IRONHOUSE

SANITARY DISTRICT

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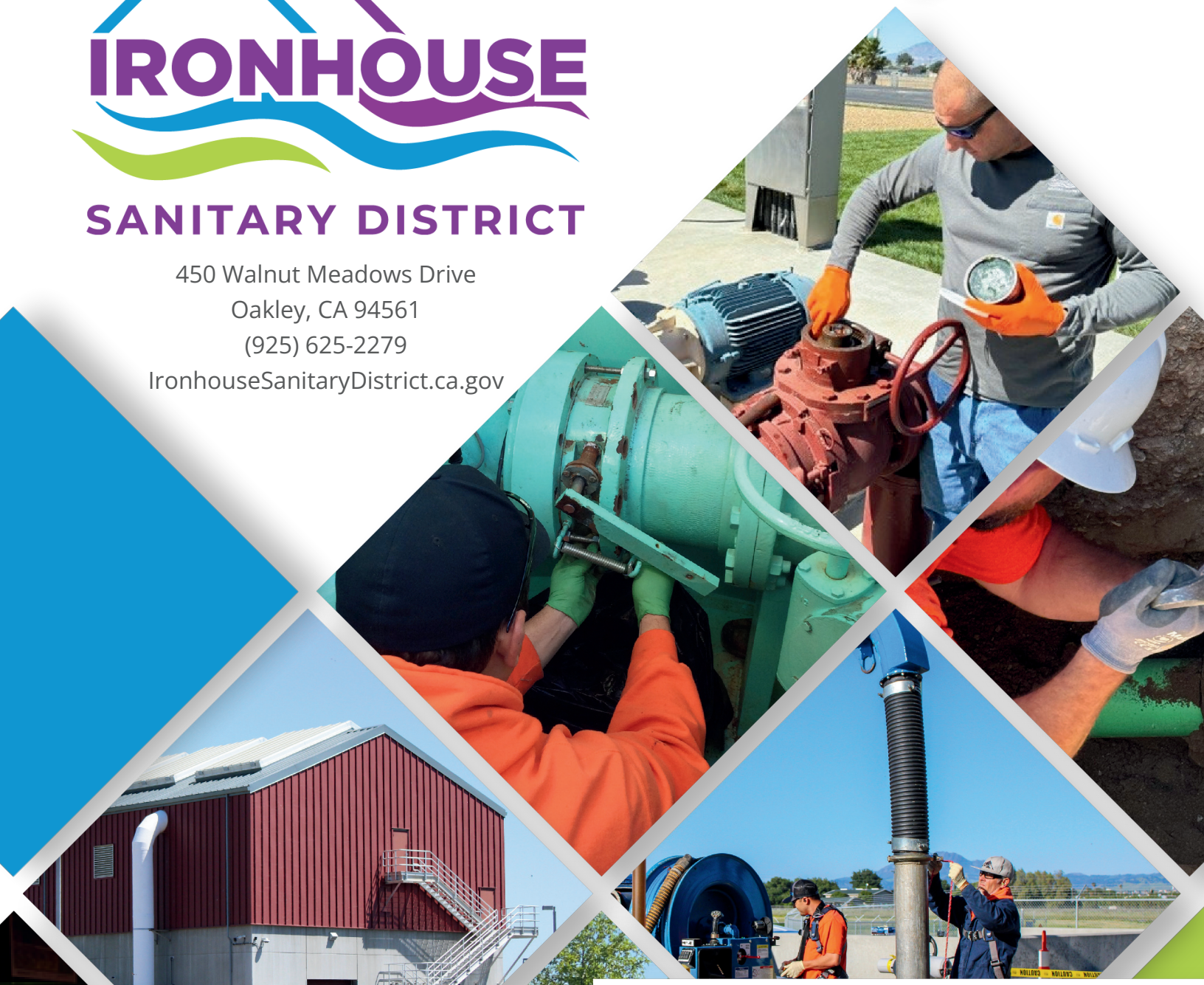

2027-2031 STRATEGIC PLAN

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Foreword

Ironhouse Sanitary District Strategic Plan 2027-2031 (SP31)

For more than 80 years, Ironhouse Sanitary District has served as a trusted steward of public health and the environment. From its beginnings in 1945 as a small sanitary district serving the rural community of Oakley, Ironhouse has evolved into a modern wastewater resource recovery utility providing essential services to the growing and dynamic communities of Bethel Island and Oakley. Throughout this evolution, our fundamental commitment has remained unchanged: to protect public health, safeguard our environment, and provide reliable, efficient, and sustainable wastewater services.

