



# Fallbrook Public Utility District

## Triennial Strategic Plan

**2025-2028**





## *A Note from the Board of Directors*

The Fallbrook Public Utility District (FPUD) has proudly served the Fallbrook community for over a century. Founded in 1922 to serve residents, businesses, and farms, FPUD has grown into a full-service utility delivering safe and reliable water, wastewater services, and recycled water to over 35,000 people across 28,000 acres, while supporting Fallbrook's thriving agricultural economy. Today, FPUD leads the way in developing diverse water supplies and deploying innovative technologies to better serve its customers.

Exciting milestones have ushered in a new era. In 2023, FPUD successfully transitioned from the San Diego County Water Authority to Eastern Municipal Water District, securing a more affordable, sustainable source of imported water. At the same time, FPUD bolstered local water reliability through the Santa Margarita River Conjunctive Use Project and the launch of its Groundwater Treatment Plant, now providing nearly half of the District's potable water needs. FPUD also strengthens supply sustainability by producing 500,000 gallons of recycled water daily.

Building on this momentum, FPUD has embarked on this triennial Strategic Plan. Shaped by input from community stakeholders, employees, and the Board of Directors, the Plan charts a bold, actionable course—sharpening focus, aligning priorities, and ensuring FPUD remains resilient, responsive, and ready to meet the challenges and opportunities ahead.

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# OUR MISSION

Delivering exceptional water, wastewater and recycled water services and value to meet the evolving needs of the Fallbrook community.





# OUR VISION

To continually advance innovative and sustainable solutions that provide outstanding utility service and deliver positive community outcomes.



# Our Guiding Principles

Guiding Principles are the core values that define how we lead, work, and serve. They set the standards for decision-making, shape our organizational culture, and ensure that our actions reflect a shared commitment to excellence, integrity, and service.



**Community**  
Our customers,  
our home.



**Trust**  
Integrity and  
transparency,  
everyday.



**Innovation**  
Lead, create, and  
adapt.



**Drive**  
Fueled by pride,  
empowered to  
achieve.



**Stewardship**  
Financial,  
infrastructure,  
and resource  
sustainability.



**Alliances**  
Collaborate and  
partner for better  
outcomes.



**Workplace**  
A culture of respect,  
opportunity, and  
safety for every  
employee.



# Strategic Priorities, Goals, and Objectives

1

## Customer Service Excellence

Goal: Provide an exceptional and responsive customer service experience that exceeds community expectations.

1A

**Establish a customer follow-up survey system and performance benchmarking to ensure exemplary levels of service.**

- **Customer Insights** - Gather feedback, analyze areas for improvement and make adjustments as needed, to ensure timely, friendly, and comprehensive responses to customer needs.
- **Performance Benchmarking** - Develop and track industry-leading customer service performance metrics and benchmark to help focus efforts for enhancing service delivery.





**1B**

## Enhance Customer Services through quick response times, issue resolution and online access to account information.

- **Customer Data Management and Transparency** – Keep customer account information up to date and enhance accessibility for detailed and transparent account insights.
- **Service Efficiency and Responsiveness** – Streamline service orders for faster response times to service requests and disruptions. Track customer interactions with CityWorks and the updated Enterprise Resources Planning (ERP) system to ensure service continuity. Maintain accurate customer contact data for District notifications.
- **Cross-Departmental Coordination** – Ensure seamless communication by involving the appropriate departments and public affairs in handling customer inquiries.
- **Customer Feedback** – Develop a post customer service interaction automated survey process and potential incentives to receive timely feedback from customers on FPUD’s level of service. Explore mobile phone-based solutions for customer reporting on leaks, repairs and other in-field service issues.

# 2

## Exemplary Workforce and Culture

Goal: Foster a motivated and skilled workforce that exemplifies FPU D's Guiding Principles and drives organizational excellence.



### 2A

#### Promote a strong employee culture with clear opportunities for training and advancement.

- **Employee Growth and Development** – Invest in mentorship, certifications, and career progression to foster continuous learning and advancement.
- **Engagement and Communication** – Strengthen employee connection through open and accessible feedback channels and regular engagement opportunities.
- **Recognition and Retention** – Cultivate a supportive culture with structured recognition programs and leadership development initiatives.

