



## STRATEGIC PLAN

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2025-2030

*The mission of the Spalding Community Services District is to provide quality Wastewater, Fire Protection and Recreation services to our community in a professional, reliable, and fiscally-responsible manner.*

**502-907 Mahogany Way, Susanville, CA 96130**

**530-825-3258**

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## DECLARATION STATEMENT

The **Spalding Community Services District Strategic Plan 2025-2030** represents the unified vision and collective commitment of the Spalding Community Services District Board of Directors, staff, and community members.

By adopting this Strategic Plan, we affirm its purpose as the singular guiding framework for advancing the district’s mission to provide quality Wastewater, Fire Protection, and Recreation services. The Plan reflects our shared values, aspirations, and dedication to fostering a safe, clean, and vibrant community.

This Strategic Plan serves as a living document, designed to adapt to evolving needs and opportunities while remaining steadfast in its core objectives. It ensures accountability, encourages collaboration, and aligns District operations with the long-term interests of the Spalding community.

We hereby declare our commitment to implementing the goals, objectives, and tasks outlined within this Strategic Plan and pledge to govern and manage the district with integrity, transparency, and a steadfast focus on the well-being of Spalding and its residents.

**Adopted by the Spalding Community Services District Board of Directors on [Insert Adoption Date].**

_____	_____	_____
Board Chairperson (Name)	Signature	Date
_____	_____	_____
Board Vice Chair (Name)	Signature	Date
_____	_____	_____
Board Member (Name)	Signature	Date
_____	_____	_____
Board Member (Name)	Signature	Date
_____	_____	_____
Board Member (Name)	Signature	Date
_____	_____	_____
General Manager (Name)	Signature	Date

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**BOARD OF DIRECTORS**

**2025**

Larry Doss  
Kathy Claytor  
Glyne Johnson  
Ellen Stallings  
Jerald Oliver

**2024**

Theodore Thomas  
Ed Lawson  
Larry Doss  
Frank Muse  
Barbara Willard

**VOLUNTEERS**

Kari Graton, Interim Volunteer General Manager  
Diane Graton, Volunteer Office Manager  
Frank Muse, Interim Volunteer Fire Chief

**STRATEGIC PLANNING**

**AD HOC COMMITTEE**

Ted Thomas  
Frank Muse  
Diane James  
Dan James  
Ellen Stallings  
Amy Hagen

**STAFF**

Vincent Rogers, General Manager  
Kelly Handy, Office Receptionist II  
David Handy, Wastewater Operations Technician  
Robert King, Municipal Worker

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**DOCUMENT CONTROL RECORD**

**DOCUMENT REVISION RECORD**

<b>No.</b>	<b>Name</b>	<b>Author/Reviewer</b>	<b>Title</b>	<b>Date of Revision</b>
1.	Spalding CSD Strategic Plan 2025-2030 DRAFT 1	V. Rogers	General Manager	2024-12-13
2.	Spalding CSD Strategic Plan 2025-2030 DRAFT 2	V. Rogers	General Manager	2025-01-16
3.				

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## EXECUTIVE SUMMARY

The Spalding Community Services District (SCSD) Strategic Plan 2025-2030 outlines a roadmap for achieving operational excellence, enhancing community services, and ensuring sustainable growth over the next five years. This comprehensive plan is guided by the district's mission, vision, and guiding principles, emphasizing good governance, collaboration, and proactive leadership.

### Introduction

The Strategic Plan highlights SCSD's commitment to providing quality wastewater, fire protection, and recreation services. It reflects the district's role in fostering a clean, safe, and vibrant community while supporting Spalding as a regional hub in Lassen County.

### Mission, Vision, and Guiding Principles

SCSD's mission focuses on professional, dependable, and fiscally responsible service delivery. Its vision includes reliable emergency response, environmental stewardship, enhanced recreation facilities, and community partnerships.

