

Strategic Plan

Key Performance Indicators

Fiscal Years 2023 & 2024

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Downtown Oakland

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Overview

The purpose of the strategic planning process is to define the actions that need to be taken in the next three to five years to achieve the District’s mission now and well into the future. The Strategic Plan incorporates the District’s mission and principles, and identifies its goals, strategies, objectives and key performance indicators. The Plan guides staff in setting priorities and allocating resources.

- Our **Mission** is to manage the natural resources with which the District is entrusted; to provide reliable, high quality water and wastewater services at fair and reasonable rates for the people of the East Bay; and to preserve and protect the environment for future generations.
- Our **Principles** provide the foundation of the Strategic Plan and form the basis of our business practices.
- Our **Goals** define in broad terms the high-level achievements the District will pursue; they explain ‘what’ not ‘how’, and tell where we are going rather than how we will get there.
- Our **Strategies** define the actions that are necessary to achieve each goal, and may take several years to implement.
- Our **Objectives** reflect what we need to accomplish in the near term.
- Our **Key Performance Indicators** (KPIs) measure how well we are doing in achieving our goals.



Pardee Reservoir



Recycled Water

This Key Performance Indicators publication focuses solely on the KPIs for Fiscal Years 2023 and 2024. Please see the Strategic Plan document for further details on the Plan including goals, strategies and objectives.

Key Performance Indicators

Key Performance Indicators (KPIs) measure the progress we are making in achieving the Strategic Plan goals. An effective KPI serves as an important measure of progress. KPIs can track efficiency, effectiveness, quality, timeliness, compliance, behaviors, economics, project performance, personnel performance or resource utilization. The KPIs and targets are evaluated and revised as part of the Strategic Plan update process. Performance is reported annually to the Board of Directors. The current set of KPIs is part of the Strategic Plan adopted by the Board of Directors in June 2020.

The following page details all six goals and associated strategies on a single page.



Main Wastewater Treatment Plant

Strategic Plan | Goals and Strategies

East Bay Municipal Utility District | July 2020

Long-Term Water Supply

Goal: We ensure a reliable high quality water supply for the future.

- Strategy 1** Preserve current water rights and entitlements and augment the District's successful water supply projects by obtaining supplemental supplies to meet customer demands.
- Strategy 2** Reduce potable water demand through water efficiency and conservation and build on past water savings success to help ensure a reliable water supply.
- Strategy 3** Reduce potable water demand through water recycling and build on past success to achieve a diversified and reliable water supply.
- Strategy 4** Consider the impacts of climate change and take appropriate action to understand and balance mitigation and adaptation responses to those impacts through sustainable activities.

Water Quality and Environmental Protection

Goal: We meet or surpass environmental and public health standards and protect public trust values.

- Strategy 1** Manage the Mokelumne and East Bay watersheds to ensure a high quality water supply and protect natural resources while providing appropriate public access.
- Strategy 2** Operate and maintain District facilities to surpass federal and state drinking water regulations.
- Strategy 3** Operate and maintain District facilities to anticipate and meet all water discharge, air emission, and land disposal requirements to protect and enhance the environment.
- Strategy 4** Minimize impacts to the environment by reducing, recycling, reusing and reclaiming waste, and by conserving natural resources.
- Strategy 5** Ensure protection and stewardship of San Francisco Bay.
- Strategy 6** Operate Pardee and Camanche Reservoirs and facilities as an integrated system to achieve multiple objectives including municipal water supply, stream flow regulation, environmental protection, flood control, hydropower, and releases for downstream requirements.

Long-Term Infrastructure Investment

Goal: We maintain and improve the District's infrastructure in a cost-effective manner to ensure sustainable delivery of reliable, high quality service now and in the future, addressing economic, environmental, and social concerns.

- Strategy 1** Maintain coordinated master plans for all facilities and assets.
- Strategy 2** Meet operational needs and reliability goals by effectively maintaining the infrastructure.
- Strategy 3** Implement the master plans and set priorities in the operating and capital budget process to reflect the needs identified in those plans.

Long-Term Financial Stability

Goal: We manage the District's finances to meet funding needs and maintain fair and reasonable water and wastewater rates.

