



**Rancho Murieta  
Community Services District**

**2003 Board of Directors  
Strategic Planning Workshop**

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[Table of Contents](#)

	<b>Page No.</b>
Foreward -----	2
Mission Statement -----	3
District Vision -----	3
Strategic Objectives-----	4
Strategic Action Plan -----	5

## Foreword

Rancho Murieta Community Services District, formed in 1982, provides the following essential services to the young and growing Rancho Murieta community:

- a reliable and healthful water supply,
- collection, treatment and disposal of the community's wastewater,
- operation and maintenance of the drainage system, and
- dependable security services, within a gated community.

It has provided these services efficiently and at a reasonable cost to community residents over the past two decades. Today, Rancho Murieta is home to nearly 2,300 families as well as to a number of businesses. Growth, however, is continuing, and the community is projected to double in size over the next decade or so as it reaches full buildout. The needs and interests of its residents are growing as well.

In light of this situation, the Board of Directors has elected to map out the District's future through a facilitated strategic planning process. Its purpose: to find ways of assuring that the community's needs in all areas will continue to be met in the future, effectively and efficiently.

This Strategic Plan summarizes the principal results of the strategic planning process. Included is a list of specific action items that identifies work responsibilities and target schedules. The detailed notes developed at the Board workshops held during fall 2003, are available as reference items.

Participants in the strategic planning process included the entire Board of Directors, the General Manager, the Administrative Manager, and Security Chief. The workshops and other strategic planning activities were facilitated by Rauch Communication Consultants LLC, Campbell, California.

## Mission Statement

*The mission of Rancho Murieta Community Services District is to take a leadership role in responding to the needs of the residents. The District will deliver superior community services efficiently and professionally at a reasonable cost while responding to and sustaining the enhanced quality of life the community desires.*

## District Vision

During the years from the present through buildout, resident needs will continue to arise that will challenge the capabilities of the District. These challenges may include:

- Maintaining the amenities of a gated community
- Providing an adequate and healthful water supply
- Manage wastewater recycling opportunities
- Ensuring proactive stormwater quality management
- Achieving an appropriate level of local security
- Meeting residents' desire for a quality community based communication and entertainment system
- Addressing the need for adequate roads and reasonable traffic controls
- Offering additional recreational opportunities, including adequate parks, a community center, swimming pool and related amenities
- Providing a thriving and convenient commercial center
- Assuring adequate educational and health services opportunities
- Resolving governance issues caused by division of responsibilities between the Community Services District and Rancho Murieta Association, multiple homeowner's associations, the need for County services, the gradual encroachment of nearby cities, and many other issues.

Addressing these community challenges requires an adaptive and gradually unfolding Strategic Plan. The following pages provide the initial response by the Board of Directors to the challenges of the future.

In these pages, the District has charted many specific actions, some immediate, some in the near term, some for future consideration. The Board has committed itself to reconsider its vision each year, to keep residents fully informed about the issues, and to take appropriate actions that address the needs and wants of Rancho Murieta residents and businesses.

# Strategic Objectives

*The following are the general objectives of the Rancho Murieta Community Services District. Achieving these objectives fulfills the Mission Statement.*

## **1. Provide Needed Community Services**

The District will demonstrate leadership by providing as many of the services that are required by the Rancho Murieta community as it can perform in a practical and cost effective way.

## **2. Optimize the Level of Services**

The CSD will offer services to the community in an effective and efficient manner.

## **3. Employ a Quality Workforce**

The CSD will employ a high quality workforce, and treat its employees as valued partners in the successful management of Rancho Murieta affairs.

## **4. Maintain Good Relationships**

The CSD will maintain open, cordial and cooperative relationships with its residents, Rancho Murieta Association, local cities, local businesses, the County of Sacramento, and other stakeholders in the community.

## **5. Handle Finance Effectively**

The CSD will handle its finances in a well-planned manner, so that it maintains a stable and secure financial position.