#### Mission

*The mission of the Spalding Community Services District is to provide quality Wastewater, Fire Protection and Recreation services to our community in a professional, reliable, and fiscally responsible manner.*

#### Vision

- 1. We provide the community with reliable and effective emergency response.*
- 2. We work proactively to keep our community and environment clean and safe.*
- 3. We strive to make our recreation facilities improve life and add joy to Spalding.*
- 4. We support the community as a regional destination and partner in Lassen County.*
- 5. We enhance our community's quality of life through honorable service.*

#### Guiding Principles

These values are supported by the guiding principles of the Four Pillars of Good Governance:

- 1. Values, Ethics, and Purpose: Upholding integrity and transparency.*
- 2. Working Together Towards a Common Goal: Fostering teamwork and collaboration.*
- 3. Transformational Leadership: Inspiring progress through visionary management.*
- 4. Informed and Ethical Decision-Making: Ensuring accountability and informed decision-making.*

### Strategic Plan Development

The development process incorporated community input, committee guidance, and alignment with internal and external plans. Five key Strategic Plan Elements were identified to guide SCSD's efforts.

### Organizational Structure and Core Operations Areas

SCSD's operations are divided into five Core Operations Areas, each vital to the district's long-term success:

- Governance & Management: Policymaking, recordkeeping, and fiscal oversight.
- Administration & Finance: Business operations, customer relations, and office technology.
- Fire Protection: Emergency response and incident management.
- Wastewater Services: Maintenance and monitoring of the sewer system.
- Recreation: Event management and community facility upkeep.

Roles and responsibilities are distributed across the Board of Directors, General Manager, Administrative Assistant, and other key staff.

### **Standing Committee Structure**

Three standing committees—Operations, Finance, and Recreation & Community Development—will support the Strategic Plan implementation:

#### *Operations Committee*

Oversees technical and operational projects, including Capital Improvement Plans.

#### *Finance Committee*

Focuses on fiscal sustainability, budget reviews, and funding strategies.

#### *Recreation & Community Development Committee*

Enhances community life through recreational planning and visioning for community needs.

### **Strategic Plan Elements**

#### *Element 1: Capital Improvement Planning:*

Ensures infrastructure is maintained and upgraded through proactive planning, systematic repairs, and reserve-building.

#### *Element 2: Fiscal Health:*

Promotes financial stability through sound budgeting, revenue growth, and resource management.

#### *Element 3: Community Development:*

Enhances quality of life by improving recreation facilities, hosting events, and fostering Spalding as a regional destination.

#### *Element 4: Administrative Practice:*

Streamlines internal processes to improve efficiency, compliance, and public engagement.

#### *Element 5: Regional Cooperation & Mutual Aid:*

Strengthens partnerships with neighboring agencies to enhance emergency response and resource sharing.

### **Goals, Objectives, Tasks and Timeline**

Each Strategic Plan Element includes specific goals, measurable objectives, and detailed tasks. Key milestones include:

- Development of a comprehensive Sewer System Management Plan by December 2025.
- Completion of staggered Capital Improvement Plans within 2.5 years of Strategic Plan adoption.
- Implementation of financial sustainability measures and administrative enhancements.

### **Integration and Plan Maintenance**

This plan integrates seamlessly with SCSD's internal policies and external partnerships. A regular review schedule ensures that the plan remains relevant and adaptable to emerging needs.

### **In Summary**

The SCSD Strategic Plan 2025-2030 reflects a unified vision for advancing the district's mission, fostering community well-being, and achieving operational excellence. Through collaboration, effective governance, and strategic resource management, the district is well-positioned to meet the evolving needs of Spalding and its residents.

## INTRODUCTION

### BACKGROUND

The Spalding Community Services District Plan 2025-2030 will guide the district in its operations for the next five years, i.e., the Strategic Plan Period. The highest-level planning document for the District, the Strategic Plan reiterates the Mission, outlines the Vision of the District as well as describes any additional planning processes, for example Capital Improvement Planning, which may occur within the Strategic Plan period.

The plan describes the Organization Structure, Functions, Roles & Responsibilities, Strategic Elements, Goals, Objectives, and Tasks that will ensure the district can fulfill its duties during the Strategic Plan period. Additional considerations implicitly discussed in the plan include organizational needs and operating environment.