### 2B

#### Implement cross-training and provide enhanced employee development opportunities.

- **Strategic Cross-Training** – Identify key roles, analyze skill gaps, and implement phased cross-training for critical areas.
- **Career-Aligned Development** – Integrate cross-training with career growth through trial periods, mentorship, and performance evaluations, and develop mechanisms to solicit employee interest in promotion and advancement.
- **Structured Job Rotations** – Facilitate exposure to different roles while minimizing disruption to district operations through incremental training.



## 2C

### Renew the District's focus on enhancing recruitment and retention of staff.

- **Competitive Compensation** – Benchmark salaries and benefits to peer agencies and industry standards to ensure fair and equitable compensation.
- **Enhanced Onboarding** – Strengthen new employee integration and retention.
- **Leadership Development** – Invest in training and career growth initiatives.
- **Data-Driven Retention** – Use analytics to address turnover trends.
- **Succession Planning** – Address workforce evolution and retirements by identifying key positions and establishing individual development plans for promotion or targeted external recruitment.
- **External Partners** – Partner with universities and local trade and technical schools to establish and promote workforce development programs, internships, and career opportunities.

## 2D

### Implement enhanced safety initiatives to protect employees and the community without compromise.

- **Safety Culture and Accountability** – Implement a Board, executive leadership, supervisory and staff level commitment to creating a culture of safety without compromise.
- **Comprehensive Safety System** – Implement industry-leading safety protocols, audits, and risk assessments.
- **Proactive Risk Management** – Conduct ongoing assessments and preventive measures.
- **Ongoing Training and Emergency Preparedness** – Provide role-specific safety training and conduct emergency planning exercises for emergency preparedness.
- **Regulatory Compliance** – Align with the highest level of industry standards and collaborate with regulatory bodies.
- **Transparency and Reporting** – Establish positively reinforced anonymous reporting systems for safety concerns.
- **Community Safety Engagement** – Partner with local organizations to promote public safety and communicate the District's safety initiatives and culture.

# 3

## Operational Optimization and Partnerships

Goal: Streamline operations through innovation and collaboration with regional partners to leverage technology, maximize efficiency, enhance cost effectiveness and improve water supply reliability.

### 3A

**Leverage inter-agency relationships, shared services and functional consolidation opportunities to increase efficiency and cost effectiveness.**



- **Leadership and Mentorship Partnerships** – Develop regional leadership and mentorship program with neighboring agencies in San Diego, Orange and Riverside Counties to improve regional collaboration and increase staff efficiency.
- **Infrastructure Funding Opportunities** – Seek to identify projects and programs among neighboring water agencies in San Diego and Riverside Counties for infrastructure repair and rehabilitation and pursue joint state and federal grant funding.

### 3B

**Establish mutual aid and shared services agreements with Rainbow, Valley Center, and Yuima water districts to implement collaboration, resource sharing and reduce costs.**

- **Inter-Agency Collaboration** – Hold regularly scheduled meetings with key department heads of the agencies to identify opportunities for expanding shared services to improve efficiency.
- **Shared State and Federal Advocacy** - Initiate shared services for state and federal lobbying resources to cost effectively ensure agencies continue to have a voice in federal and state legislation and funding opportunities.
- **Resource Tracking** – Maintain jointly accessible staff training and certification information and updated equipment records to improve emergency staffing and resource access and sharing.



## Develop potential operations partnerships and revenue opportunities with USMC Camp Pendleton (CPEN).

- **Wastewater System Contract Operations** - Collaborate with CPEN staff to finalize the Intergovernmental Services Agreement (IGSA), build a trusting, long-term relationship with base staff, and improve the District's wastewater enterprise economy of scale to help reduce the District's wastewater rates.
- **Maintenance Support** - Continue providing support for various base needs using the shared services framework of Santa Margarita Conjunctive Use Project (SMCUP) to perform water system repairs, provide treatment plant assistance, and to address any other issues identified by CPEN.



## Collaborate with regional partners to support the development of supplemental water supplies.

- **Alternative Local Water Supplies** – Evaluate alternative water supply and storage options with regional partners to address drought impacts to Santa Margarita River supply and increase overall water supply resiliency for the community.
- **Potable Reuse Partnership** – Work with CPEN to advance the development of the Indirect Potable Reuse project on the base to increase the yield of the groundwater basin and provide the District additional local water supplies.