As we look toward the future, we recognize that the challenges and opportunities facing our District are increasingly complex. Aging infrastructure, continued community growth, evolving regulatory requirements, climate change, emerging technologies, and rising operational costs require thoughtful planning, prudent investment, and organizational adaptability. At the same time, these challenges present opportunities to strengthen our infrastructure, advance environmental sustainability, improve operational efficiencies, and deliver greater value to the communities we serve.

The Ironhouse Sanitary District Strategic Plan 2027–2031 (SP31) establishes a clear roadmap to address these challenges and position the District for long-term success. Developed to guide the Board of Directors and staff over the next five years, the six goals reflect our shared commitment to operational excellence, environmental stewardship, fiscal responsibility, transparency, and responsive public service.

1. Operational Reliability and Long-Term Performance of Infrastructure
2. Environmental Sustainability and Community Resilience
3. Public Engagement and Strategic Partnerships
4. Strong Board Governance
5. Enduring Organization
6. Fiscal Responsibility

Importantly, this Strategic Plan is more than a statement of aspirations. It establishes specific initiatives, performance measures, and implementation milestones to enable us to evaluate progress, demonstrate accountability, and adjust our priorities as circumstances evolve. Through quarterly progress reporting and annual reviews, the Board and staff will ensure that our strategic objectives remain aligned with the District's operational needs, financial resources, and community expectations.

At the heart of this Plan is the recognition that our greatest assets are the people we serve and the employees who serve them. The dedication, professionalism, and expertise of our workforce, together with the leadership of our Board of Directors and the trust of our ratepayers, provide the foundation for everything we accomplish. We also recognize that meaningful progress depends on collaboration with our community, neighboring agencies, regulatory partners, and other stakeholders.

As we enter this next chapter, we remain committed to balancing today's service obligations with tomorrow's needs. We will continue to embrace innovation, maintain fiscal discipline, pursue environmental progress while ensuring operational reliability, and invest in infrastructure and people to preserve the quality of service our community expects and deserves.

We extend our appreciation to the Board of Directors, District employees, and community partners for their contributions in shaping this Strategic Plan. Its successful implementation will require continued engagement, collaboration, and a shared commitment to excellence.

Sincerely,

Angela Lowrey, M.Sc.
President, Board of Directors

Jean-Marc H. Petit, P.E., CSDM
General Manager

MISSION

Safeguard public health and our environment by providing sustainable wastewater collection, advanced treatment, and water reuse.



VISION

Continue to be a leader in sustainable wastewater management, recognized for resilience, environmental stewardship, fiscal accountability, and public service.



VALUES

We value:

- A healthy, safe, skilled, productive, and resilient organization and workforce
- Responsible management of public resources and infrastructure assets
- Reliable wastewater services
- Innovation
- Protection of water quality and environmental resources through sustainable practices
- Protect positive relationships through active internal, external collaborations and community engagement
- Transparent and prudent financial management



Goals and Strategies

Strategic Goals, Strategies, and Implementation Plan

The updated Ironhouse Sanitary District Strategic Plan 2027-2031 (SP31) establishes six goals, supported by strategies, to guide the District's decisions, investments, and organizational priorities for the next five fiscal years, FY 2026-27 through FY 2030-31. The plan reflects the Board of Directors' commitment to protecting public health and the environment, providing reliable wastewater services, maintaining financial stability, supporting employees, and serving the community.