- Strategy 1** Maintain a long-range financing plan that sets forth the long-term funding needs of the District.
- Strategy 2** Implement water and wastewater rates and charges that are legal, fair, reasonable, and equitable.
- Strategy 3** Ensure integrity, accountability and transparency in financial management.
- Strategy 4** Implement technologies that improve the efficiency and effectiveness of business processes.

Customer and Community Services

Goal: We build stakeholder trust and long-term relationships through service excellence, proactive communication and education.

- Strategy 1** Build public awareness of the District's priorities, initiatives, systems and services.
- Strategy 2** Continue to build trust by providing quality service, timely information, and resolution of customer and community inquiries.
- Strategy 3** Build long-term partnerships in the community, regionally and nationally, in areas of shared interest and in support of the District's mission.
- Strategy 4** Maintain active Emergency Preparedness and business continuity Programs to plan for, minimize interruptions, and manage the District's essential functions during an emergency and allow for an efficient and effective recovery.

Workforce Planning and Development

Goal: We create an environment that attracts, retains and engages a high performing diverse and inclusive workforce in support of the District's mission and core values.

- Strategy 1** Coordinate workforce planning activities to determine future needs, identify gaps and implement actions to close the gaps.
- Strategy 2** Continue to develop employees to meet evolving workforce demands and implement actions to close gaps.
- Strategy 3** Support District values, recognize employee contributions, and establish clear performance measures to achieve a high performance culture.
- Strategy 4** Enhance the District's ability to recruit a highly qualified, diverse staff that exhibits the District's values.

For the complete Strategic Plan, go to
www.ebmud.com/about-us/who-we-are



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Long-Term Water Supply

Goal: We ensure a reliable high quality water supply for the future.

- Strategy 1:** Preserve current water rights and entitlements and augment the District's successful water supply projects by obtaining supplemental supplies to meet customer demands.
- Strategy 2:** Reduce potable water demand through water efficiency and conservation and build on past water savings success to help ensure a reliable water supply.
- Strategy 3:** Reduce potable water demand through water recycling and build on past success to achieve a diversified and reliable water supply.
- Strategy 4:** Consider the impacts of climate change and take appropriate action to understand and balance mitigation and adaptation responses to those impacts through sustainable activities.



The Freeport Regional Water Project is a supplemental water supply source during dry years.

Long-Term Water Supply

Key Performance Indicator	FY23 Target	FY24 Target
Strategy 1: Supplemental Supply		
Additional supply by 2040 to provide 85 percent reliability under design drought conditions and diversify through regional partnerships	Negotiate a Warren Act contract with the Bureau of Reclamation for a long-term water transfer with Placer County Water Agency	Work with Placer County Water Agency to complete environmental document for a long-term water transfer
	Work with Placer County Water Agency to publish a draft environmental document for a long-term water transfer	
	If needed, complete short-term water transfers to supplement water supplies	If needed, complete short-term water transfers to supplement water supplies
	Operate the DREAM Pilot Project in San Joaquin County and compile lessons learned	Operate the DREAM Pilot Project in San Joaquin County and compile lessons learned
	Continue working with Bay Area Regional Reliability (BARR) partners to develop the Shared Water Access Program (SWAP)	Complete the BARR SWAP study and pilot test
	Negotiate key agreements necessary to determine degree of participation in the Los Vaqueros Expansion	Determine level of participation in Los Vaqueros, assist JPA with securing grant funding, initiate water rights permits, and complete negotiation of all required agreements
	Continue implementation of the Groundwater Sustainability plan for East Bay Plain	Continue implementation of the Groundwater Sustainability plan for East Bay Plain
Strategy 2: Water Conservation		
70 MGD savings from conservation programs / natural replacement by 2050 (baseline yr. 1995)	Implement Water Conservation Strategic Plan measures that are expected to result in 50 MGD of savings	Implement Water Conservation Strategic Plan measures that are expected to result in 50.8 MGD of savings
	Meet state long-term framework target by achieving established residential indoor per capita water use	55 gpcd

Long-Term Water Supply (continued)

