers throughout the area.

WARD 4 sits directly above the Hayward Fault, a major seismic fault, making earthquake resilience a central focus for our infrastructure investments in this ward. In August 2025, we extended our partnership with UC Berkeley's Center for Smart Infrastructure with a \$2.8 million Phase 2 agreement, funding 10 new research projects on seismic monitoring, pipeline crack detection, aqueduct lining technology, and earthen dam inspection. This research directly benefits the infrastructure beneath Ward 4 communities. Running alongside that research



investment, the active Wildcat Pipeline project is installing 2.6 miles of 36-inch transmission pipeline along Richmond Street in El Cerrito, improving water reliability for customers from Berkeley to Crockett and replacing aging infrastructure before the fault tests it.

WARD 5 is home to our Main Wastewater Treatment Plant, where biogas captured during treatment generates more electricity than the plant consumes, making it a net energy exporter and a nationally recognized model for sustainable utility operations. The 2023 completion of the Oakland Inner Harbor Crossing brought 3,000 feet of 32-inch earthquake-resistant pipeline beneath the Oakland Estuary, replacing 1940s-era cast iron pipe and securing water reliability for Oakland and Alameda residents for the long term. In anticipation of future nutrient regulations, EBMUD has set aside \$200 million in its 10-year Capital Improvement Program for a Nutrient Removal Project at the Main Plant, building on the staff-developed biological nitrogen removal process that already uses existing infrastructure to reduce nitrogen in the Bay's discharge by up to 65%.

WARD 6 encompasses East Oakland, where we are delivering both infrastructure upgrades and affordability programs to address service needs in the community. Pipeline replacement on East 29th Street, Excelsior Avenue, and Oceanview Drive is underway alongside the rehabilitation of Pump Station H, a 70-year-old wastewater facility serving Oakland's entire south interceptor, and the ongoing rehabilitation of the large-diameter sewer pipeline at the Oakland Coliseum. The Upper San Leandro Water Treatment Plant—built in 1927 and now the subject of a major modernization effort—is being upgraded to improve seismic safety, water quality, and drought resilience for communities across East Oakland and beyond, with completion targeted for Summer 2028.

WARD 7 stretches across the southern reaches of EBMUD's service area—from Castro Valley and Hayward to the San Ramon Valley—where aging infrastructure, groundwater sustainability, and water supply diversification are shaping our long-term management priorities. Active pipeline replacement work and the construction of new regulator facilities in Castro Valley are advancing system reliability, while the Miller Road site provides essential soil management logistics that keeps the broader pipeline rebuild program on schedule across the region.

Across all seven wards, our investments aim to strengthen the communities, infrastructure, and environment they touch. From pipeline replacement to innovations that protect the Bay and lower long-term costs, this demonstrates that engineering excellence, environmental stewardship, and fiscal responsibility are not competing priorities—they are how we define our work.

Upcountry Operations: Where Our Water Begins

Most of our drinking water begins more than 100 miles away in the Sierra foothills, where the Pardee and Camanche Reservoirs capture flows from the Mokelumne River before they travel through the Mokelumne Aqueduct to the East Bay. EBMUD's upcountry operations manage this supply at its source: storing water, operating dams and hydropower facilities, and coordinating river flows with state and federal partners.

At Pardee and Camanche, our teams run a 24-hour operation that keeps water moving while supporting flood control, downstream fisheries, recreation, and renewable power generation. The hydropower facilities in this system produce clean electricity that helps offset part of our energy use and puts power on the regional grid.

These facilities also anchor a recreation economy for nearby communities around Valley Springs, Lodi, and the Lower Mokelumne corridor. Campgrounds, marinas, and day-use areas draw visitors from across the state, supporting local jobs in operations, hospitality, and outdoor services.

A portion of every EBMUD bill helps keep dams, aqueducts, treatment plants, and powerhouses in working order, so water from the Sierra arrives reliably at the tap, year after year.

► Capital Investment

Over the decade ahead, our investments in these facilities will continue to connect Sierra communities and the East Bay through shared infrastructure, jobs, and recreation. Planned capital projects include the Pardee Chemical Plant Improvements Project—a more than \$46 million effort to install a new lime system at the Valley Spring plant to enhance water chemistry—and Mokelumne Aqueduct relining work to replace aging cement mortar lining and protect the pipeline that carries Sierra water to the East Bay.



► Supporting Local Business

For over 125 years, the Greater Stockton Chamber of Commerce has been the authoritative voice in all business matters throughout the Central Valley. The Chamber's mission is to aggressively develop and promote an economically vibrant business community.

"EBMUD has been a member of the Greater Stockton Chamber of Commerce for the past 34 years and been a great partner to Stockton and San Joaquin County far longer than that. Recently, through the DREAM Project, they helped to diversify water supplies, enhance drought resilience, and restore a depleted aquifer through groundwater recharge. EBMUD protects and conserves our land and vital water resources, ensuring our businesses and residents have access to a consistent supply of clean water."

– Timm Quinn, CEO,
Greater Stockton Chamber of Commerce



► Workforce Development

EBMUD's Mokelumne High School Summer Internship (HSSI) Program introduces local students to careers in fisheries, ranger services, and facilities maintenance through hands-on experiences at sites in Stockton, Lodi, and Valley Springs. Interns shadow wildlife and fisheries biologists, hydrographers, water system inspectors, treatment plant specialists, and rangers and naturalists; tour electrical, mechanical, and instrumentation shops and the fish hatchery; and participate in professional development sessions – among a range of activities designed to give students a real look at public water sector careers.

Pictured: 2025 Mokelumne HSSI interns touring the hydroelectric pumping plant



OPERATIONS DRIVING
THE LOCAL ECONOMY

The Operations Behind Your Water: Every day. Every shift. Every community.

The economic story of our work is not just told in construction sites and capital budgets. It is told every day in the paychecks of more than 2,000 dedicated employees, in contracts with local suppliers and engineering firms, and in the energy purchases and equipment maintenance that keep water flowing and wastewater treated around the clock.

Over the three fiscal years studied, these activities generated a cumulative \$2.12 billion in total regional economic output. Given what it takes to treat 140 million gallons of water a day, maintain 4,200 miles of pipes, and operate a major wastewater treatment system on the San Francisco Bay, that scale is expected.



Your rate
dollar at
work

44 cents of each water dollar and **58 cents** of each wastewater dollar are spent on operations—including water service, wastewater treatment, customer service, natural resource management, administration, and environmental/regulatory compliance.



\$2.12B

Cumulative economic
output supported by
EBMUD's operations
spending



The operational engine of regional economic impact

Our operational spending reaches deep into the regional economy. Every day, we treat roughly 140 million gallons of drinking water, manage about 50 million gallons of wastewater, maintain 4,200 miles of pipelines, and steward 57,000 acres of watershed lands. Delivering that level of service requires a skilled workforce plus sustained spending on chemicals, energy, equipment, and professional services, purchased largely from suppliers and contractors in the region. This spending supports jobs and labor income well beyond our own payroll.

Operational Spending	FY 2023	FY 2024	FY 2025
OPERATING EXPENSES AS REPORTED (ACFR)	\$404.6M	\$427.0M	\$465.8M
MODELED SPENDING (2026 DOLLARS)	\$446.2M	\$454.8M	\$480.7M

In FY 2025, our operations generated \$738 million in total regional output and \$350 million in labor income across the East Bay economy. After adjusting for inflation, this represents a 9% increase in economic output and a 12% increase in labor income compared with FY 2023, reflecting growth in the workforce and operational spending needed to meet evolving infrastructure, regulatory, and service needs across both systems.