# Strategic Action Plan

*The Board of Directors, working closely with its senior staff, has agreed to take the following actions to realize the Objectives of the District.*

## **OBJECTIVE 1: PROVIDE NEEDED COMMUNITY SERVICES**

**The District will demonstrate leadership by providing as many of the services required by the Rancho Murieta community as it can perform in a practical and cost effective way.**

### **Action Area 1.1: Consider Consolidating Rancho Murieta Service Functions by Conducting A Municipal Service Review**

To meet the growing challenges of meeting the community's needs for security, roads, water, wastewater, solid waste, television, drainage, parks and recreation, and many related functions, the CSD will review its own roles and those of the RMA to determine if consolidating some or all required services into one entity might improve services, lower costs, speed delivery and eliminate confusion among the residents.

- **ACTION 1.1.1** Conduct A Municipal Service Review. The following are the initial steps involved:
  - Consider alternative governance forms.
  - Develop concepts for changes to the present governance of Rancho Murieta.
  - Develop a draft Governance Plan covering the internal structure of the CSD to demonstrate how improved governance of the community might be realized.
  - Develop a draft Operations plan, with a draft organization chart, to demonstrate in practical ways how the elements of the draft Governance Plan would come together.
  - Prepare a Financial Analysis to demonstrate economies of scale.
  - Perform a basic legal analysis to assure that the plan is legally acceptable.
  - When the Board has had an opportunity to review the preceding steps, and is satisfied that it makes sense, present the plan to the public in order to respond to questions and concerns and to build community support.

**Who:** Ed

**When:** Consultant Onboard by Summer '04

### **Action Area 1.2: Consider Performing New Services**

- **ACTION 1.2.1** Solid Waste. One of the new services that the CSD could logically perform is solid waste collection and disposal. Take appropriate action to study, plan and undertake solid waste collection and disposal. A likely course of action is to contract out the work to a qualified vendor.

**Who:** Ed

**When:** Underway

### **Parks and Recreation.**

Currently, responsibility for parks and recreation rests with the RMA. But insufficient funds leaves the RMA unable to expand their current services, either in the area of parks or of recreation, such as development of new parks, construction of a swimming pool or skate park, addition of a community center building, and so on.

The CSD may be in a position to offer such services as well as fund them through its tax, assessment or fee structure. The following action was determined:

- **ACTION 1.2.2.** If there is a long term unification of responsibilities between the CSD and the RMA, the CSD will develop an action program to assume additional park and recreation responsibilities.  
**Who:** Ed **When:** After considering consolidation of functions

#### Cable TV and Broadband.

In the past, the RMA Communications Committee has approached the CSD about taking a role in the cable TV service that it currently provides. The CSD is already planning to develop a wireless network to support various internal CSD operations. The following actions are planned:

- **ACTION 1.2.3.** Meet with the RMA president and general manager to explore possible beneficial synergies resulting from combining the TV and Broadband networks and wireless technologies.  
**Who:** President and G.M. **When:** Promptly
- **ACTION 1.2.4.** If promising opportunities exist, seek consultant proposals that describe how such a combined arrangement might work, its features, costs, security issues, scheduling and so forth.  
**Who:** Greg **When:** Spring/Summer 2004

#### **Action Area 1.3: Develop a Security Strategic Plan**

There is a continuing perception by residents that increased security is needed, particularly in patrol, and concerns about the level of security. But 95% of the “crime” at Rancho Murieta appears to be committed by people within the gates, not outside them. Note also that security costs represent about one-third of the total budget of the CSD.

A complete reconsideration of security issues and actions should be undertaken in the form of a Security Strategic Plan. The following action steps are planned:

- **ACTION 1.3.1.** Review security information and data. Based on this review, develop a strawman security plan. Utilize a demographically representative Citizen’s Town Hall to receive education about security issues, discuss residents’ concerns and develop recommendations for improvement.  
**Who:** Committee + Chief **When:** April 2004
- **ACTION 1.3.2.** Communicate the results of the above action (1.3.1) to the residents, using newsletters, public meetings, and so forth. Generally, refine and upgrade all forms of communication with residents. Focus more attention on security in the *Pipeline*.  
**Who:** Communication Comte. **When:** February through June 2004
- **ACTION 1.3.3.** Make changes recommended by 1.3.2  
**Who:** Chief **When:** July through September 2004
- **ACTION 1.3.4.** Check public support for the changes, seek feedback and public response using a statistically accurate poll. Keep public informed.  
**Who:** Communications Comte **When:** Fall 2004
- **ACTION 1.3.5.** Based on all the above, finalize and implement the Security Strategic Plan.  
**Who:** Chief, G.M., Board **When:** End 2004