Spalding CSD provides the critical infrastructure and essential services necessary for protecting, sustaining, and enhancing the quality of life in the Community of Spalding. The purpose of the Strategic Plan is to guide SCSD's operations through the next five years in a way that delivers and expands on the services the district provides.

### MISSION

*The mission of the Spalding Community Services District is to provide quality Wastewater, Fire Protection and Recreation services to our community in a professional, reliable, and fiscally responsible manner.*

### VISION

- 1. We provide the community with reliable and effective emergency response.*
- 2. We work proactively to keep our community and environment clean and safe.*
- 3. We strive to make our recreation facilities improve life and add joy to Spalding.*
- 4. We support the community as a regional destination and partner in Lassen County.*
- 5. We enhance our community's quality of life through honorable service.*

## GUIDING PRINCIPLES: THE FOUR PILLARS OF GOOD GOVERNANCE

This Strategic Plan has been developed and should be implemented under the guiding principles of the Four Pillars of Good Governance.

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### PILLAR #1 VALUES, ETHICS, AND PURPOSE

Shared values and ethical standards are essential for local governments to function effectively. Having a clear purpose and understanding the ethical framework ensures responsible decision-making and accountability.

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### PILLAR #2 WORKING TOGETHER TOWARDS A COMMON GOAL

Local authorities must collaborate toward a shared objective. When all members work cohesively, they can achieve better outcomes for their community.

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### PILLAR #3 TRANSFORMATIONAL LEADERSHIP

Effective leadership drives positive change. Transformational leaders inspire innovation, motivate others, and create a vision for progress. This shared vision for progress is defined through strategic planning.

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### PILLAR #4 INFORMED AND ETHICAL DECISION-MAKING

Local governance relies on well-informed decisions. Transparency, ethical considerations, and a commitment to serving the public interest are crucial in decision-making processes.

## STRATEGIC PLAN DEVELOPMENT

The Spalding CSD Strategic Plan 2025-2030 development process began in 2024. During a Special Meeting on April 1<sup>st</sup>, 2024, during which the Board of Directors, led by then-Chairman Ted Thomas and supported by Interim General Manager Kari Graton, facilitated a Strategic Planning Workshop which defined the Mission and Vision Statements for Spalding CSD, as well formed an Ad Hoc Committee to begin process of Strategic Plan Development.

The Ad Hoc Committee succeeded in defining several critical Strategic Plan elements surrounding Capital Improvement Planning, Fiscal Health, and Community Development. Following the definition of these overarching goals and the culmination of the Ad Hoc Committee, the Staff of the district were directed by the Board of Directors to identify Strategic Plan elements essential to the internal organization and operating environment of the district.

With the hiring of additional staff in the form of an Administrative Assistant in July of 2024, and the subsequent appointment of a General Manager in September, six months of operational research and assessment ensued. Resultingly, two additional Strategic Plan elements were identified, one for Administrative Practice and the other for Regional Cooperation & Mutual Aid. Finally, based on this internal evaluation, Staff have laid out the Goals, Objectives, Tasks and Timelines associated with each of the Strategic Plan Elements as presented herein.

In the General Election held in November of 2024 held in consolidation with the Lassen County, a new Board of Directors was appointed to the office. The Board of Directors took office in December of 2024. The draft Strategic Plan was first presented for review and approval by the Board of Directors at the first Regular Meeting of the Board of Directors in January 2025.

## OVERVIEW

The Spalding CSD Strategic Plan 2025-2030 is comprised of the following essential sections which define at the highest level the capacity and vision of the district to meet its mission and achieve its vision for the district in the next five years.

## STRATEGIC PLAN ELEMENTS

The Strategic Plan Elements identified by the Board of Directors, Ad Hoc Committee and Staff during 2024 include:

**Element 1 - Capital Improvement Planning** – To maintain and improve the district’s infrastructure by completing near-term repairs, reviewing, and updating management plans, establishing Capital Improvement Plans and building Capital Reserves.

**Element 2 - Fiscal Health** – To improve the district’s fiscal status, by implementing standard operating procedures, securing grants, growing the budget, and satisfying audit recommendations.