Economic Contribution	FY 2023	FY 2024	FY 2025
TOTAL ECONOMIC OUTPUT	\$679.7M	\$697.9M	\$738.2M
TOTAL JOBS SUPPORTED	2,475	2,696	2,868
TOTAL LABOR INCOME	\$311.6M	\$329.6M	\$349.9M

Figures shown as reported are EBMUD's audited fiscal-year expenditures. Modeled spending adjusts those figures to 2026 dollars using IMPLAN's industry-specific deflators, so that year-over-year changes reflect real growth rather than inflation. All results in this report are expressed in 2026 dollars.

A Nearly 40-Year Promise: The Customer Assistance Program

13,200 households served and \$4.6M in credits delivered in 2025

In 1987, EBMUD looked at its rate structure and recognized that for some households, even a fair bill can still be out of reach. We created the Customer Assistance Program (CAP) to help close that gap.

CAP provides income-qualified single-family residential customers with an 80% discount on water charges and a 35% discount on wastewater charges, funded entirely through non-rate revenue. No ratepayer dollars underwrite it. Over nearly four decades, the program has grown with the communities it serves: adding homeless shelters in 1997, wastewater benefits in 2011, and sewer credits for Oakland, Emeryville, and Berkeley customers between 2021 and 2022. In 2023, we expanded CAP into a five-pillar support system that combines financial assistance with water-use management, education, program equity, and community partnerships.

In 2025, **13,200 households** received CAP benefits, a 66% increase over 2019 enrollment. We made access easier by cutting application processing to one to three business days, adding multilingual support, and holding on-site enrollment events in neighborhoods with the greatest need. In total, customers received **\$4.6 million in credits**, averaging roughly **\$350 per household** for the year.

CAP is one way we balance the need for financially sustainable rates with the need to keep service accessible.

When Crisis Strikes: The Water Lifeline Program

CAP reduces the ongoing cost of water for households living with financial hardship. The Water Lifeline Program is designed for a sharper moment. Launched in 2018 and administered through RCF Connects, the Water Lifeline Program provides additional financial assistance to CAP-enrolled customers facing a sudden crisis. It is funded not through the District's operating budget, but by EBMUD employees themselves through an annual giving campaign. If CAP works upstream by reducing costs before a crisis takes hold, Water Lifeline steps in when a household is at the point of emergency.





A Major East Bay Employer

With more than 2,000 employees, EBMUD is one of the East Bay's largest public employers. About three out of four EBMUD employees report to work sites in Alameda and Contra Costa counties, and roughly the same share live there too, so most of our paychecks are earned and spent in the same communities we serve.

In FY 2025, EBMUD paid \$477 million in total compensation to its workforce across operations and capital projects. That is a 16% increase in nominal terms since FY 2023, outpacing the 4.6% growth in headcount over the same period—a difference that reflects wage growth, benefit costs, and changes in the mix of positions across the District.

Behind that payroll is a workforce spanning water and wastewater operations, engineering, environmental science, trades, finance, customer service, and public affairs—careers at many skill levels, across the many disciplines a modern water utility requires.

More than 90% of our employees are represented by unions, reflecting the wages, benefits, and long-term stability that make EBMUD careers a meaningful economic asset for many East Bay households.

\$477M

**in total
compensation
paid to EBMUD
employees in
FY 2025, a 16%
increase since
FY 2023**

We offer careers for people from all backgrounds, from water quality analysts and field technicians to engineers, financial professionals, and community liaisons. Learn more at ebmud.com/jobs.

Career Pathways & Economic Opportunity

A Workforce Built for the Communities We Serve

Many of the people who protect the East Bay's water found their way into this work through a deliberate, multi-stage system built not to fill positions, but to create careers.

Our more than 2,000 employees span water and wastewater operations, engineering, environmental science, trades, finance, customer service, and public affairs. The Diversity and Inclusion Office, under the Office of Diversity, Equity, and Culture, manages the District's Workforce Development programs. Our long-term Workforce Development Strategy, or GULF, is intended to:

- G** Generate interest in water and wastewater careers;
- U** Unlock untapped talent by cultivating partnerships with community organizations and educational institutions;
- L** Link people to resources that prepare them to enter the labor market and compete for District employment; and
- F** Foster connections with the community using enhanced outreach to develop a pipeline of diverse, qualified applicants.

EBMUD uses merit-based hiring practices and the Diversity and Inclusion Office ensures that enhanced and inclusive outreach is conducted, including for individuals with disabilities (IWDs) and protected veterans. In 2024, EBMUD exceeded federal hiring benchmarks for both groups. IWDs were hired at a rate of 7.16%, above the 7.0% benchmark, with an incumbency rate of 9.66%. Protected veterans were hired at a rate of 5.02%, exceeding the 3.20% benchmark.

That outreach runs deep. Each year, staff in the Diversity and Inclusion Office participate in or coordinate at least 40+ specialized job fairs and expos, present at California community college conferences, and produce "Day in the Life" video campaigns that show prospective applicants what careers in water look like. In 2024, we launched Workforce Development Month, an initiative to raise awareness of careers in water and wastewater and our long-term Workforce Development Strategy and programs, and to deepen connections with community partners.



"At EBMUD, investing in our people is how we deliver on our promise to the East Bay. We build this organization from within—developing local talent, creating career pathways, and ensuring our teams reflect the communities they serve. A water system is only as resilient as the workforce behind it."

— Derry Moten,
Special Assistant to the
General Manager, EBMUD

Learning the System, Training the Next Generation

Michael Rangel

Manager of Distribution Maintenance and Construction

25 Years with the District

Michael Rangel has grown up with EBMUD. He joined the District at age 21 as a Plumber I, working in the field digging ditches and repairing water mains. Along the way, seasoned co-workers taught him not only the skills of the trade, but also the professionalism, teamwork, and work ethic that would shape his career. Those early mentors gave him a front-row seat to what it truly means to lead and what it takes to earn the trust of the people working alongside you.

In 2002, Michael was part of the very first graduating class of EBMUD's Pipeline Training Academy (PTA). The PTA combined classroom instruction, shop work, and field rotations—the District's own version of an apprenticeship, designed to develop well-rounded plumbers from the ground up. For Michael, it was where a career in water stopped being a job and started being a calling. To this day, he still enjoys working alongside classmates from that first cohort.

As he advanced through the plumber series to journey-level, Michael did not shy away from difficult assignments. A superintendent in East Area Service Center took notice, mentoring him into a broader view of how the District operates, board decisions, ratepayer stewardship, emergency response, and public trust. That guidance helped him move into Superintendent roles across multiple service yards, each step deepening his understanding of the system he had spent years working on and how to work effectively with people while supporting ever-changing needs and priorities.

Today, as Manager of Distribution Maintenance and Construction, Michael leads hundreds of staff across multiple area service centers and oversees the Pipeline Training Academy he once graduated from. The PTA's mission remains what it was in 2002: develop well-rounded plumbers using a curriculum of classroom learning, shop training, and rotations through different departments. Michael now uses his own journey to coach emerging leaders—pushing them toward hard assignments, modeling accountability, and giving them the same aerial view of the District that was once given to him.



"I started here 25 years ago, and I am still grateful and dedicated to putting in the work and supporting my Team."

Professional Development

New employees at EBMUD enter a structured continuum of internal programs designed to advance their skills at every stage of their career. These programs are the architecture of how we develop our own talent from the ground up.

► Pipeline Training Academy (PTA)

The Pipeline Training Academy is a foundational requirement for Water Distribution Plumbers, providing structured on-the-job training alongside technical instruction that prepares entry-level staff to advance through the plumber classification series toward journey-level status. Completion of the Academy is a prerequisite for promotion from Plumber I to Plumber II and is the first formal credential in a long-term field career pathway.

► Water and Wastewater Operator-in-Training Academy

The Operator Trainee program places entry-level participants in a structured learning environment where they gain hands-on experience working under the direct supervision of journey-level operators across water treatment and distribution systems. Trainees complete home-study coursework alongside field assignments to prepare for state certification examinations and eventual permanent classification as licensed operators.