Goals and strategies are supported by initiatives. The implementation plan includes a responsible lead, completion date or recurring schedule, and performance measures for each initiative or Key Performance Indicator (KPI).

Staff will report on implementation quarterly and present a comprehensive review to the Board annually. The annual review will assess results, explain significant variances, and recommend adjustments to priorities, schedules, and targets for Board consideration through the budget and capital planning processes.

Goal 1

Operational Reliability and Long-Term Performance of Infrastructure

Provide reliable, resilient, and cost-effective wastewater collection, treatment, and recycled water infrastructure through proactive planning, strategic investment, comprehensive asset management, and sound engineering practices.

Strategy 1.1 *Optimize Asset Management Practices to Guide Capital Investment Decisions*

Initiatives	KPIs	Completion Date	Lead
Implement an update to the Asset Management program that links asset inventory, condition, criticality, maintenance, and replacement planning.	Define critical assets.	December 30, 2027	Operations Departments
	Measure the percentage of critical assets with verified inventory records, condition assessments, risk ratings, and maintenance or replacement plans.	Annually, starting Spring 2028	

Strategy 1.2 *Prioritize Infrastructure Investments Based on Risk, Condition, Operational Need, and Ratepayer Impact*

Initiatives	KPIs	Completion Date	Lead
Initiate an ESCO project to advance the WRF Capital Improvement Projects.	Issue the RFP and select an ESCO Firm.	Nov. 1, 2026	Engineering Department
	Complete ESCO Phase 1 to identify project elements to determine the GMP and the guaranteed energy savings.	June 30, 2027	
Establish a CIP Reporting Policy and Procedure Handbook, including the WRF deferred maintenance backlog.	Present the policy and handbook to the Board; document backlog priorities, vendor and consultant oversight, budgets, schedule variances, and corrective actions in quarterly CIP updates.	Annually with quarterly updates	Engineering Department with Operations; GM oversight



Strategy 1.3 *Plan Proactively for System Growth and Long-Term Capacity Needs*

Initiatives	KPIs	Completion Date	Lead
Complete the load study update to review treatment and conveyance capacity annually.	Report available estimated capacity relative to defined planning thresholds, using documented flow and loading assumptions, and identify the timing of recommended improvements when needed.	Annually	Engineering Department

Strategy 1.4 *Coordinate Capital Projects and Strengthen Emergency Response Partnerships*

Initiatives	KPIs	Completion Date	Lead
Update Emergency Response Plan.	Present to the Board.	Annually by June 30	Administration Department, AGM
Conduct annual emergency response exercises.	Complete annual exercise and coordinate with partnership agencies.	Annually by June 30	Administration Department, AGM
Prepare, adopt, and test the IT Disaster Recovery Plan under the Technology Master Plan.	Plan adopted and recovery test completed; document results and corrective actions.	Annually	Administration Department – IT and AGM; Operations for OT
	Present integrated IT and OT progress updates, including the Cybersecurity Roadmap.	IT Disaster Recovery Plan adopted and tested by June 30, 2027	





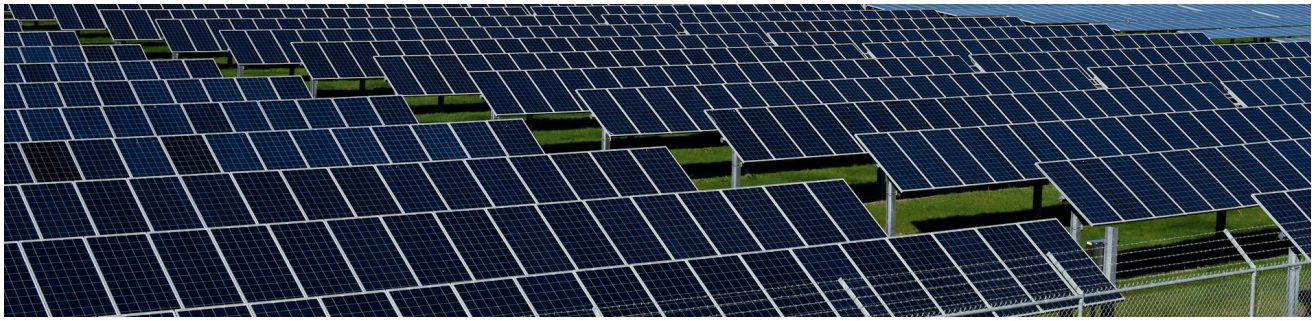
Goal 2

Environmental Sustainability and Community Resilience

Protect water quality and environmental resources through sustainable operations, responsible resource management, regulatory compliance, and resilient infrastructure that benefits current and future generations.