**Element 3 - Community Development** – To bring the community closer together and make Spalding a safe and desirable place to live, visit, and recreate.

**Element 4 - Administrative Practice** – To improve the efficiency and rigor of the administrative functions of the district, with emphasis on professionalism, expedience, transparency, and information security.

**Element 5 - Regional Cooperation & Mutual Aid** – To improve the district’s position as a Regional Cooperator and form a resilient network of Mutual Aid.

## STRATEGIC PLAN IMPLEMENTATION

### *GOALS & OBJECTIVES*

Specific Goals, Objectives, Tasks and Timelines are identified that are underlying each of the Strategic Plan Elements. Wherever possible, the Goals identified have been informed by SMART Goals methodology, which defines a “SMART Goal” as one that is Specific, Measurable, Achievable, Realistic, and Timely.

### *PLAN CONFORMANCE*

However, some Goals, Objectives, Tasks and Timelines of the Strategic Plan surround the initiation of planning activities, the formation of committees, the development of procedures, and the collection of information necessary to embark on additional planning activities.

These activities, committee findings, procedural testing, and information collection may inform the inclusion of additional Strategic Plan Elements. As such, the plan is dynamic. It should be reviewed annually and may be amended at the discretion of the Board of Directors due to significant changes in organization or operating environment.

The Strategic Plan Elements, together with their underlying Goals, Objectives, Tasks & Timelines, should be considered distinct but related matters of co-equal importance, and as such, Leadership and Management, should be committed to incremental progress in each element over the Strategic Plan period.

It is understood that significant changes in organizational structure, capacity or operating environment may necessitate concerted organizational focus on one specific Strategic Plan Element or Core Operations Area for some time. Regardless, it should be the responsibility of Leadership & Management to resume Strategic Plan Element pursuits holistically as soon as is practical to do so.

Therefore, Leadership & Management should be considered responsible for commitment to and implementation of the Strategic Plan over the Strategic Plan period, but it is understood that some Strategic Plan Elements may be updated, revised, or sustained through subsequent plan periods.

The Strategic Plan Elements, Goals, Objectives, Tasks and Timelines as are presented roughly in order of priority for the present organizational structure, capacity and operating environment, all considered.

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#### *PLAN MAINTENANCE*

The Strategic Plan shall be updated every five years and reviewed annually. A plan review schedule is included herein that describes the Strategic Plan development process as well as its relation to the other planning processes of the District, principally, Capital Improvement Planning.

### ORGANIZATION STRUCTURE

The Spalding Community Services District Organization Structure (**Figure 1**) defines the essential operations and functions of the district, described as Core Operations Areas, including Roles and Responsibilities of Leadership and Staff for Strategic Plan Implementation.

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#### *CORE OPERATIONS AREAS*

The Core Operations Areas of Spalding Community Services District include:

- **Governance and Management** (including committees)
- **Administration & Finance**
- **Fire Protection**
- **Wastewater Services**
- **Recreation**