► Heavy Equipment Operator Training

This newer addition to our internal trades training suite provides structured instruction for employees working with heavy equipment in pipeline construction and maintenance operations. It supports both safety compliance and career advancement for trades staff managing infrastructure in the field.

► MAST: Managers and Supervisors Training

MAST is our core leadership development program, a two-level curriculum designed to strengthen the emotional intelligence, communication, and management competencies of supervisors, foremen, managers, and senior leaders across EBMUD.

► Leadership Development Academies: Lead, Pathways, and Management Leadership

Complementing MAST, we operate a series of cohort-based leadership academies designed for employees at multiple levels who are preparing for expanded responsibility. These programs develop the next tier of District leaders through structured curriculum, mentorship, and developmental assignments, creating a visible and accessible internal pathway from individual contributor to manager. One example is the Peralta Cohort Program, in which District students earn accredited units through classroom and work experience facilitated by instructors at the Peralta Community College District, leading to participant promotions such as Heavy Equipment Mechanic to Equipment Supervisor.

Our General Manager, Clifford C. Chan, joined EBMUD in 1997 as a Junior Engineer, with degrees in civil and geotechnical engineering from UC Berkeley and experience in consulting. Over nearly three decades, he advanced through roles in operations, water treatment and distribution, maintenance, and construction. Along the way, he completed EBMUD's internal Management Leadership Academy—a program designed to develop the District's next generation of senior leaders from within—before becoming EBMUD's 10th General Manager in 2020, the first Asian American to hold the role.

The Pipeline: From Classroom to Career

Workforce development at EBMUD starts in high school hallways, community college classrooms, and pre-apprenticeship training centers and it runs through a coordinated set of Workforce Development internship programs managed by our Diversity and Inclusion Office. Together with community partners, we build a workforce that reflects the communities that we serve and lay foundations for the next generation of water stewards.

EBMUD's internship programs fall into two categories: direct internships, in which participants are hired directly by EBMUD into part-time or limited-term roles, and sponsored internships, in which participants employed by partner organizations are placed at EBMUD. Our internship programs not only provide valuable hands-on learning and training experience for the interns, but also provide opportunities for District staff to develop and/or strengthen their mentorship and supervisory skills.

Direct internship programs offer 46 funded positions annually across classifications including Engineering Aide, HR Intern, IT Intern, Special Employment Program (SEP) Trainee, Ranger Naturalist, and Student Intern. The Diversity and Inclusion Office strives to fill all 46 funded positions each year to expand access to professional opportunities for the communities we serve, and to help more interns build the skills and professional relationships needed for successful water and wastewater careers. From FY 2023–2025, 83 direct interns were placed throughout various departments at the District.

Together, these programs give approximately 80 to 85 people each year a hands-on introduction to the work of running a public water and wastewater system. Our long-term Workforce Development Strategy has demonstrated measurable success through proven outcomes; from FY 2023–2025, 15 interns have been hired to temporary (1), limited term (6), or permanent (8) positions at the District.



Pictured: Sylvia Johnson (left) and Katherine Tate (right), Senior HR Analysts, Diversity and Inclusion Office

Sponsored internship programs extend the pipeline further across the East Bay, partnering with community-based organizations and schools to provide an introductory and technical skills layer that prepares participants to step confidently into the industry and grow from day one. From FY 2023–2025, partnerships with community based-organizations to enhance skilled trades career pathways placed 9 interns, skills development for individuals with disabilities placed 7 interns, and water and wastewater career exploration for high school students placed 88 interns.

From High School Intern to Energy and Art Steward

Charmin Roundtree-Baaqee
Operations and Maintenance Engineer
21 Years with the District

With deep roots at the District, Charmin has spent years helping shape its work and impact. She started as a high school intern placed with EBMUD engineers, rotating through different groups during the school year and over breaks—gaining early exposure to multiple disciplines and a clear line of sight from the classroom to real infrastructure projects.

That early pipeline carried her into a college level internship, a two year engineering role, and then a permanent position. Today, more than 20 years in, she focuses on energy management and renewable resources: managing solar photovoltaic installations at EBMUD facilities, using onsite generation to offset treatment and pumping costs, and helping oversee hydroelectric projects that put green power and renewable energy credits onto the grid.

Alongside that technical portfolio, Charmin leads EBMUD's public art gallery space, a role she has held for more than 15 years. She curates exhibitions with local artists and community partners, works with employee affinity groups around heritage-month shows, and helps the District provide stipends and visibility for artists whose work reflects East Bay stories. By bringing community members into EBMUD's headquarters for receptions, workshops, and exhibits, she uses art as another kind of infrastructure—one that connects technical operations to the people and neighborhoods they serve.



"I've been able to manage solar projects and hydro generation on one side and a public art gallery on the other, but for me it all comes back to the same thing: using every tool we have to serve this community better."



Our Community Workforce Partners



Civicorps is an Oakland-based job training and education organization that re-engages young adults who have stepped away from traditional career pathways. Through its Environmental Management program, Civicorps places members on paid conservation and environmental crews working directly alongside employers like EBMUD. Participants earn certifications in chainsaw operation, wildland firefighting, OSHA-10 safety, and plant identification while building a professional track record in the field.



Cypress Mandela runs a free, 16-week pre-apprenticeship program in green construction for Bay Area residents 18 and older. Participants receive hands-on instruction in subjects such as plumbing fundamentals, electrical basics, blueprint reading, and environmental health and safety, alongside life skills training. We invest time with Cypress Mandela trainees preparing them to be competitive in the EBMUD hiring process.



Rising Sun is a Bay Area nonprofit focused on youth employment and clean energy workforce development, connecting young people from low-income communities to environmental jobs and the professional skills that sustain them. Our partnership with Rising Sun extends EBMUD's reach into communities where awareness of utility careers is limited, creating early exposure that plants seeds for future applicants long before a position is ever posted.



BAYWORK is a regional consortium of Bay Area water and wastewater agencies focused on building a reliable utility workforce, and EBMUD is an active signatory partner. Through shared internships, trainings, and technical events, BAYWORK expands the talent pipeline into mission-critical jobs. **Jewish Vocational Service (JVS)** serves as a workforce intermediary, connecting employers, unions, community colleges, training providers, and job seekers. In collaboration with BAYWORK, JVS launched the **Water Utilities Career Pathways Project**. This project aims to recruit, train, and place individuals into careers in the water industry, with a special emphasis on individuals from underrepresented communities. JVS has provided case management support to several BAYWORK interns. BAYWORK also gives EBMUD employees access to additional development opportunities.



Toolworks partners with EBMUD through the Sponsored Internship program to create paid placements specifically for individuals with disabilities. The partnership reflects our commitment to creating opportunities that are inclusive in their design, ensuring that the path to a water career is accessible to everyone.

Our Education Partners



Laney College

Laney College sits at the center of our academic pipeline. We partnered with Laney to launch the Waterways Plumber Training Program in direct response to a projected gap in our plumbing workforce, a program that drew nearly 200 applicants from across Oakland for its first cohort and graduated a class of 28 students ready to compete for distribution positions.



Peralta Community College District, the broader district that houses Laney College, is a key academic partner for us across the East Bay. Peralta provides the technical coursework and industry-recognized credentials that connect community outreach to concrete opportunities. From recruiting interns and new hires to supporting the ongoing development of current staff, Peralta functions as the embedded education layer that bridges aspiration and a water career.

