

	Initiative	Status	Short Description	Start Date	Completion Date
1.	District GIS System	Initial installtion completed	We have purchased a license with CalCAD. This company provides GIS Services for Special Districts throughout California. Our initial installation included the mapping for the water delivery system, locations of water meters, locations and identifcaiton of fire hydrants, valves and other water related equipment. We are currently working on layers for sewer, drainage, and Security check points. As future needs arrise, we will work with the developer to add. We chose CalCAD over building our own system because the expertise required to maintain this type of program is not sustainable for our size of company.	8/1/2021	Ongoing
2.	Accounts Payable/General Ledger (Great Plains) Integration	Planned for integration with the finance system replacement	The District currently uses AESTIVA as its Purchase Order (P.O.) management software. As of now, we are in the testing phase for implementing integration that will eliminate duplicate data entries, and create a seamless flow of data into the general ledger and expand the system to allow for in-the-field verification of receivables by staff. This upgrade is timely with the current state of needing staff to work remotely.	April 2021	Summer 2022
3.	Accounting System/General Ledger other Integration	Planned for integration with the finance system replacement	We have determined that continued use of the Districts' current financial system, Great Plains, is no longer an option. Based on recommendations of two independent professional accounting firms, it is time for the District to select and purchase a modern fund accounting system. We are requesting funds in the new fiscal year to establish requirements and issue a Request for Proposal for a full system replacement.	April 2021	Summer 2022
4.	Online Billing System review options	Planned for integration with the finance system replacement	We are researching other online billing capabilities that better integrate with the District's financial systems and provide greater flexibility for customers. We are working with our Utility Billing software company to implement their interactive website for viewing their account information and potentially paying their bills. Our struggle is the need to move to a new online payment system. Based on our findings, we may need to take a request to the Board for approval to move to a new bill payment scenario.	April 2021	Summer 2022
5.	Automated HR & Payroll	Planned for integration with the finance system replacement	The PayChex project is completed and staff have embraced the automated timesheet program. The new system has allowed office and management staff manage timesheets and payroll remotely during the current Covid19 crisis.	April 2021	Summer 2022
6.	Maintenance Management and Work Order System	Project on hold	A maintenance management and work order system lets an agency manage work orders and maintenance activities by tracking staff, materials and equipment related to activities. The District is evaluating the feasibility for expanding the use of the current system.	TBA	TBA

	<b>Initiative</b>	<b>Status</b>	<b>Short Description</b>	<b>Start Date</b>	<b>Completion Date</b>
7.	Land Management/Permit System	Researching	The District manages services for every parcel within the District. What is missing is a computerized land management system that allows staff to track all activities related to a parcel or address. Such a system would improve historical records related to each parcel/address improving operations and customer service. Our escrow files now being made electronic is just one resource that could be tied to a computerized land management system. Additionally, we could tie all permits to such a system to ensure that all actions related to an address or parcel are properly recorded. Such a system is composed of tabular and map-based information.	TBA	TBA
8.	Asset Management System (GIS/Data)	Researching	An asset management system is used to manage all infrastructure. This system would contain information for every type of public infrastructure the District manages such as pipes, pump stations, lift stations, basins, etc. The key inputs and metrics of such a system are: What infrastructure do we have, what are the physical properties of the infrastructure, where is it, what condition is it in, when has it been replaced or maintained, and what do we project for maintenance or replacement schedule, and finally, what are the costs for maintenance, rehabilitation or replacement given various funding scenarios? GIS mapping is key as a component tool to produce graphical representations of network condition, maintenance/rehab histories, or project planned improvements based on funding strategies.	TBA	TBA
9.	Customer Management System	Researching	Although a work order system tracks customer maintenance requests, the District is in need of a way to better track customer issues/complaints that may not be related to maintenance activities. We are researching tools for this. It is possible a Land Management System could function in this manner as complaints issues would be tied to a parcel or address and have reporting capabilities to remind staff of outstanding complaints/matters.	Summer 2021	TBA
10.	District Intranet	Completed	This project is now in maintenance mode as part of the SharePoint Cloud File and Collaboration Site	Fall 2019	Ongoing

	<b>Initiative</b>	<b>Status</b>	<b>Short Description</b>	<b>Start Date</b>	<b>Completion Date</b>
11.	Cyber Security	Ongoing	We are contracted with WECybr Inc., an Idaho-based Cyber Security company with roots in the Sacramento region, as a partner with the District's Information Technology Managed Services Provider, A Leap Ahead IT. WECybr specializes in small business cybersecurity and has identified many of our risks, developed an action plan to address these risks and is helping upskill our staff on how to recognize cyber-attacks.	Fall 2020	Ongoing
12.	Establish a process to post District messages to NextDoor	Completed	The District has a working agreement with the Sacramento County Public Information Office that allows us to post onto NextDoor. This agreement is basic at this time. In general, there are three distinct NextDoor Neighborhoods within the Rancho Murieta CSD. This includes the residences and businesses in the area South of Highway 16 (155 subscribers), RM North (1,963 subscribers), and Rancho Murieta South (909 Subscribers). These counts were updated in the Spring of 2021	Fall 2020	Ongoing