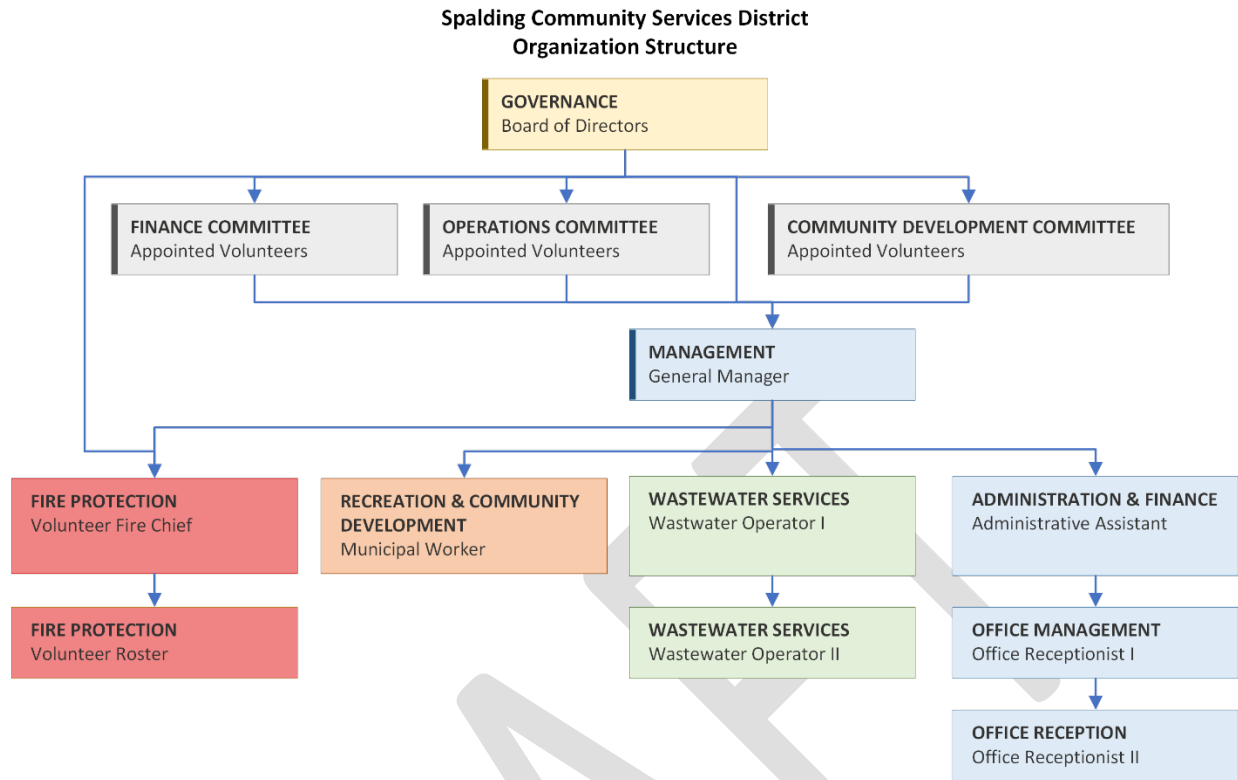
Each Core Operation Area should be considered essential to the viability and longevity of District and the Community of Spalding and are thus subject to their own Strategic Plan directives, some of which may yet need to be defined by Committee proceedings.

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#### *ROLES & RESPONSIBILITIES*

Broadly speaking, the Board of Directors, especially the Chairperson and Vice Chairperson, of the Spalding Community Services District shall be defined as the “Leadership” of the district. The “Management” of the district consists of the General Manager, Administrative Assistant, and Fire Chief. The “Staff” of the District include the





Wastewater Operator, Municipal Worker and Office Receptionists, as well as any Designated Volunteers that may include Committee service and leadership or clerical support.

## CORE OPERATIONS AREAS

### GOVERNANCE & MANAGEMENT

#### *FUNCTIONS*

The primary functions of the Governance & Management Core Operations Area include the essential Public Administration functions of the district such as Policy Making, Recordkeeping, Budgeting, Fiscal Oversight, and Public Relations functions of the District.

#### *ROLES & RESPONSIBILITIES*

The primary responsibility for implementing the Strategic Plan Elements affecting the Governance and Management Core Operations Area lies with the Board of Directors and the General Manager (as the Board Secretary).

### ADMINISTRATION & FINANCE

#### *FUNCTIONS*

**Figure 1** Spalding Community Services District Organization Structure

The primary functions of the Administration & Finance Core Operations Area include the essential business administration functions associated with operations of District including Human Resources, Payroll, Accounts Receivable, Accounts Payable, Customer Relations, Recordkeeping, Office Technology & Communications.

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*ROLES & RESPONSIBILITIES*

The primary responsibility for implementing the Strategic Plan Elements affecting the Administration & Finance Core Operations Area lies with the General Manager and Administrative Assistant.

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**FIRE PROTECTION**

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*FUNCTIONS*

The primary functions of the Fire Protection Core Operations Area include the essential operations associated with protecting the community from fire and responding to medical or other emergency calls. Additionally, the Spalding CSD Fire Department, led by the Fire Chief, serves as Incident Command for firefighting coordination and other emergency response activities unless and until an agency of higher jurisdiction has assumed incident command.