Charting a New Course through Laney College

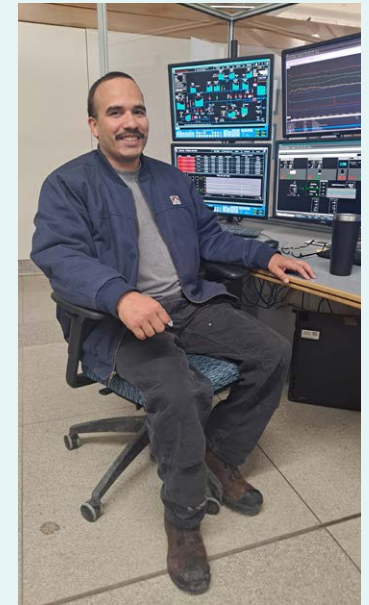
Victor Prado
Water Treatment Operator,
Sobrante Water Treatment Plant
2 Years with the District

Victor Prado spent nearly a decade teaching social science in Bay Area schools before deciding to change course. He found his footing at Laney College, where he learned about careers in the water industry and the pathway through BAYWORK.

His entry point was a maintenance internship. From there, he moved into a limited-term Special Employment Program (SEP) Trainee role with Grounds Maintenance, then advanced to Water Treatment Operator, a position that puts him at the center of EBMUD's daily mission. At the Sobrante Water Treatment Plant, he monitors treatment processes and helps ensure the safety of drinking water for hundreds of thousands of East Bay residents.

The progression was not automatic. Prado points to tuition reimbursement, career coaching, and the consistent encouragement of supervisors as the supports that made continued advancement possible. After helping lead a Spanish-language plant tour for community visitors, he described the experience plainly: *"It reinforced how important safe, reliable drinking water is to public health and community trust."*

His supervisor noted that as an intern, Prado stood out for his adaptability and work ethic across a range of tasks, from welding and torch cutting to valve installation. Those qualities, developed through the program, are what EBMUD is now counting on every day.



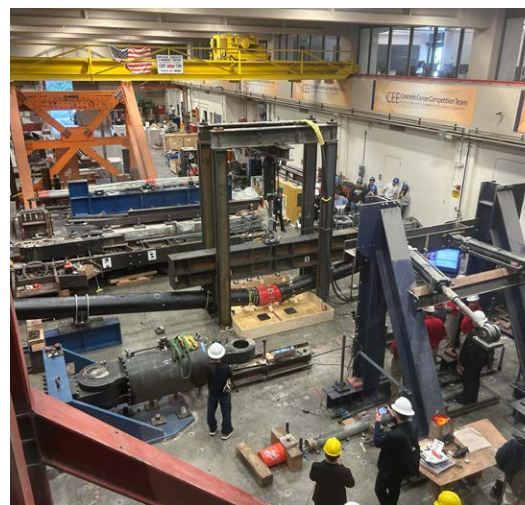
"I knew I wanted to switch careers but struggled to find something to transition toward. That brought me to study at Laney College, where I learned about the pathways and opportunities at EBMUD."

Building Tomorrow's Water Stewards: Our UC Berkeley Partnership

In 2021, EBMUD and the University of California, Berkeley launched the Center for Smart Infrastructure—a joint research and applied testing facility based at UC Berkeley's Richmond Field Station, where engineers and graduate students work directly alongside EBMUD professionals to solve real operational challenges. From earthquake-resilient pipeline design and large-scale fault-rupture testing to remote sensing, predictive modeling, and AI-driven infrastructure decision-making, the Center puts the East Bay's water system at the frontier of applied engineering research.

In 2025, we extended that commitment with a second phase of funding, bringing our total investment in the partnership to \$4.3 million and supporting 10 new research projects focused on materials performance, infrastructure resilience, and risk assessment. The work benefits not only EBMUD but water and wastewater utilities across the country. Partner agencies on Phase 2 include the Los Angeles Department of Water and Power, the San Francisco Public Utilities Commission, Alameda County Water District, Contra Costa Water District, and Metropolitan Water District of Southern California.

The partnership also has an education dimension. In Fall 2022, EBMUD and UC Berkeley launched CE112: Water and Wastewater Systems Design and Operation, an undergraduate course co-developed by Professor Kenichi Soga and our staff, with General Manager Clifford Chan among its contributors. Students study the planning, design, construction, and operation of real water and wastewater systems, with field visits to EBMUD treatment facilities, pipeline construction sites, and major dams including Pardee and Camanche. The course is grounded in current EBMUD infrastructure challenges, in the expectation that many of these students will help solve tomorrow's challenges. Whether they go on to work at EBMUD, other public utilities, or private engineering firms, they carry the principles of water stewardship into the projects they take on.



Coordinating the Work That Keeps Water Moving

Oscar Herrera
North Area Engineer
29 Years with the District

Oscar Herrera began his water career through a high school internship at EBMUD in 1996, long before he imagined a decades-long career helping keep the East Bay's drinking water system running smoothly. What began as an entry-level opportunity became a professional throughline: a chance to keep learning, step into new roles, and see the tangible results of his work in the communities where he grew up.

Today, Oscar serves as a North Area Engineer, coordinating infrastructure projects between EBMUD crews, cities, counties, and other public agencies. His work ensures construction and maintenance activities are carefully sequenced to reduce duplication, minimize disruptions for residents, and maximize the efficiency of public infrastructure investments.

Over nearly three decades, he has worked across planning, design, and construction, building both a comprehensive understanding of the water system and a career that provided real financial stability and professional leadership, including leadership roles with the Society of Hispanic Professional Engineers (SHPE) and the Bay Area Water Works Association (BAWWA).

One of his proudest accomplishments is Laguna No. 2 Pumping Plant in Orinda, a facility whose concrete foundation, masonry building, and roof framing he designed and later watched rise from the ground.



"Whenever I drive by the pumping plant in Orinda, I can look at my wife and daughter and proudly say, 'hey – your dad designed and built that building there.'"

From Classroom to Shop Floor: A Pipeline into the Trades

Diane Starr

Maintenance Machinist, Adeline Maintenance Center

5 Years with the District

Diane Starr's journey to becoming a machinist at EBMUD reflects how a coordinated workforce pipeline can open doors into skilled trades.

Her path to EBMUD ran through Laney College's Machine Technology program, a workforce-focused job fair where she first connected with District staff, and a critical assist from Jewish Vocational Service (JVS), which helped her build technical competencies, prepare for trade-specific interviews, and navigate public sector hiring. She secured an internship during the COVID-19 pandemic, a moment when most institutions were not opening doors.

From that internship, Starr advanced into EBMUD's apprenticeship program, completed rigorous written and practical examinations, and earned journeyman status. Today, at EBMUD's Adeline Maintenance Center, she diagnoses and repairs the hydraulic and pneumatic tools, pumps, and equipment that field crews depend on every day.



"The process of taking something that's broken, figuring out what's wrong, and getting it back into working order—it's incredibly satisfying."

Starr's story demonstrates something important about how the pipeline works: it is a network of partners—EBMUD, community colleges, workforce development organizations, and our own apprenticeship and mentorship programs—working in tandem.

To those earlier in the pathway, her advice is direct: *"Get good at your trade, keep building your skills, and keep applying."*



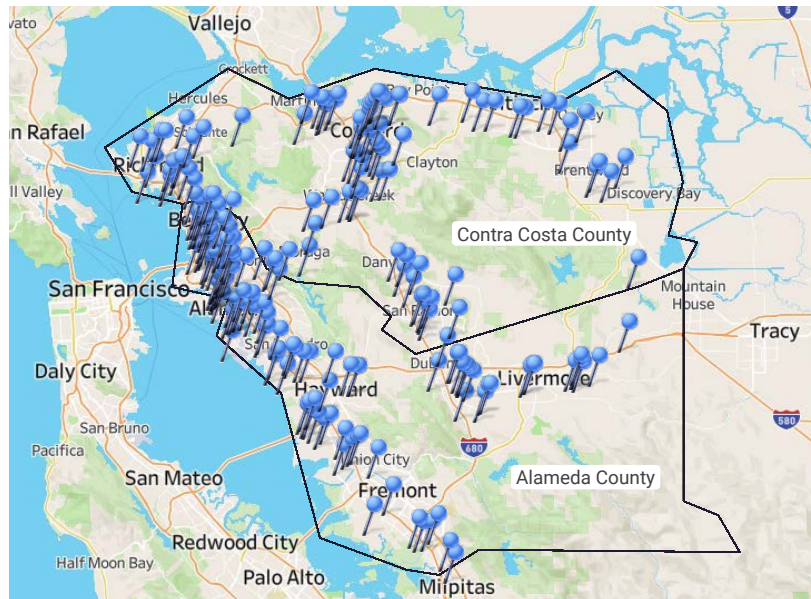
PROCUREMENT AT EBMUD

Spending That Builds the East Bay

The way we spend ratepayer dollars shapes not only the water system we depend on, but also the economic opportunities created throughout the East Bay.