Strategy 2.1 *Support Beneficial Reuse Opportunities and Resource Recovery*

Initiatives	KPIs	Completion Date	Lead
Increase use of recycled water for landscaping at the District.	Complete the Design and award the landscaping project associated with the U.S. EPA Grant.	June 30, 2027	Engineering Department
	Complete the construction of the landscaping project.	November 30, 2028	
Complete a biosolids management business case evaluation.	Provide results to the Board, including life cycle cost, operational feasibility, environmental benefits, and implementation risks.	December 31, 2028	Engineering Department
	Implement best case solution.	June 30, 2031	
Complete design of the infrastructure required for the PPA solar infrastructure.	Track accepted design deliverables against the approved scope, budget, and schedule.	June 30, 2028	Engineering Department
	Accept the project and energize the new solar project.	June 30, 2029	
Evaluate improved contract terms for the District's first solar system PPA (Luminace).	Report negotiation outcome to the Board; present improved terms for approval as soon as available or explain why improved terms could not be obtained.	As soon as available; by June 30, 2027	GM with Engineering Department and District Counsel



Strategy 2.2 *Incorporate Resilience and Sustainability into District Planning*

Initiatives	KPIs	Completion Date	Lead
Assess flood and sea level rise risks on District mainland Property.	Complete the Water Recycling Facility flood and sea level rise risk assessment, identify priority mitigation measures, and submit the applicable Letter of Map Revision (LOMR) documentation to FEMA.	June 30, 2029	Engineering Department

Strategy 2.3 *Strengthen Environmental Stewardship Practices*

Initiatives	KPIs	Completion Date	Lead
Continuing electronic Board packet distribution.	100% electronic distribution.	Annually by June 30	Secretary of the District (SOD)
Develop a District Sustainability Plan.	Present the draft Plan to the Board for adoption.	June 30, 2028	Administration Department

Strategy 2.4 *Promote a Culture of Regulatory Compliance*

Initiatives	KPIs	Completion Date	Lead
Maintain compliance with all wastewater discharge permits.	Zero permit violations, on-time completion of required monitoring and reporting, and timely closure of corrective actions.	Annually	Operations Departments (Collection and WRF)
Continue updating the Permit Management System.	Complete updating of the Klir Software Permit Tracking and Management System implementation.	Annually	Administration Department - AGM





Goal 3

Public Engagement and Strategic Partnerships

Build trust and strengthen relationships through transparent communication, meaningful community engagement, exceptional customer service, and collaborative partnerships that advance the District's mission and support the communities it serves.

Strategy 3.1 *Expand Public Access to District Information Through Timely, Multi-Channel Communication*

Initiatives	KPIs	Completion Date	Lead
Maintain a modern, user-friendly District website that provides up-to-date project information.	Review and update website content monthly; report improvements quarterly and as they occur; complete and report an accessibility review, identifying corrective actions.	Annually	Public Communications Specialist and SOD
Develop a Communications Program.	Present the draft implementation plan to the Board.	February 28, 2027	Public Communications Specialist and GM
Complete a Crisis Communication Plan.	Develop and exercise a Crisis Communication Plan that identifies staff responsibilities, approval procedures, notification channels, and coordination with external partners.	June 30, 2027	Public Communications Specialist

Strategy 3.2 *Broaden Community Education and Outreach on District Programs, Services, and Infrastructure*