Key Performance Indicator	FY23 Target	FY24 Target
Strategy 2: Water Conservation (continued)		
	Implement Water Conservation Strategic Plan	Implement Water Conservation Strategic Plan
Strategy 3: Water Recycling		
20 MGD of recycled water capability by 2040	Implement strategies from the DERWA Side Agreement for demand management	Continue to implement strategies in the DERWA Side Agreement
	Complete hydraulic analysis and preliminary design of the future Emeryville to Albany pipeline, and begin environmental documentation	Complete environmental documentation of the future Emeryville to Albany pipeline and begin final design
	Complete the East Bayshore water quality improvement pilot project	Begin implementing recommendations from the East Bayshore water quality improvement pilot project
Strategy 4: Climate Change		
Update the Climate Change Monitoring and Response Plan. Explore approaches for how to adapt to potential future conditions and identify "no regrets" infrastructure investment decisions	Update the Climate Change Monitoring & Response Plan to account for new information	Develop planning and design standards that incorporate climate change adaptation and mitigation principles
	Complete annual greenhouse gas emission inventory	Complete annual greenhouse gas emission inventory
Continue District leadership in climate change by participating in climate change studies, workshops, or education events	3	3

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Water Quality and Environmental Protection

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- Strategy 1:** Manage the Mokelumne and East Bay watersheds to ensure a high quality water supply and protect natural resources while providing appropriate public access.
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- Strategy 3:** Operate and maintain District facilities to anticipate and meet all water discharge, air emission, and land disposal requirements to protect and enhance the environment.
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- Strategy 5:** Ensure protection and stewardship of San Francisco Bay.
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Water travels from the Mokelumne River Watershed into Pardee Reservoir.

Water Quality and Environmental Protection

Key Performance Indicator	FY23 Target	FY24 Target
Strategy 1: Watershed Protection and Management		
Mokelumne River fall-run Chinook salmon returns (long-term average)	4,734	4,734
Strategy 2: Drinking Water Regulations Compliance		
Percent of water quality regulations met	100 percent	100 percent
Percent of water quality goals met	100 percent	100 percent
Strategy 3: Environmental Regulations Compliance		
Number of NPDES and Waste Discharge Permit Notices of violation received	0	0
Strategy 4: Reduce, Recycle, Reuse, Reclaim		
Water System: Eliminate GHG emissions for indirect and direct emissions by 2030 Wastewater System: Eliminate GHG emissions for indirect emissions and reduce direct GHG emissions by 50 percent compared to 2000 levels by 2040	31,141 MT CO ₂ e	28,348 MT CO ₂ e
Capture biogas sufficient to produce on-site energy to meet electric power demands of the Main Wastewater Treatment Plant and evaluate the best uses of excess biogas	100 percent of plant power demand	100 percent of plant power demand
Pursue large-scale photovoltaic project at the Duffel property located in Orinda	Complete permitting and design	Begin construction
Strategy 5: San Francisco Bay Protection		
Implement Private Sewer Lateral Program to reduce wet weather flows and achieve a high compliance rate at point of sales	90 percent compliance with program requirements following a title transfer	90 percent compliance with program requirements following a title transfer
Strategy 6: Operate Pardee and Camanche Reservoirs and Facilities		
Meet JSA Mokelumne River minimum flow releases 100 percent of the time	100 percent	100 percent
Review operations with lower Mokelumne stakeholders every two years	Conduct stakeholder meeting	N/A

Long-Term Infrastructure Investment

Goal: We maintain and improve the District's infrastructure in a cost-effective manner to ensure sustainable delivery of reliable, high quality service now and in the future, addressing economic, environmental, and social concerns.

Strategy 1: Maintain coordinated master plans for all facilities and assets.

Strategy 2: Meet operational needs and reliability goals by effectively maintaining the infrastructure.

Strategy 3: Implement the master plans and set priorities in the operating and capital budget process to reflect the needs identified in those plans.



EBMUD work crew installing pipeline in the community.