Between Fiscal Years 2023 and 2025, \$792.6 million of our spending flowed to more than 1,500 suppliers. Five industries captured roughly 73% of that spend, or \$575.9 million: Construction, Professional Services, Wholesale Trade, Administrative Support Services, and Transportation & Warehousing. These five sectors help build, run, and maintain the system that delivers clean water to 1.5 million customers each day. They also represent paychecks, contracts, and small-business invoices that circulate back through the East Bay neighborhoods we serve.

83% of our spend stays inside California, and most of it circulates within Alameda and Contra Costa counties. The businesses winning this work, and the families those businesses employ, are largely the same households paying the bills that fund it.



Over FY 2023-2025, we did business with over 200 unique suppliers within the borders of Contra Costa and Alameda counties.

Where the Money Goes: Top 5 Sectors at a Glance (FY 2023-2025)¹

Sector	% of Total Spend
CONSTRUCTION	20%
PROFESSIONAL SERVICES	19%
WHOLESALE TRADE	16%
ADMINISTRATIVE SUPPORT SERVICES	11%
TRANSPORTATION & WAREHOUSING	7%
TOTAL FOR TOP 5 SECTORS	73% of total spend

¹ Procurement spending was categorized using suppliers' North American Industry Classification System (NAICS) codes, the standard used by Federal statistical agencies to classify businesses into specific industries based on the primary products and services that they offer.

Construction: The Infrastructure Engine—\$158.3 Million

Construction was our largest spend category in FY 2023-2025, and one line item dominated it. Water and sewer line work alone accounted for \$53 million, the financial fingerprint of a 10-year program to replace 300 miles of aging pipe across the East Bay. Nearly every construction dollar traces back to a project in our Capital Improvement Program, and to the field crews and small contractors whose livelihoods depend on its continuity.

Top Subcategories	Cumulative Spending
Water and sewer line construction	\$53M
Commercial and institutional building construction	\$34.7M
Highway, street, and bridge construction	\$24.4M
Concrete foundation and structure contractors	\$11.6M

Professional Services: The Knowledge Economy at Work—\$154.5 Million

Replacing miles of pipeline and modernizing a 90-year-old treatment plant requires engineers, environmental scientists, and technical specialists. Professional Services accounted for \$154.5 million over three years. Engineering services alone, at \$96.6 million or 12.2% of all procurement, was our single largest line item across every sector. Environmental consulting followed at \$22.2 million, supporting watershed stewardship, PFAS compliance, and habitat restoration across the 57,000 acres we manage.

Top Subcategories	Cumulative Spending
Engineering services	\$96.6M
Environmental consulting	\$22.2M
Computer systems design	\$6.3M
Management consulting	\$3.9M
Legal services	\$3.1M

Wholesale Trade: The Supply Chain That Keeps Water Safe—\$122.8 Million

Wholesale Trade is where daily operational reliability becomes regional economic activity. Chemicals alone, including disinfectants and other water treatment agents, account for \$53.3 million of the category's \$122.8 million over three years, a direct measure of what 100% compliance with every federal and state water quality standard costs to maintain.

Top Subcategories	Cumulative Spending
Chemical and allied products	\$53.3M
Construction and mining equipment	\$27.8M
Computer peripherals	\$10.5M
Industrial machinery	\$7.7M

Before a single pipeline gets replaced or a treatment plant gets upgraded, engineers have already spent months on the design, the permits, and the seismic analysis. That's why engineering was our largest procurement category over three years—\$96.6 million, or 12.2% of all spending.

Administrative Support Services: Security and Environmental Stewardship—\$83.3 Million

Administrative Support Services—\$83.3 million over three years—keeps EBMUD’s facilities secure, its grounds maintained, and its operations running. Security services spending makes up 54% of this sector, reflecting the scale of facility protection across EBMUD’s properties, including treatment plants, reservoirs, pumping stations, and watershed lands. The last three subcategories together represent \$23.6 million in environmental stewardship spending.

Top Subcategories	Cumulative Spending
Security services	\$45.1M
Materials recovery	\$12.7M
Landscaping services	\$6.7M
Remediation services	\$4.2M

Transportation & Warehousing: Moving Materials Locally — \$57 Million

Transportation & Warehousing is the trucking and logistics layer that moved equipment, materials, and waste across our service area, \$57.0 million over three years. More than 70% of that spending flowed through local freight trucking and freight arrangement, and the local concentration matters. Those dollars circulated within the regional economy, supporting drivers, dispatchers, and warehouse workers who live in the same East Bay communities we serve.

Top Subcategories	Cumulative Spending
Local freight trucking	\$20.9M
Freight transportation arrangement	\$19.9M
Specialized freight	\$6.1M

What This Spending Builds

\$575.9 million spent on five major industry sectors translates into thousands of paychecks, hundreds of small businesses, and a procurement footprint that reaches every community we serve. That spending is tied to our mission, concentrated in the region we serve, and weighted toward the kinds of jobs that help East Bay families build stable lives: skilled trades, technical professions, logistics, and operational services.

Who Benefits: The Contract Equity Program

A 40-Year Commitment to Open Doors and Build Local Roots

We adopted our first supplier diversity policy in 1984, one of the earliest among Northern California public utilities. It was formalized in 1998 as Policy 6.08, which established our Contract Equity Program (CEP). It was later expanded in 2015 to fold Disabled Veteran Business Enterprises into our Small Business definition, and again in 2019 to incorporate local-hire commitments for workers on job sites, extending equity goals beyond the firms awarded the work. Today, the program supports the participation of small, local, minority-owned, women-owned, LGBTQIA+-owned, and disabled-veteran-owned businesses in our contracting. It operates through outreach, technical assistance, Business Development Forums, and contracting objectives, along with set-asides and bid discounts for firms that qualify as small businesses—embedded in our governance architecture rather than left to discretion.

For the small paving contractor in Oakland, the environmental consulting firm in Richmond, and the equipment supplier in Hayward, that permanence is what makes the program useful. It means a business plan can be built around a procurement relationship that has been consistently available for four decades.

Three-Year Results, FY 2023-2025

Over three fiscal years, \$424.8 million—54 cents of every procurement dollar—went to local businesses in Alameda and Contra Costa counties, EBMUD’s service area. Another \$50.9 million went to businesses in San Joaquin, Calaveras, Amador, and Sacramento counties, which are home to EBMUD’s water source and main delivery system. An additional \$178 million was spent elsewhere within the state of California.



Your rate dollar at work

More than half of our procurement spend lands with businesses in the same two counties whose ratepayers fund this work. The same households drinking the water are, in many cases, the households cashing the paychecks.

Small businesses captured nearly a third of all spending at \$244.4 million. These are the firms that create the most jobs per dollar and root economic activity most deeply in the communities where they operate. Ethnic minority-owned firms received \$88.2 million, and white women-owned firms received \$18.2 million.

Of the 1500+ active suppliers in our vendor pool, over 700 of them are small businesses, and over 200 are classified as ethnic minority- or women-owned.