Initiatives	KPIs	Completion Date	Lead
Attend community-sponsored events in Oakley and Bethel Island.	Track the number of attendees and audience to tailor our participation. Present results to the Board.	Annually	Public Communications Specialist



Strategy 3.3 *Proactively Communicate the Value of District Investments to Strengthen Accountability and Public Confidence*

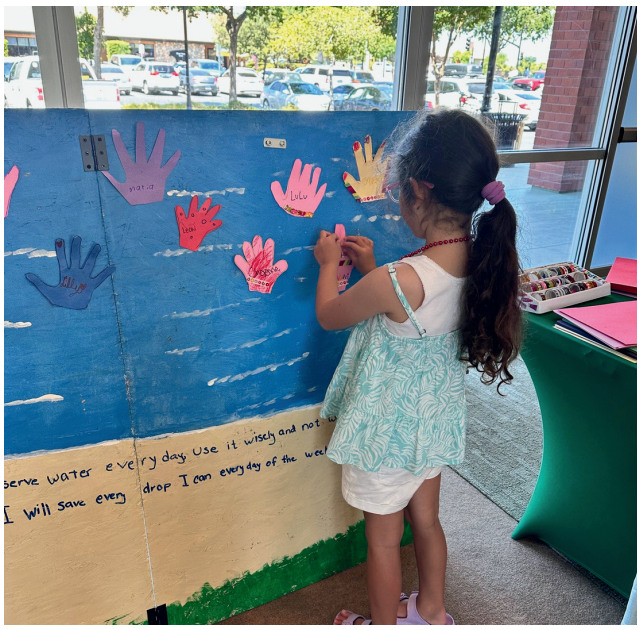
Initiatives	KPIs	Completion Date	Lead
Provide public updates on major capital projects.	Project updates posted on the website, social media, and media releases using dashboards.	Annually	Public Communications Specialist

Strategy 3.4 *Build and Sustain Relationships with Strategic Partners*

Initiatives	KPIs	Completion Date	Lead
Continue the joint recycled water project partnership with Diablo Water District using the U.S. EPA grant.	Track grant milestones against the approved schedule and report completion and variances; report DWD partnership status at the January 2027 mid-year check-in.	Grant schedule; January 2027 check-in	AGM and Engineering Department
	Coordinate with the landscaping project under Strategy 2.1.	FY review by June 30, 2027	

Strategy 3.5 *Deliver High-Quality Customer Service*

Initiatives	KPIs	Completion Date	Lead
Streamline permit applications and development review processes.	Launch the customer portal and improve permit application and development review workflows.	June 30, 2027	Engineering Department





Goal 4

Strong Board Governance

Promote effective governance through informed decision-making, strategic leadership, transparency, accountability, and continuous Board development to ensure the District remains responsive to its customers and prepared for future challenges.

Strategy 4.1 *Ensure Board Members Receive Timely, Consistent, and Complete Information*

Initiatives	KPIs	Completion Date	Lead
Provide complete, well-written, professionally edited Board packets and public-facing materials.	Complete a documented completeness and editorial review before distribution; distribute 100% of packets on schedule under Board policy; track substantive corrections and address recurring errors.	Every meeting and public release	SOD and Public Communications Specialist; GM oversight
Finalize the Strategic Plan 2027–2031 (SP31).	Complete and obtain Board adoption of the SP 31.	December 1, 2026	Administration Department – GM
	Report implementation progress to the Board.	Quarterly and annual progress reports	



Strategy 4.2 *Engage the Board as Active Participants in Strategic Planning, Budget Development, and Capital Project Prioritization*

Initiatives	KPIs	Completion Date	Lead
Integrate Strategic Plan priorities into the annual budget development process.	Identify the Strategic Plan goal, funding source, and delivery year for each proposed major capital project and strategic operating initiative.	Annually – during budget preparation in 1st quarter (Jan/Feb)	Administration Department - GM
Review major infrastructure projects at key project milestones.	Board updates provided for all major projects.	Annually	Engineering Department
Provide regular CIP updates supported by the reporting policy and handbook.	Present quarterly CIP reports covering project milestones, budgets, vendor and consultant performance, deferred maintenance, variances, and corrective actions; coordinate financial dashboards under Strategy 6.1.	45 days after the close of the quarter	Engineering Department with Finance and Operations