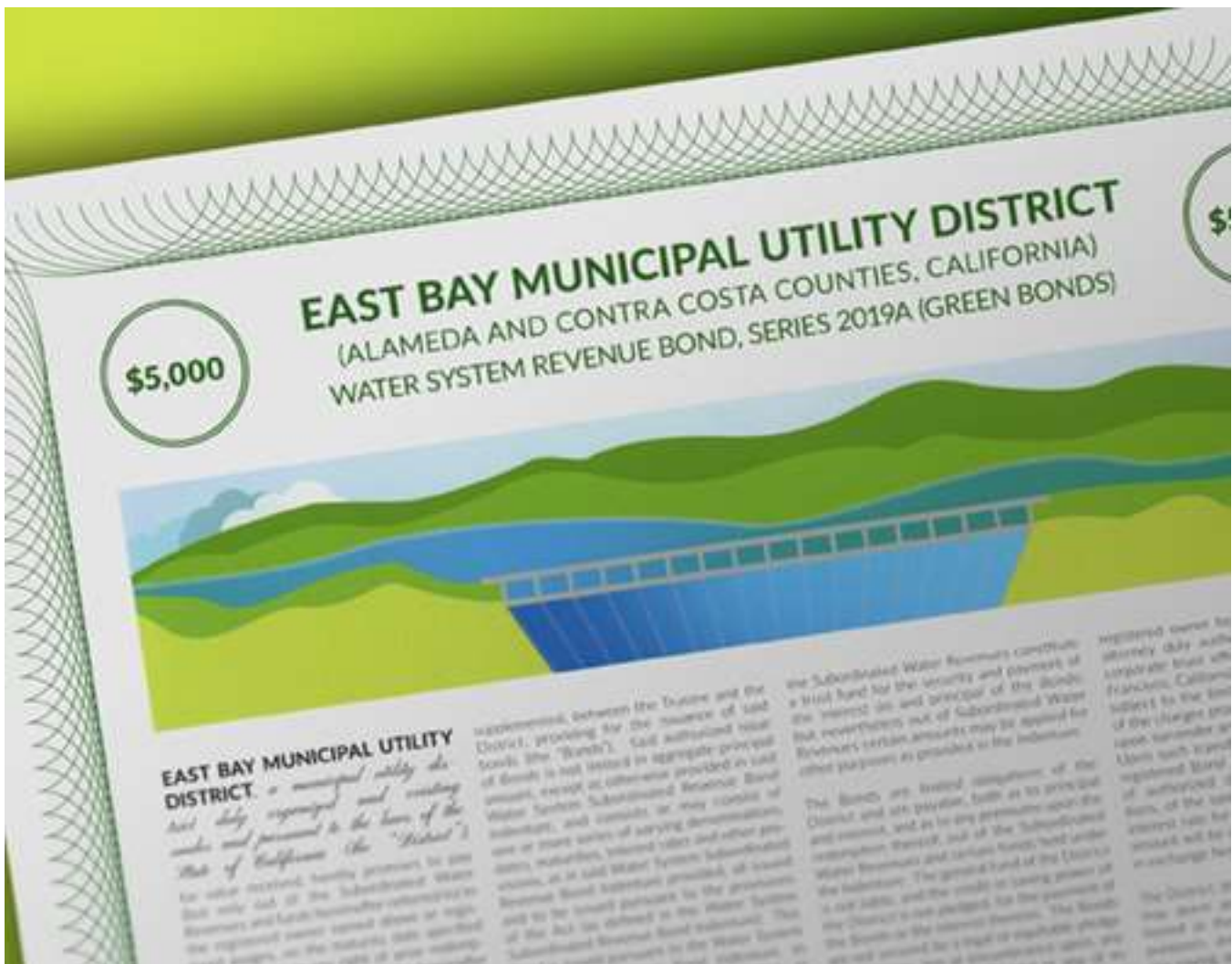
Long-Term Infrastructure Investment

Key Performance Indicator	FY23 Target	FY24 Target
Strategy 1: Master Plans		
Wastewater Interceptor Master Plan	Develop Interceptor Inspection Master Plan	Complete inspections and prepare Draft Wastewater Interceptor Master Plan
Strategy 2: Effective Infrastructure Maintenance		
Number of water system pipeline breaks per 100 miles of pipe	≤ 20	≤ 20
Percent of water system corrective work order hours classified high priority	≤ 10 percent	≤ 10 percent
Miles of pipe surveyed for leaks	≥ 800	≥ 800
Percent of water system valves exercised	≥ 10 percent	≥ 10 percent
Real water losses in gallons per connection per day	The State Water Resources Control Board is developing a water loss performance standard for each urban retail water supplier in California under Senate Bill 555. The District's performance standard has not been finalized.	The State Water Resources Control Board is developing a water loss performance standard for each urban retail water supplier in California under Senate Bill 555. The District's performance standard has not been finalized.
Percent of high priority meter repair orders completed in 60 days	≥ 90 percent	≥ 90 percent
Strategy 3: Capital Budget Priorities		
Miles of distribution pipe replaced	≥ 22.5	≥ 22.5
District directed non-discretionary change orders on construction contracts	≤ 4 percent	≤ 4 percent
MWWTP Administrative Facilities Seismic Retrofits	Complete design	Complete construction
Implement the Orinda Water Treatment Plant Disinfection Improvements (UV/CCB)	Continue construction and report annually in Fall	Continue construction and report annually in Fall
Cumulative annual average number of steel water tanks rehabilitated	2	2
Cumulative annual average number of pumping plants rehabilitated	2	2

Long-Term Financial Stability

Goal: We manage the District’s finances to meet funding needs and maintain fair and reasonable water and wastewater rates.

- Strategy 1:** Maintain a long-range financing plan that sets forth the long-term funding needs of the District.
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- Strategy 4:** Implement technologies that improve the efficiency and effectiveness of business processes.