# 4

## Fiscal Sustainability and Transparency

Goal: Maintain strong financial stewardship and long-term planning to ensure the district's economic stability and adaptability to future fiscal challenges.



### 4A

#### Maintain financial stability, strong financial metrics and high credit quality.

- **Align Costs of Service and Customer Benefits** – Continue implementing cost-of-service rate-making best practices to ensure fair and equitable rates and charges that carefully align with the benefits received by each customer class and demands they place on the system.
- **Managing Unfunded Liabilities** – Proactively fund and prudently manage unfunded liabilities through dedicated and transparent funding mechanisms.

### 4B

#### Plan for uncertain growth outlook, slowing development, and fluctuating sales.

- **Address Water Sales Volatility and Trends** - Evaluate water sales forecasts to reflect current conditions and growth projections to mitigate rate and charge volatility.





## Develop methods and strategies to provide cost containment and address inflation on top of already high rates.

- **Focused Management Plan for Key Cost Drivers** – Develop a thorough cost management plan that emphasizes optimization and risk mitigation strategies for the District’s largest external cost drivers, including energy consumption, chemicals, and materials and supplies.



## Understand and address financial and customer impacts from potential state-mandated water affordability programs.

- **Water Affordability Requirements** – Track pending legislation requiring agencies to establish Low Income Rate Assistance (LIRA) programs and if passed, establish a program that is compliant and utilizes rate-making best practices while minimizing the District’s administrative costs.

# 5

## Infrastructure and Technology Stability

Goal: Invest in and maintain reliable infrastructure and advanced technology to improve efficiency, support sustainable operations, system longevity and security.

### 5A

#### Focus on capital investments by identifying and prioritizing the most vulnerable aging infrastructure in FPUd for replacement and refurbishment.

- **Infrastructure Renewal Plan** – Establish a strategy to meet 100-year pipeline and 30-year valve replacement goals and implement an enhanced meter testing and replacement program to mitigate apparent water losses and meter under-registration.
- **Replacement and Refurbishment Funding** – Develop and implement a long-term replacement reserve funding strategy to avoid abrupt rate increases for significant future replacement and refurbishment projects such as the Red Mountain Reservoir liner.
- **Technology Integration** – Explore advanced solutions to enhance pipeline condition assessments and replacement targeting.
- **Data-Driven Decision Making** – Leverage CityWorks to automate Key Performance Indicator tracking and reporting.

### 5B

#### Integrate information management systems to provide better operational insights.

- **Enhanced Data and System Integration** – Develop comprehensive dashboards to improve managerial data access, fully utilize the capabilities of district-wide information management systems and modernize the District's Enterprise Resource Planning.

### 5C

#### Take preventative measures to address increasing cyber security risks and threats.

- **Data Security and Threat Protection** – Adhere to current security best practices, perform regular vulnerability assessments, and update systems as needed using industry-leading security programs.



# 6

## Safe and Reliable Water, Wastewater, and Recycled Water Services

Goal: Ensure the delivery of highly reliable water, wastewater, and recycled water services that meet or exceed customer needs while safeguarding public health and the environment.

### 6A

#### Provide foremost protection of public and environmental health.

- **Meet or Exceed All Quality Standards** - Ensure FPUD's potable water supplies, recycled water and treated effluent meet or exceed all applicable Federal and State water quality standards to ensure protection of public health and the environment.



### 6B

#### Resolve water quality related operational challenges in the District's potable water system (low demands, aging water, and system constraints).

- **Water Quality Enhancement** – Commission and optimize chloramine dosing stations at the 8 MG Tank to ensure consistently disinfected water throughout DeLuz and at the Sachse Tank to provide stable water quality to the central portion of the distribution system.
- **Disinfection Optimization Strategy** – Review all water supply operating scenarios and develop a comprehensive strategy to address disinfection challenges in various areas in the District's potable water distribution system.
- **Infrastructure and Service Expansion** – Collaborate with Rancho California Water District and Rainbow MWD to construct interties to improve system reliability and resilience.
- **Improved Water Treatment** – Enhance water quality from Red Mountain Reservoir by considering taste and odor treatment at the UV Treatment Plant and optimizing reservoir management and chemical control.