Strategy 4.3 *Promote Continuous Board Development, Ethical Leadership, and Good Governance*

Initiatives	KPIs	Completion Date	Lead
Complete all required trainings.	100% compliance. Complete all required Director training within applicable deadlines.	Annually	SOD/Board President
Encourage participation in CSDA, CASA, CWEA, and other governance conferences.	All Board members attend at least one conference annually.	Annually	SOD/Board President
Provide orientation program for newly elected or appointed Directors.	Orientation completed.	Within 30 days after each election	SOD and District Counsel

Strategy 4.4 *Foster Transparency, Accountability, and Public Confidence*

Initiatives	KPIs	Completion Date	Lead
Complete and update District policies and procedures and publish approved policies.	Maintain a policy inventory and review schedule; submit policies incrementally in smaller, more frequent groups; complete the comprehensive review and publish policies following review and approval. Report completed and outstanding items.	Comprehensive review by June 30, 2027; incremental submissions throughout FY 2026–27	GM with Department Leads, SOD, and District Counsel
Pursue the CSDA Transparency Certificate with Board participation.	Submit the application; report certificate attainment or remaining requirements at the January 2027 check-in; track assigned staff and Board actions through completion.	January 2027 status; completion by June 30, 2027	SOD and GM with Board participation



Goal 5

Enduring Organization

Develop and sustain a highly skilled, engaged, and resilient workforce by investing in employee development, succession planning, workplace safety, organizational culture, and operational excellence to ensure the long-term success of the District.

Strategy 5.1 *Identify Critical Positions, Document Essential Knowledge, and Develop Succession Plans*

Initiatives	KPIs	Completion Date	Lead
Expand cross-training opportunities across departments.	Report critical positions with documented succession or continuity plans, annual plan reviews, and identified coverage gaps.	Annually	Administration Department - HR

Strategy 5.2 *Invest in Employee Training and Professional Development*

Initiatives	KPIs	Completion Date	Lead
Support professional certifications and license renewals.	Certification compliance maintained.	Annually	Administration Department - HR
Expand leadership development opportunities for staff.	Track the number of professional development courses taken by staff and for emerging supervisors.	Annually	Administration Department - HR
Support continuing education and tuition reimbursement.	Participation tracked annually.	Annually	Administration Department - HR



Strategy 5.3 *Establish Recruitment and Hiring Practices that Reflect District Values*

Initiatives	KPIs	Completion Date	Lead
Review recruitment and retention performance annually and implement improvements as needed.	Report time to fill by position type, qualified applicant pools, offer acceptance, and turnover.	Annually	Administration Department - HR

Strategy 5.4 *Establish Clear Performance Expectations and Career Development Opportunities*

Initiatives	KPIs	Completion Date	Lead
Maintain annual employee performance evaluations.	Complete performance evaluations by their scheduled due dates for all eligible employees.	Annually	Administration Department - HR
Continue employee recognition.	Maintain an employee recognition program and review participation and employee feedback annually.	Recognition annually, on the employee's anniversary	Administration Department - HR



Strategy 5.5 *Promote a Culture of Workplace Safety, Wellness, and Cybersecurity Preparedness*

Initiatives	KPIs	Completion Date	Lead
Maintain comprehensive District Safety Program.	Annual Safety Program review and updates completed.	Annually	Administration Department - AGM
Conduct monthly safety meetings and regular field safety inspections.	100% scheduled meetings completed. Report injuries, near misses, and corrective actions without creating incentives to suppress reporting; use multi-year context for low event counts.	Monthly	Administration Department – HR and all Department Leads
Provide annual cybersecurity training for all employees.	100% employee participation.	Annually	Administration Department – IT
Provide safety training for all employees.	100% employee participation.	Annually	Administration Department - AGM









Goal 6

Financial Responsibility

Maintain long-term financial stability through responsible fiscal stewardship, prudent investment of public resources, sustainable rate structures, and strategic financial planning that supports reliable wastewater services and protects future generations.