Green bonds finance infrastructure projects that promote environmental sustainability.

Long-Term Financial Stability

Key Performance Indicator		FY23 Target	FY24 Target
Strategy 1: Long-Range Financing Plan			
Percent of capital program funded from debt over five-year period		≤ 65 percent	≤ 65 percent
Debt service coverage		≥ 1.6 times coverage	≥ 1.6 times coverage
Actual reserves as percent of target		≥ 100 percent	≥ 100 percent
Strategy 2: Rates and Charges			
Water rates as compared to other Bay Area Agencies		At or below median	At or below median
Wastewater treatment charge as a share of the total bill when compared to other Bay Area agencies		At or below median percent	At or below median percent
Strategy 3: Integrity, Accountability and Transparency			
Percent of planned audits completed		100 percent	100 percent
Percent of audit findings resolved within 90 days		100 percent	100 percent
Operating expenditures as a percentage of operating budget		≤ 100 percent	≤ 100 percent
Capital expenditures as a percentage of capital budgeted cash flow		Between 90 percent and 110 percent of a two-year rolling average	Between 90 percent and 110 percent of a two year rolling average
Strategy 4: Technology			
Cyber Security Operational Readiness	Planned patch cycles met	> 90 percent	> 90 percent
	Business recovery exercises	2 per year	2 per year
	Cyber Security awareness events	4 per year	4 per year
	Biennial IT security controls assessment	Implement Critical Security Controls 20 IG2 Improvement Plan	Implement Critical Security Controls 20 IG3 Improvement Plan

Customer and Community Services

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- Strategy 1:** Build public awareness of the District's priorities, initiatives, systems and services.
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- Strategy 3:** Build long-term partnerships in the community, regionally and nationally, in areas of shared interest and in support of the District's mission.
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A Field Services Representative performing an inspection of a water meter with a customer.