6C

## Plan and prepare for state regulations (Water Use Efficiency, water quality including PFAS and other regulated contaminants, zero emissions standards).

- **Collaboration on Emerging Contaminants** – Maintain close coordination with the State Water Resources Control Board Division of Drinking Water (DDW) and stay updated on the latest research and regulatory initiatives to address emerging contaminants.
- **Knowledge Sharing and Participation** – Engage in technical symposia and regional operator meetings focused on emerging contaminants.

6D

## Address wildfire vulnerability from Public Safety Power Shutoff (PSPS) power outages and harden infrastructure where needed.

- **System Resilience and Backup Power** – Install a generator at the Santa Margarita Groundwater Treatment Plant and provide backup power at remote sites to maintain communication and operations during PSPS and wildfires.
- **Critical Infrastructure Rehabilitation** – Finalize the Vista del Rio Pump Station to enhance water transfer between Fallbrook and Deluz Pressure Zones
- **Power Reliability Improvements** – Replace the Uninterruptible Power Supply (UPS) at the UV Treatment Plant to ensure seamless transitions to generator power during outages and plan and install UPS systems at other key remote sites.



6E

## Optimize Recycled Water Opportunities and Benefits

- **Maximize Beneficial Reuse** – Continue to evaluate all financial and outside funding opportunities, internal uses, and potential partnerships for recycled water beneficial uses and revenue generation.



# 7

## Stakeholder Understanding and Community Support

Goal: Build trust and engagement with stakeholders through proactive messaging, transparent communication, education, and proactive outreach efforts.

### 7A

#### Work with the Agricultural community to review rates, charges and policies, jointly develop Agricultural customer sustainability initiatives, and seek grants.

- **Agricultural Stakeholder Committee** – Engage the agricultural community by developing a stakeholder group to solicit feedback and refine the grant funding approach.
- **Agricultural Grant Funding** – Identify and pursue grant opportunities that support agricultural sustainability, including at least two agriculture-focused grants. Seek additional funding for the CropSWAP program, including exploring opportunities through Farm Bill efforts.
- **Rate Structure Evaluation** – Engage the stakeholder group to develop potential rate structure modifications that would better support the agricultural business model and usage patterns while maintaining compliance with Proposition 218.

### 7B

#### Enhance efforts to engage all sectors of ratepayers with diverse cultural backgrounds.

- **Cultural Event Participation** – Participate in culturally focused community events such as “Fallbrook a Leer” Reading/Family Literacy event, Cesar Chavez Day of Service and Learning, and Dia de los Muertos festivities to enhance community access to the District and its resources.
- **Enhanced Spanish-language Communications** – Create social media posts and other outreach in Spanish to improve engagement of Latino stakeholders and provide better access to information regarding the District’s services.



7C

## Improve outreach and communications on multiple platforms and in community forums to optimally position FPUD as the “trusted resource” for all information on water.

- **Enhanced Communications Platforms and Activities** – Implement a proactive plan to improve content and delivery of information through social media, bill inserts, and other methods, and by providing engaging and interactive activities for children and adults at community events.
- **Community Engagement and Outreach** – Attend and present up-to-date information on the District at community and nonprofit meetings to keep stakeholders informed.
- **Relationship Building** – Foster trust and collaboration by building and maintaining strong relationships with community stakeholders on FPUD matters and projects.
- **Inclusive Representation** – Engage all ratepayer sectors, ensuring representation of Fallbrook residents across diverse backgrounds and languages.
- **Enhanced Emphasis on Transparency** – Develop targeted materials and content for use on various platforms to clearly and consistently communicate the benefits of the San Diego Water Authority detachment, and the value proposition supporting why FPUD’s rates are incrementally higher when compared to other water agencies.

7D

## Enhance effectiveness of the school education program.

- **School Calendar Contest and Water Education** – Continue the school calendar contest and promote water education and the District by distributing the calendars free at grocery stores, the Chamber of Commerce, and FPUD.
- **Career Fair Participation** – Attend elementary and high school career fairs and provide targeted materials on water career opportunities and jobs at FPUD.





# Acknowledgments

This Triennial Strategic Plan was developed through collaboration among the FPUD Leadership Team, the Board of Directors, participating staff members and key community stakeholders.

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