Category	3-Year Spend
Local Businesses	\$424.8M
Small Businesses	\$244.4M
Ethnic Minority-Owned	\$88.2M
White Women-Owned	\$18.2M

Local Hire: Keeping Wages in the Community

Supplier diversity tells part of the story. Local hire tells the rest: who is actually doing the work, and where their paychecks go.

In Fiscal Year 2024, we hit a 54% local hire rate across 27 targeted construction projects, above our 50% good-faith goal. Those local hires generated more than \$15.6 million in wages and benefits flowing to workers in Alameda, Contra Costa, San Joaquin, Calaveras, Amador, and Sacramento counties. In the same year, 84% of contracts were awarded to companies whose workforce is at least 50% drawn from the local Metropolitan Statistical Area.

We adopted the local hire component of the Contract Equity Program in 2019 to address a gap the rest of the program could not close on its own. A contract awarded to a local firm keeps the business in the region. A local hire requirement keeps the paycheck there too.

54%

**local hire rate in FY 2024,
generating more than \$15.6M
in wages and benefits**

A Profile in Stewardship

Beverly Johnson
Contract Equity Administrator
– 39 Years with the District –

Most institutions talk about access. Beverly Johnson has spent 39 years building it.

She joined EBMUD in 1987, the year before our supplier diversity policy was expanded to include minority and women-owned businesses. The Contract Equity Program, as it exists today under the Office of Diversity, Equity, and Culture—the outreach, the technical assistance, the Business Development Forums, the local hire requirement—was shaped, contract by contract, by people like Beverly who treated each opening as a door worth holding.

Her path to the work mirrors the work itself. Before EBMUD, she helped contractors prepare bids and estimates for small and diverse firms trying to break into public contracting. A mentor at an EBMUD outreach event encouraged her to apply for a position with the District. She listened. Thirty-nine years later, she is the person other people meet at the same kind of event, and the doors she opens for them are the doors that were once opened for her.

Her conviction is plain: when businesses get real access to real contracts, neighborhoods get stronger. Day to day, that conviction looks like helping a firm decode a bid requirement, walking a small contractor through bonding and insurance paperwork, or connecting a Richmond consultant with the right plan room before a deadline. For many of the businesses Beverly has worked with, an EBMUD contract is more than revenue. It is the credential that makes the next contract possible, and the one after that.



“Thirty-nine years in, what I’ve learned is that the program works one relationship at a time. Every contract is somebody’s chance, and somebody else’s first call when the next opportunity comes.”

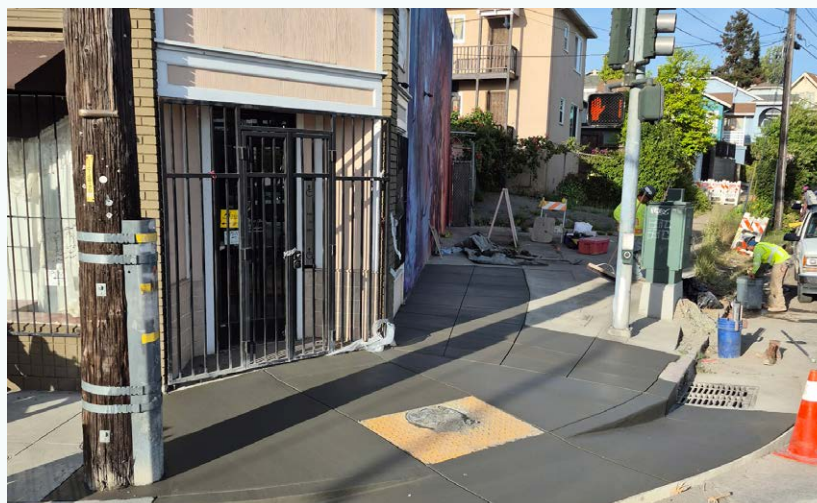
From Residential Jobs to Rebuilding City Streets

Solid Ground Masonry and Concrete

📍 Oakland

For Ashley and Henry Vargas, Solid Ground Masonry and Concrete was never just a business—it's about creating stability for their family, their team, and their community. Henry brings more than 15 years of construction and stonework experience, including a four-year stonemason apprenticeship. Ashley came from 12 years in medical research, and she now applies those program management skills to running the business full-time alongside Henry and their daughter.

Since beginning work with EBMUD in 2023, their scope of work and ambitions have grown alongside the relationship. A small, family-run business, Solid Ground specializes in concrete work that supports critical infrastructure—restoring sidewalks, curbs, and streets after underground utility work is completed. Their introduction to EBMUD came through a professional connection in the field, and what followed was a structured pathway into public contracting that opened doors residential work never could. For the team, the experience has been a turning point. Compared to the unpredictability of residential work, partnering with EBMUD has provided consistency, clear communication, and reliable payment, creating the kind of stability that allows small contractors to invest in their crews and plan for the future.



"To be able to say, 'I am putting sidewalks down in the city of Oakland'...that really has our team walking with their heads held high and feeling pretty good about the work that they do."

**– Ashley Vargas,
Co-Owner,
Solid Ground
Masonry and
Concrete**

Growing a Technical Firm on Trust and Local Talent

Alisto Engineering Group

📍 Walnut Creek

Al Sevilla founded Alisto Engineering Group in 1992 as a minority-owned engineering firm built on a simple premise: that clients deserve a partner they can trust completely. That philosophy brought him to an EBMUD Contract Equity Program Outreach Event in 1993. With the CEP team's guidance through vendor registration, the firm landed its first contract in 1996—a general environmental services agreement that opened the door to nearly three decades of work together.

Nearly 30 years later, Alisto has grown to more than 180 professionals, scientists and technicians, and completed regulatory compliance projects, corrosion protection installations across thousands of copper laterals in Alameda and Richmond, and a customer-side lateral inventory that helps EBMUD identify and replace aging lead service lines. That track record earned a direct referral to another local utilities commission, allowing the business to expand its footprint in the region.

Every project also means local hiring. The specialized field work Alisto performs isn't taught in schools, so the firm trains workers from the communities where work happens, including populations that would otherwise have few pathways into technical employment. Alisto has extended that same local hiring commitment to the other regional offices they operate in Southern California, New York, and Texas, creating more than 50 new jobs to date.



"It's not just how good you are technically, but how you deliver, how you perform. At the end of the day, it's really a matter of trust—giving your clients confidence and peace of mind that the job is being done well."

— Al Sevilla, Founder and Principal,
Alisto Engineering Group

Creating a Safer Community, at EBMUD and Beyond

ICE Safety Solutions

📍 *Fremont*

Pam Isom started ICE Safety Solutions—“In Case of Emergency”—with a single mission: make sure people don’t die. That mission was born at 16, when her father survived cardiac arrest because Pam and her twin brother knew CPR. Twenty-seven years later, that purpose drives a full-service safety training, simulation, consulting, and equipment company that has become indispensable to water utilities across California.

What began as a single contract for CPR and first aid training through EBMUD has since expanded into a wide range of services, from forklift certification and fire extinguisher training to emergency response team preparation and specialized programs like dog safety for field crews.

That growth has extended far beyond EBMUD. With the District serving as a trusted reference and proving ground, ICE Safety Solutions has expanded to support more than a dozen additional water utility clients. That credibility, Pam notes, is the ticket for entry across the industry.

But the impact goes deeper than business expansion. As the company grew, so did its workforce—tripling in size over the course of the partnership, creating jobs, increasing wages, and opening pathways to long-term stability for employees. For Pam, that ripple effect—from a single utility contract to dozens of careers, a dozen utility clients, and a community made measurably safer—is exactly what a partnership is supposed to do.



“EBMUD has really created an ecosystem of safety, jobs, and opportunity. Their impact is not just for the year we’re in. It’s going to be felt for generations.”