Customer and Community Services

Key Performance Indicator		FY23 Target	FY24 Target
Strategy 1: Communications			
Consolidate District education resources		Complete	Review
Conduct media/advertising campaigns		3	3
Publish external digital/print publications		8	8
Participate in community engagement events		100	100
Strategy 2: Customer Satisfaction			
Percent of customers rating the District's services as Good or Excellent: Field Services, New Business, Water Quality, and Recreation		≥ 90 percent	≥ 90 percent
Percent of customers rating Overall Job as Good or Excellent from the customer opinion survey		Conduct research and evaluate outreach methods	N/A
Contact Center service level	Average speed of answer to calls coming into the Contact Center	≤ 60 seconds	≤ 60 seconds
	Percent of calls answered within the target of ≤60 seconds	≥ 80 percent	≥ 80 percent
	Percent of customers rating as Good or Excellent based on first call resolution, staff knowledge, promptness, courtesy, and overall quality	≥ 80 percent	≥ 80 percent
	Abandonment rate	≤ 3 percent	≤ 3 percent
Timely billing of customer statements as scheduled		≥ 99 percent	≥ 99 percent
Percent of time customer dependent systems are available		≥ 99.9 percent	≥ 99.9 percent
Unplanned water service interruptions per 1,000 active accounts	< 4 hrs.	≤ 10	≤ 10
	4-12 hrs.	≤ 5	≤ 5
	> 12 hrs.	≤ 2	≤ 2
Odor complaints near the MWWTP		≤ 30 complaints	≤ 30 complaints
Notify customers in advance of service interruption for non-payment and provide information on options to avoid service interruption for non-payment of bills per District Regulations – Sections 15 and 15A		100 percent	100 percent
Strategy 3: Partnerships and Programs			
Proactively review and update alternative to shut-off program and Customer Assistance Program (CAP)		Continue to address COVID impacts with Board guidance and implement alternative to shut-off program after the health emergency order is rescinded	Annual review and adjustment based on experience
Increase CAP enrollments		Performance Measure Only	Performance Measure Only
Reduce service interruptions for CAP participants		Performance Measure Only	Performance Measure Only
Participate in targeted outreach events in disadvantaged communities to increase CAP enrollment		3	3

Customer and Community Services (continued)

Key Performance Indicator	FY23 Target	FY24 Target
Strategy 4: Emergency Preparedness		
Update the District's Emergency Operation Plan every five years	Complete update	N/A
Conduct the District's Emergency Operations Team exercise annually	Complete annual exercise	Complete annual exercise
Update all Business Continuity plans every two years	Complete updates	N/A
Conduct Business Continuity exercises annually	100 percent	100 percent
Update the District's Risk and Resilience assessment every five years	Complete update	N/A
Conduct annual exercises or meetings with mutual assistance partners and stakeholders	3	3

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Workforce Planning and Development

Goal: We create an environment that attracts, retains and engages a high performing diverse and inclusive workforce in support of the District's mission and core values.

- Strategy 1:** Coordinate workforce planning activities to determine future needs, identify gaps and implement actions to close the gaps.
- Strategy 2:** Continue to develop employees to meet evolving workforce demands and implement actions to close gaps.
- Strategy 3:** Support District values, recognize employee contributions, and establish clear performance measures to achieve a high performance culture.
- Strategy 4:** Enhance the District's ability to recruit a highly qualified, diverse staff that exhibits the District's values.



Employees receive hands-on training in treatment plant operations.

Workforce Planning and Development

Key Performance Indicator	FY23 Target	FY24 Target
Strategy 1: Workforce Plans		
Number of injury & illness incidents resulting in time away from work per 100 employees	≤ 3.0	≤ 3.0
Injury and Illness Investigations (PE-020 forms) completed within 10 working days	>99 percent	>99 percent
Complete departmental workforce plans	Complete	Review
Diversity, Equity, and Inclusion Strategic Plan	Complete and report on all first-year actions in the Two-Year Action Plan	Complete and report on all second-year actions in the Two-Year Action Plan
Annually implement outreach campaigns on wellbeing themes	4	4
Strategy 2: Employee Development		
Annual average training per employee	30 hours	30 hours
Ensure employees complete all required training	Develop tracking process and standards	Implement tracking system and begin pilot
Number of employees in development programs (academies, rotations, internships, mentorships)	Performance Measure Only	Performance Measure Only
Strategy 3: District Values		
Percent of performance plans completed on time	> 99 percent	> 99 percent
Percent of performance appraisals completed on time	> 99 percent	> 99 percent
Strategy 4: Recruitment		
Percent of exams resulting in hiring lists within 60 days	80 percent	80 percent
Percent of candidates on hiring eligibility lists (including employees and external applicants) who identify as minority and/or female	Performance Measure Only	Performance Measure Only
Number of interns	Performance Measure Only	Performance Measure Only
Percent of interns who identify as minority and/or female	Performance Measure Only	Performance Measure Only

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**EAST BAY
MUNICIPAL UTILITY DISTRICT**

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