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*ROLES & RESPONSIBILITIES*

The primary responsibility for implementing the Strategic Plan Elements affecting the Fire Protection Core Operations Area lies with the Fire Chief and the General Manager.

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**WASTEWATER SERVICES**

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*FUNCTIONS*

The primary functions of the Wastewater Services Core Operations Area include the essential operations associated with operating, monitoring, inspecting, maintaining, and repairing the Wastewater Collections system.

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*ROLES & RESPONSIBILITIES*

The primary responsibility for implementing the Strategic Plan Elements affecting the Wastewater Services Core Operations Area lies with the Wastewater Operator and the General Manager.

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**RECREATION**

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*FUNCTIONS*

The primary functions of the Recreation Core Operations Area include the essential operations associated with Events Management, Recreation Facilities maintenance and sanitation, and Community Evacuation Coordination.

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*ROLES & RESPONSIBILITIES*

The primary responsibility for implementing the Strategic Plan Elements affecting the Recreation Core Operations Area lies with the Municipal Worker and the General Manager.

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**STANDING COMMITTEE STRUCTURE**

To expedite the completion of Tasks for certain Strategic Plan Elements, Goals and Objectives, it is recommended that the Board of Directors establish and appoint the members of three Advisory or Standing Committees consisting of the Operations Committee, Finance Committee and Recreation & Community Development Committee.

Though the Board of Directors and Committees may wish to reorganize and/or amend or revise their scope and purpose as appropriate to organizational needs, examples of the Purpose and Activities are provided below.

## OPERATIONS COMMITTEE

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### *PURPOSES*

The Operations Committee oversees the district's core operational areas, including Fire Protection, Wastewater Services, and infrastructure maintenance, ensuring efficient service delivery and planning for future needs.

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### *ACTIVITIES*

- Conduct Technical Evaluation of operational systems (e.g., fire protection, wastewater).
  - Conduct Technical Evaluation of operational systems contracting, bids, and procurement.
  - Oversee the development and implementation of department-specific **Strategic Plans** and **Capital Improvement Plans (CIPs)**.
  - Review and recommend updates to operational policies, procedures, and standards.
  - Monitor the progress of infrastructure improvement projects.
  - Facilitate public workshops to gather community input on operational priorities.
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## FINANCE COMMITTEE

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### *PURPOSES*

The Finance Committee ensures the district's financial health by recommending policy, developing procedures, establishing general financial management plans, reviewing budgets, financial reports, and funding strategies while promoting fiscal responsibility and sustainability.

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### *ACTIVITIES*

- Develop and review the **5-Year Financial Plan**, including operational budgets and reserves.
  - Oversee the preparation and evaluation of funding strategies for CIPs and other projects.
  - Assess current financial management systems and recommend upgrades or improvements.
  - Monitor revenue and expenditure trends to ensure compliance with fiscal policies.
  - Provide recommendations to the General Manager and Board of Directors regarding grants, loans, and other funding opportunities.
  - Conduct Commercial Evaluation of operational systems contracting, bids, and procurement.
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## RECREATION & COMMUNITY DEVELOPMENT COMMITTEE

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### *PURPOSES*

The Recreation & Community Development Committee focuses on enhancing community life through recreational opportunities, event planning, and facility improvements.

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### *ACTIVITIES*

- Conduct community surveys to assess recreational needs and priorities.
- Develop the **5-Year Recreation Master Plan** and **5-Year Recreation Capital Improvement Plan (CIP)**.
- Plan and oversee community events, activities, and public outreach initiatives.
- Recommend improvements for recreational facilities and coordinate maintenance efforts.
- Collaborate with stakeholders to promote Spalding as a regional destination.

## STRATEGIC PLAN ELEMENTS - OVERVIEW

The Strategic Planning process and staff-driven operations research defined the following Strategic Plan Elements to guide the district through the Strategic Plan period.