— Pam Isom,
President and CEO, ICE Safety Solutions



Community Partner Voices

Construction Resource Center

📍 *Serving Alameda, Contra Costa, San Francisco, and Santa Clara Counties*

For 15 years, the Construction Resource Center (CRC) has worked alongside EBMUD to connect local and diverse contractors with real contracting opportunities—coordinating outreach events, facilitating matchmaking sessions between small firms and prime contractors, and partnering on graduation ceremonies for CRC’s annual 10-week project management course. EBMUD serves as an active board member of CRC, contributing industry feedback that shapes the curriculum small businesses use to compete for public contracts across the Bay Area.

“Our partnership with EBMUD plays a crucial role in connecting with local and diverse businesses—fostering opportunities for underrepresented groups and creating the networking and contracting possibilities that strengthen their capacity.”

— Construction Resource Center



American Indian Chamber of Commerce of California

The American Indian Chamber of Commerce of California works to create networking, advocacy, and business development opportunities for tribes, tribal enterprises, Alaska Native Corporations, and American Indian and Alaska Native businesspeople. In the East Bay, that work has included training workshops and advocacy aimed at increasing the inclusion of Native American businesses in regional supply chains. EBMUD’s partnership with the Chamber has centered on outreach, relationship-building, and practical business development support. Beverly Johnson has participated in Chamber events and serves on its Corporate Advisory Council, helping connect Native-owned businesses and tribal enterprises to the technical guidance and contracting information needed to pursue opportunities with the District.

“With EBMUD’s participation, doors were opened for opportunities. Business development technical expertise was shared to help guide our members and tribes in conducting business with EBMUD.”

— American Indian Chamber of Commerce of California



Our Strategic Commitment

The specialized, large-scale nature of heavy civil construction, treatment plant engineering, and pipeline work that dominates a water utility's capital budget means that as contract size increases, the pool of qualified firms narrows. Small and diverse firms often face bonding capacity, workforce scale, and specialization barriers that limit their ability to compete for the largest projects, even when they are active elsewhere in our procurement ecosystem. Broadening access at the upper tiers of the capital program remains an active priority.

Certain ownership categories—including veteran-owned, women-owned, and some ethnic minority groups—remain underrepresented relative to their presence in the East Bay business community. We view these gaps as areas of focused attention, where targeted outreach and capacity-building can expand the pipeline of qualified, competitive firms.

In 2025, we commissioned an external evaluation of the Contract Equity Program to identify barriers, assess participation patterns, and recommend structural improvements. We are using the findings from this review to strengthen how the program is designed and managed. We are also strengthening and building on existing initiatives:

- **Targeted Outreach.** We host Business Development Forums, attend regional procurement events, and maintain an open-door process for firms new to public-utility contracting. The aim is to ensure that the firms most likely to be excluded from large public contracts know about our work and know how to compete for it.
- **Technical Assistance.** Smaller firms often lose contracts not on price but on bonding, insurance, or proposal complexity. We provide pre-bid guidance, plan-room access, and one-on-one support so capable firms are not screened out by the paperwork.
- **Staff Awareness and Training.** Through our internal education such as Managers and Supervisors Training program, we are committed to increasing staff awareness of contract equity and providing the information and tools employees need to support small, local, and diverse firms through the procurement process.

“EBMUD has a significant opportunity to foster long-term growth for small, local, minority-, and women-owned businesses across the East Bay. Many of these firms have the potential to become major players in the region over the next several years if provided with meaningful opportunities and structured support. Through intentional contracting strategies, EBMUD can help build the next generation of strong, local businesses that create jobs, reinvest in communities, and strengthen the regional economy.”

—National Association of Minority Contractors (Northern CA Chapter)



PROTECTING THE ENVIRONMENT

Stewardship from Source to Bay

Our mission has always included caring for the environment, alongside delivering reliable water and wastewater service. Every day, our crews, operators, scientists, and planners help manage the natural resources that make life in the East Bay possible. That work is part of building a resilient water system that can serve the region for the next century.

Environmental stewardship runs through the full length of the water cycle. It starts in the Mokelumne River watershed, about ninety miles east, where land management and river health shape the quality of the water that eventually reaches the East Bay. It continues through the conservation programs that reduce demand and stretch existing supplies, and through the wastewater treatment and pollution prevention programs that return treated water to San Francisco Bay. It also includes the renewable energy, recycled water, and greenhouse gas reduction efforts that are changing how we operate in a warming world, so that the communities we serve can count on a healthy and dependable system.

Drinking Water: Protecting the Source

About 90% of the water we deliver comes from the Mokelumne River watershed, a largely undeveloped area in the Sierra Nevada with little human activity and no agricultural or industrial runoff. Because the source is clean, our treatment plants can focus on completing treatment rather than correcting severe upstream contamination.

We manage 57,000 acres of protected watershed land and spend about \$2.5 million each year on prescribed burns, shaded fuel breaks, weed abatement, erosion monitoring, and grazing programs that reduce wildfire risk above our reservoirs and facilities. A major wildfire in this area would damage habitat and send ash and sediment into the reservoirs, which would affect both water quality and treatment costs. The ongoing investment in fuels management helps lower that risk.

Conditions in the Mokelumne River provide one of the clearest indicators of whether this work is effective. In the 2024–25 fall run, more than 35,000 Chinook salmon returned to the river, including a single-day count of 3,824 fish, which was the highest in more than three decades. In 2025, a drier year with fewer high-flow events, more than 10,500 salmon still returned. Those returns supported the collection and fertilization of 7.5 million salmon eggs at the Mokelumne River Fish Hatchery, in partnership with the California Department of Fish and Wildlife. These outcomes reflect longterm efforts in spawning gravel placement, riparian restoration, and hatchery operations that have made the Mokelumne one of the more productive salmon rivers in California.



This year marks 75 years of wastewater service, a milestone that traces back to 1951, when East Bay voters created Special District No. 1 and EBMUD opened the Main Wastewater Treatment Plant. Before that, much of the region's sewage flowed untreated into San Francisco Bay, degrading water quality and harming aquatic habitat. Over the past 75 years, sustained investment has reversed that trend, reducing pollution, safeguarding the Bay, and building the infrastructure that hundreds of thousands of residents and businesses depend on. Today, EBMUD is building on that legacy with the largest capital improvement program in the wastewater system's history, so we can continue to serve our communities and protect the Bay for future generations.



Wastewater: Protecting San Francisco Bay

Water that moves through the East Bay's pipes eventually returns to San Francisco Bay. Since the Main Wastewater Treatment Plant began operating in 1951, our role has included protecting the Bay from the pollutants that would otherwise reach it. Over time, we have added a pollution prevention program that works with more than 20,000 commercial and industrial customers to reduce pollutants at the source.

Since 1977, the combination of treatment upgrades and source control has reduced heavy metals in our Bay discharge by about 98%. Work now underway at the Main Wastewater Treatment Plant is focused on upgrading treatment processes and reducing levels of nutrients such as nitrogen. This supports broader regional goals for Bay water quality and ecosystem health.

Additionally, biogas produced during wastewater treatment is captured and used to generate electricity on site. The system produces more than 55,000 megawatt-hours of power per year, enough to meet the plant's needs and send excess electricity to the grid. That generation reduces emissions by an amount similar to removing about 22,000 cars from the road each year and saves roughly \$3 million in annual energy costs.

Climate resilience and a sustainable water future

Drought, changing snowpack, extreme storms, and rising energy prices are shaping how we plan and operate. These conditions affect how much water is available, when it arrives, and how much it costs to move and treat. Our response focuses on three areas: how we use and generate energy, how we diversify supplies, and how we cut emissions so the system stays reliable and affordable over the long term.

In 2023, we set a goal of reaching carbon neutrality for both water and wastewater operations by 2030. Since 2000, we have reduced greenhouse gas emissions from water operations by about 67% through a combination of hydropower from Pardee and Camanche dams, the 5 megawatt Duffel Solar Project, and efficiency projects at plants and pump stations. A fleet electrification program, including our participation in the Drive to Zero initiative, is reducing emissions from vehicles and equipment.