**OBJECTIVE 2:  
OPTIMIZE THE LEVEL OF SERVICES**  
**The CSD will offer services to the community in an effective and efficient manner.**

**Action Area 2.1: Develop Facilities Master Plan**

Considerable planning work has been done to assure the continued development of new facilities, and the maintenance and replacement issues associated with them. Capital facilities are a large component of the CSD budget. Construction of new facilities associated with growth is normally developer driven, in that the developer pays the costs of the needed additional facilities.

The following actions are planned:

- ACTION 2.1.1. Consider developing a comprehensive Facilities Master Plan that includes all facilities the CSD has built or plans to build. Include also other facilities where the CSD could make a positive difference.  
**Who:** Staff **When:** January 2005
- ACTION 2.1.2. Draw all current planning documents into a single Facilities Master Plan, so that the entire facilities picture can be seen in a single place. This would include scheduling of all major facilities activities, and summarizing their annual costs so that the staff and Board can take appropriate financial actions.  
**Who:** Staff **When:** January 2005

**Action Area 2.2: Evaluate Ways to Use the PTF Swap Parcel**

- ACTION 2.2.1. The PTF Swap Parcel is a valuable piece of property. An optimum use for it is desirable. Evaluate ways to use the PTF Swap Parcel most effectively.  
**Who:** NA **When:** After title transfer has occurred

**Action Area 2.3: Take Water Supply Actions**

The CSD's current water supply is dependent upon the water rights conferred on it by the original developer. These include Cosumnes River diversion rights and the right to store water in various reservoirs. In wet years, there is an adequate water supply, but not in dry years. Various actions have reduced the shortfall, but an augmented supply is necessary.

Limited groundwater options and other issues have led to the development of a Water Augmentation Report, currently underway, which will present water supply options. The following actions are to be undertaken:

- ACTION 2.3.1 Complete the Water Augmentation Report and present it to the Board for consideration of options.  
**Who:** Staff + Consultants **When:** Spring 2004
- ACTION 2.3.2. Develop a Long Term Integrated Alternative Water Supply Plan that looks at all practical water supply options through buildout. Utilize consulting support as needed.  
**Who:** Staff + Consultants **When:** Spring 2005

**Action Area 2.4: Optimize Use of Technology for Operations and Communications**

The District utilizes or is planning the use of advanced technology in numerous ways, including its SCADA system, MIS operations, security, billing, and so forth. Take the following actions:

- ACTION 2.4.1. Issue a RFP for consultant support in developing an Integrated Technology Plan for CSD current and future operations
- ACTION 2.4.2. The second phase would include broadband, TV, and other new potential CSD wireless and SCADA operations, as appropriate.  
**Who:** Greg **When:** March 2004

**OBJECTIVE 3:  
EMPLOY A QUALITY WORKFORCE**

**The District will employ a high quality workforce, and treat its employees as valued partners in the successful management of Rancho Murieta affairs.**

**Action Area 3.1: Increase Depth of Management Team**

Senior management is currently limited to a few individuals. Management time to address issues facing the District is very limited, given the managers' other duties. The general manager in particular has numerous internal and external duties, including district engineer, district secretary, member of all Board committees, chief spokesperson and correspondent for the District, and so on. There is limited backup for the general manager and in fact for all the senior managers if they are away, ill or injured.

To increase the ability of management to deal with their day to day responsibilities as well as the new challenges posed by this Strategic Plan, additional management personnel need to be brought aboard.