Strategy 6.1 *Operate a Well-Managed Organization that Emphasizes Integrity, Transparency, and Accountability*

Initiatives	KPIs	Completion Date	Lead
Prepare annual operating and capital budgets aligned with Strategic Plan priorities.	Adopt the operating and capital budgets before the start of each fiscal year and identify their alignment with Strategic Plan priorities.	Annually	Administration Department - GM
Maintain compliance with Government Finance Officers Association (GFOA) budgeting and financial reporting best practices.	Continued recognition for financial excellence.	Annually	Administration Department - Finance
Publish an Annual Financial Report (ACFR) summarizing District finances and accomplishments.	Report published annually.	Annually	Administration Department – Finance/AGM
Maintain strong internal financial controls and independent audits.	Obtain an Unmodified (clean) audit opinion.	Annually	Administration Department - Finance/AGM
Prepare operating and CIP expenditure dashboards.	Present the proposed CIP dashboard by fiscal year-end.	Quarterly	Finance Department with Engineering; GM oversight
	Present O&M dashboard to the Board using data from the OpenGov financial module, showing budget, actual expenditures, and variances.	December 15, 2026	

Strategy 6.2 *Maintain Financial Stability Through Responsible Fiscal Stewardship and Long-Term Financial Planning*

Initiatives	KPIs	Completion Date	Lead
Maintain a rolling ten-year financial forecast.	Forecast of CIP updated annually.	Annually	Engineering Department
Maintain reserve balances consistent with Board policy.	Reserve targets achieved.	Annually	Finance Department
Integrate Capital Improvement Program (CIP) with long-range financial planning.	CIP funding plan updated.	Annually	Engineering Department
Continue prudent investment of District funds in accordance with the Investment Policy.	Investment performance meets policy objectives.	Annually	Finance Department
Evaluate accelerated funding of the other post-employment benefits obligation.	Present written options for early payoff, including cost, cash-flow effects, reserve impacts, and implications for long-term financial stability, at the mid-year check-in.	January 2027	Finance Department and GM
Complete the Jersey Island sale, subject to required approvals and transaction conditions.	Present the recommended path to closing, remaining conditions, responsible parties, and schedule.	January 2027 update where possible	GM with District Counsel and Finance; coordinate with RD 830 as applicable
	Report closing or unresolved conditions and revised timing.	Target closing by February 2027	



Strategy 6.3 *Identify and Implement Cost Savings and Operational Efficiencies*

Initiatives	KPIs	Completion Date	Lead
Integrate fiscal accountability through cost-efficiency evaluations.	Document evaluations completed and report identified efficiencies; distinguish projected from realized savings, implementation costs, and service impacts.	Annual report with budget and financial updates	GM and Finance with all Department Leads

Strategy 6.4 *Support Rate Stability Through Strategic Financial Decision-Making*

Initiatives	KPIs	Completion Date	Lead
Review user fees and development-related charges periodically to ensure cost recovery.	Review user fees and development-related charges annually and update supporting studies at a Board-approved interval or when material conditions change.	Annually	Engineering Department



Acronyms Used

AGM	Assistant General Manager
CASA	California Association of Sanitation Agencies
CIP	Capital Improvement Project
CSDA	California Special Districts Association
CWEA	California Water Environment Association
FEMA	Federal Emergency Management Agency
ESCO	Energy Services Company
IT	Information Technology
GIS	Geographic Information Systems
GM	General Manager
GMP	Guaranteed Maximum Price
KPI	Key Performance Indicator
LOMR	Letter of Map Revision
OT	Operational Technology
PPA	Power Purchase Agreement
RD 830	Reclamation District 830
RFP	Request for Proposal
SOD	Secretary of the District
U.S. EPA	United States Environmental Protection Agency
WRF	Water Recycling Facility



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