### ELEMENT 1: CAPITAL IMPROVEMENT PLANNING

Capital Improvement Planning is vital for maintaining and upgrading the district’s infrastructure. It ensures that facilities, such as wastewater systems, fire protection equipment, and recreational amenities, remain reliable, safe, and compliant with regulations. By systematically prioritizing repairs and improvements, the district can manage resources effectively, avoid costly emergencies, and plan for long-term community growth and sustainability.

- **Ensures Long-Term Sustainability:** By proactively planning for future infrastructure needs (sewer system, fire equipment, recreation facilities), the district can ensure the long-term sustainability and reliability of essential services.
- **Avoids Reactive and Costly Repairs:** Capital Improvement Plans (CIPs) allow for the identification and prioritization of necessary upgrades and replacements, preventing costly emergency repairs and potential service disruptions.
- **Facilitates Efficient Resource Allocation:** CIPs help the district allocate resources effectively, ensuring that funds are used wisely and strategically to address the most pressing infrastructure needs.
- **Improves Service Delivery:** By investing in infrastructure improvements, the district can enhance the quality and efficiency of service delivery to the community.

### ELEMENT 2: FISCAL HEALTH

Maintaining robust fiscal health is essential for the district’s ability to provide quality services and invest in future improvements. Proper financial planning, budgeting, and reserve management protect the district from economic uncertainties, ensure transparency, and build trust with the community. Fiscal health also supports the acquisition of grants and loans, enabling major projects and operational efficiency.

- **Ensures Financial Stability:** Sound financial management is crucial for the district’s long-term viability. Strong fiscal health allows the district to meet its financial obligations, maintain essential services, and respond to unforeseen challenges.
- **Improves Service Delivery:** Adequate funding is essential for providing high-quality services to the community.
- **Increases Public Trust:** Transparent and responsible financial management builds trust and confidence among the community members.
- **Facilitates Strategic Decision-Making:** A strong financial foundation provides the district with the flexibility to make informed decisions about service delivery, capital investments, and future planning.

### ELEMENT 3: COMMUNITY DEVELOPMENT

Community Development fosters a vibrant and engaged community by enhancing recreational facilities, organizing events, and promoting Spalding as a desirable destination. This element directly contributes to the quality of life for residents and strengthens the district's identity as a regional hub. It also supports economic development through increased tourism and community satisfaction.

- **Enhances Quality of Life:** By focusing on community development, the district can improve the overall quality of life for residents and visitors.
- **Fosters Community Engagement:** Engaging with the community is essential for understanding their needs and priorities, building trust, and ensuring that District services meet community expectations.
- **Promotes Economic Growth:** A vibrant community can attract new residents and businesses, contributing to the economic growth and stability of the region.
- **Strengthens Community Identity:** Community development initiatives can help to foster a strong sense of community identity and pride among residents.

### ELEMENT 4: ADMINISTRATIVE PRACTICE

Efficient administrative practices are the backbone of the district's operations. Streamlining processes such as recordkeeping, payroll, and public engagement ensures compliance with regulations, minimizes errors, and improves customer service. Modernized administrative systems and policies enable the district to operate smoothly and adapt to changing needs effectively.

- **Ensures Efficient and Effective Operations:** Strong administrative practices are essential for efficient and effective operations, including financial management, personnel management, and public records management.
- **Improves Transparency and Accountability:** Clear and consistent administrative practices enhance transparency and accountability, building trust with the community.
- **Reduces Risk:** Effective administrative practices can help to minimize risks and ensure compliance with all applicable laws and regulations.
- **Supports Service Delivery:** A well-managed administrative function provides the foundation for effective service delivery to the community.

### ELEMENT 5: REGIONAL COOPERATION & MUTUAL AID

Collaborating with regional partners and participating in mutual aid agreements are essential for enhancing emergency response capabilities and resource-sharing. Regional cooperation strengthens Spalding's ability to respond to disasters, secures additional expertise and equipment, and promotes strong relationships with neighboring agencies. This ensures the community is better protected and supported during emergencies and broader initiatives.