The following actions were called for:

- **ACTION 3.1.1.** Develop a Succession Plan that covers all members of senior management, in particular the general manager, administrative manager, field operations director, and security chief.  
**Who:** Staff **When:** March 2004
- **ACTION 3.1.2.** Consider hiring a new District Engineer and a new Operations Manager. Note that the general manager currently carries out the District's engineering and management functions. Hiring an engineer will relieve the manager of these duties, and permit him to focus more fully on carrying out the activities called for in this Strategic Plan.  
**Who:** Staff **When:** March 2004
- **ACTION 3.1.3.** Conduct a general evaluation of ways to optimize the organizational structure and find the best ways to add to the management staff.  
**Who:** Staff **When:** March 2004

**Action Area 3.2: Improve Employee Relations**

It is important to maintain good employee relations by understanding and addressing employee concerns proactively. The following actions were decided upon:

- **ACTION 3.2.1.** The Board must gain a better understanding of the employee compensation history as well as the current situation. Hold a Board workshop to review the history of employee relations and the details of the compensation program. Reestablish the District's approach as appropriate to maximum retention, employee satisfaction and efficiency.  
**Who:** Ed/Greg **When:** Spring 2004
- **ACTION 3.2.2.** Increase employee development and training. Develop an in-house training and development activity. Begin with new hires at the lowest level, increase focus on obtaining required certifications.  
**Who:** Department Managers **When:** Summer 2004
- **ACTION 3.2.3.** Generally, reevaluate the District's current system of training and employee development.  
**Who:** Personnel Committee **When:** March 2004



**OBJECTIVE 4:  
MAINTAIN GOOD RELATIONSHIPS**

**The CSD will maintain open, cordial, and cooperative relationships with its residents, Rancho Murieta Association, and other community organizations, local cities, local businesses, the County of Sacramento, and other stakeholders in the community.**

**Action Area 4.1: Clarify the CSD's Role in the Community**

Because the different roles of the CSD and the RMA are not clear to all residents of Rancho Murieta, there continues a certain level of confusion. The following steps are intended to clarify the situation:

- ACTION 4.1.1. Consider broadcasting CSD Board meetings on the website and over cable TV.  
**Who:** Communications Committee                      **When:** Spring 2004
- ACTION 4.1.2. Use other media as appropriate to clarify the distinct role of the CSD in the governance of Rancho Murieta.  
**Who:** Communications Committee                      **When:** Spring 2004

**Action Area 4.2: Communicate Information About CSD Activities To Residents**

While the CSD has made efforts over the years to keep residents fully informed about the District and its actions, a lack of information appears to persist. This may be the result of shortfalls in the quantity of information communicated as well as in the design of the communication methods used. Adopt the following actions.

- ACTION 4.2.1. Consider a new thematic rather than an information based approach to the newsletter by developing well thought out messages that the Board wishes to communicate, and utilizing consistent themes. The focus would then be on the theme with the information selected to support the theme, rather than be the primary focus.  
**Who:** Communications Committee                      **When:** Spring 2004
- ACTION 4.2.2. The format and readability of the newsletter should also be reviewed for effectiveness and interest to readers. A similar review should be applied to all the communication products of the CSD in order to capture the interest and attention of residents.  
**Who:** Communications Committee                      **When:** Spring 2004
- ACTION 4.2.3. District themes should be repeated often and consistently.  
**Who:** Communications Committee                      **When:** Spring 2004
- ACTION 4.2.4. Focus more attention in Pipeline on security issues. For instance, explain how 95% of residents are satisfied with security. Relatively few are not, but they seem to get the most attention. Explain our intent to review and update the Security Strategic Plan.  
**Who:** Communications Committee                      **When:** ASAP + ongoing

**Action Area 4.3: Develop a More Active Role for the Communication Committee**

As the population of residents grows, increased effective communication will become more necessary and important. The Communication Committee is at the heart of this issue. Take the following action:

- ACTION 4.3.1. Create a more active role for the Communication Committee, so as to match the increasing technology activities of the CSD with an increased flow of useful and effectively communicated information to the residents.  
**Who:** Communications Comte                      **When:** Spring 2004