On the supply side, recycled water plays a growing role. We currently provide more than 9 million gallons per day of recycled water for industrial cooling, irrigation, and other nonpotable uses. Our longterm target is to increase that volume to about 20 million gallons per day by 2050. Each gallon of recycled water delivered to a customer for nonpotable use reduces demand on the potable system and leaves more water available in reservoirs and rivers for future years and for environmental needs.



Conservation: making every gallon count

Conservation has been a consistent part of our approach for several decades. Since 1995, customer conservation programs have produced an estimated 28 million gallons per day in lasting demand reduction. During California's most recent multiyear drought, customers reduced use by the equivalent of about 10 billion gallons, contributing to the improvement in storage conditions that allowed us to move out of drought status in April 2023. That shared effort helped protect supplies for households, businesses, and the environment during one of the most challenging periods in recent memory.

Our WaterSmart program is designed to make conservation accessible. It offers residential lawn conversion rebates up to \$2,000, commercial property rebates up to \$15,000, and on-bill financing that reduces the barrier of upfront costs for efficiency upgrades. The My Water Report Program provides account-level information on usage trends and potential leaks, helping customers identify and address problems early. In 2024, these efforts were recognized when EBMUD received the EPA WaterSense Partner of the Year award and the Alliance for Water Efficiency's Water Supplier Member of the Year recognition.



Education: Investing in the next generation

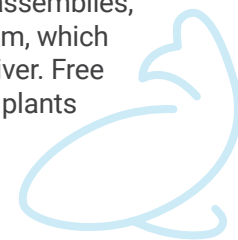
Connecting the next generation to water and environmental work is part of keeping these efforts going. We support school programs, internships, and public education activities that show how water and wastewater systems operate and why stewardship of rivers, watersheds, and the Bay matters to everyday life in the East Bay.

EBMUD reaches thousands of TK–12 students each year through a range of in-classroom and field-based experiences. Staff bring water and watershed science directly into classrooms through school assemblies, teacher workshops, and the Salmon in the Classroom program, which lets students raise salmon for release into the Mokelumne River. Free field trips take 5th graders to reservoirs and water treatment plants for hands-on science activities, while high school students can tour the Main Wastewater Treatment Plant. EBMUD also offers lesson plans and teaching materials in English and Spanish for every grade level, and trains teachers at its facilities to support science curricula. For broader community learning, the Water Wednesdays speaker series, staff-led Water Walks, and the Community Water Academy extend water education to residents and regional leaders.

The Diversity and Inclusion Office also leads an annual High School Summer Internship (HSSI) program providing East Bay and Mokelumne area students in grades 10-12 with hands-on career exposure in water and wastewater fields through departmental placements, weekly enrichment sessions, and career exploration opportunities. HSSI Interns build valuable academic and professional skills while receiving mentorship and support from EBMUD staff.



Pictured: 2025 HSSI interns leading a main break simulation at Adeline Maintenance Center.





LOOKING AHEAD – OUR ECONOMIC FUTURE

Stewardship and the value of your rate dollars

The environmental work described in this report is part of how we use and protect the rate dollars our customers invest. Clean source water reduces treatment costs and supports reliable supply. A healthier Bay reflects effective wastewater management and strong regional partnerships. Investments in climate resilience, recycled water, and conservation help keep the system stable as conditions change. Together, these efforts strengthen public health, support a healthy and dynamic East Bay, and help keep long-term costs more predictable for the customers who fund this work.

A rising tide

Our economic impact is growing. Our total regional output rose from about \$1.53 billion in FY 2023 to roughly \$1.65 billion in FY 2025, accompanied by increases in the number of jobs and total labor income supported across the region.

As we invest in the 10-year, \$6.8 billion Capital Improvement Program, those returns will grow, and continue to support more local jobs, businesses, and long-term investments that strengthen the regional economy.

The work ahead requires a sustained pipeline of engineers, operators, tradespeople, and environmental scientists, and we are building it deliberately through high school internships, apprenticeship programs, and structured career pathways designed to build long-term careers in the public water sector.

Beyond the numbers

The annual economic output measures transactions: jobs, spending, wages, and the businesses they support, but it does not capture everything. It does not assign a dollar value to 100% water quality compliance. It does not measure the ecosystem value of 57,000 acres of protected watershed land, the avoided cost of a pipe failure that never happened because it was replaced preventively, or the recreation value of more than 90 miles of trails and four reservoir recreation areas open to the public. Those benefits are real, and they mean the value we deliver to this community is larger than an economic output figure suggests.

Over the decade ahead, our goal is to keep turning rate dollars into lasting infrastructure, good jobs, and environmental stewardship for the next generation of East Bay residents.





Methodology, Assumptions, and Limitations

Methodology

This report measures the total economic contribution of East Bay Municipal Utility District to the regional economy for fiscal years 2023, 2024, and 2025. The analysis was conducted by Laisar Management Group using **IMPLAN** (Impact Analysis for Planning), an input-output modeling system widely used by government agencies, academic institutions, and private sector organizations to quantify economic impacts.

The analysis uses the 2024 IMPLAN regional model for Alameda and Contra Costa counties, which aligns with EBMUD's service territory. All fiscal-year expenditures are converted to constant 2026 dollars using IMPLAN's built-in deflators, so year-over-year growth trends reflect real economic expansion rather than price increases. Input data are derived from EBMUD's audited Annual Comprehensive Financial Reports (ACFRs) for FY 2023–2025 and supplemental employment and spending data provided by the District.

Input-Output Modeling

Input-output (I-O) modeling is a standard economic method for estimating how an initial expenditure moves through a regional economy. When EBMUD pays an employee, a contractor, or a supplier, those dollars are then spent again by workers and businesses on goods and services such as housing, groceries, transportation, and healthcare. I-O modeling measures these ripple effects by tracing how spending circulates among industries and households within a defined region.

IMPLAN builds its regional models from federal sources including Bureau of Economic Analysis input-output accounts, Bureau of Labor Statistics employment data, and U.S. Census Bureau industry statistics. Those data are combined to estimate the local spending relationships used in this analysis for Alameda and Contra Costa counties.

Assumptions

- **Regional boundary.** All estimates are constrained to Alameda and Contra Costa counties. Spending flowing outside this area is not counted as regional output.
- **IMPLAN multipliers.** Regional multipliers reflect average industry relationships within the study geography and may not capture firm- or project-specific variation in local purchasing behavior.
- **Capital project timing.** Expenditures are attributed to the fiscal year incurred, not to a project's full construction period, which may produce variation in annual estimates for multi-year projects.
- **Linearity of analysis.** IMPLAN uses an inherently linear modeling framework, such that the inputs consumed vary in direct proportion to output and there are no economies of scale. The model assumes that doubling EBMUD's spending exactly doubles the economic impact, with no price responses, capacity constraints, input substitution, or behavioral changes in the supply chain. For the expenditure levels analyzed in this study, this approximation is reasonable, but readers should note that the model does not account for potential labor market tightening or construction cost inflation that could affect the real-world translation of spending into economic activity.

Limitations

- IMPLAN is based on historical industry data, and the model estimates averages rather than observed transactions. Actual multiplier effects for specific projects or spending categories may differ from modeled estimates.
- EBMUD is a tax-exempt public utility. The tax revenues reported here represent taxes generated by the economic activity EBMUD supports (income and payroll taxes on workers, sales taxes on local spending) not taxes paid by the District.
- Induced effects carry the greatest modeling uncertainty, as they depend on assumptions about household spending patterns that are not directly observable.
- The model does not assign dollar values to environmental benefits, public health outcomes, or the avoided costs of infrastructure failures, all of which represent additional community value beyond the figures reported here.



EBMUD contracted a local woman-owned business to paint this mural at Highland Community School in East Oakland.



East Bay
Municipal Utility District

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