- **Enhances Emergency Response:** Strong regional cooperation and mutual aid agreements are critical for effective emergency response, such as during wildfires, floods, and other disasters.
- **Improves Resource Sharing:** Collaboration with other agencies allows the district to share resources, expertise, and best practices, improving efficiency and effectiveness.

- **Strengthens Regional Relationships:** Building strong relationships with other agencies and organizations fosters a collaborative and supportive environment within the region.
- **Improves Service Delivery:** By working together with other agencies, the district can better serve the needs of the community and improve the overall quality of life in the region.

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**GOALS, OBJECTIVES AND TASKS**

**ELEMENT 1: CAPITAL IMPROVEMENT PLANNING**

**Spalding Community Services District Strategic Plan 2025-2030**

Elements, Goals, Objectives, and Tasks

<b>ELEMENT 1 - CAPITAL IMPROVEMENT PLANNING</b>		<b>Roles &amp; Responsibilities</b>	<b>Begin</b>	<b>End</b>
<b>GOAL:</b>	<b>To maintain and improve the district’s infrastructure by completing near-term repairs, reviewing, and updating management plans, establishing Capital Improvement Plans, and building Capital Reserves.</b>			
<b>Objective 1.</b>	<b>Objective 1: Address Near-Term Priority Infrastructure Repairs - Lift Station #1</b>		<b>January 2025</b>	<b>December 2025</b>
<i>Tasks</i>	1. Complete an application and submit to the Clean Water State Revolving Fund, Initial Study and Mitigated Negative Declaration and Preliminary Design (30%).	General Manager & Operations Committee	January 2025	March 2025
	2. Lassen County Environmental Health Permitting & Grant Coordination, Procurement Package Development and Design (60%).		April 2025	June 2025
	3. Legal Opinion, Funding Agreements, Design for Construction (90%), Notices of Award, and Work Begins.	General Manager & Operations Committee	July 2025	September 2025
	4. Work Completed, Compliance Inspection, Reporting, and Post-Project Evaluation.		October 2025	December 2025
<b>Objective 2.</b>	<b>Develop Comprehensive Sewer System Management Plan.</b>		<b>January 2025</b>	<b>December 2025</b>
<i>Tasks</i>	1. Digitize System As-Builts and establish a basic GIS and database for tracking Sewer System Maintenance & Inspections, Sewer Connection Permits, and Service Calls.	Operations Committee, Wastewater Operator & General Manager	January 2025	July 2025
	2. Hire a qualified engineering consultant to finalize the Sewer System Management Plan (SSMP) & Sewer System Preventative Maintenance Plan incorporating the findings of the "Needs Assessment" and the Engineer's Inspection and data collected.		April 2025	July 2025
	3. Conduct a public workshop of the Operations Committee to present the draft SSMP and gather community input.	Operations Committee, Wastewater Operator & General Manager	July 2025	October 2025
	4. Finalize and adopt the SSMP by the Board of Directors.		July 2025	October 2025
<b>Objective 3.</b>	<b>Develop Sewer System Capital Improvement Plan (CIP)</b>		<b>January 2026</b>	<b>December 2026</b>
<i>Tasks</i>	1. Based on the finalized SSMP, develop a 5-year Sewer System CIP, prioritizing critical infrastructure repairs and replacements.	Operations Committee, Wastewater Operator, General Manager & Finance Committee	January 2026	April 2026
	2. Identify potential funding sources (grants, loans, fee adjustments) for CIP projects and develop a Resource Attainment Plan.		April 2026	July 2026
	3. Conduct a public workshop to present the draft Sewer System CIP and gather community input.	Operations Committee, Wastewater Operator, General Manager & Finance Committee	July 2026	October 2026
	4. Finalize and adopt the Sewer System CIP by the Board of Directors.		July 2026	October 2026

Spalding Community Services District Strategic Plan 2025-2030

Elements, Goals, Objectives, and Tasks

ELEMENT 1: CAPITAL IMPROVEMENT PLANNING (continued...)								
GOAL:	To maintain and improve the district's infrastructure by completing near-term repairs, reviewing, and updating management plans, establishing Capital Improvement Plans, and building Capital Reserves.			Roles & Responsibilities	Begin	End		
<b>Objective:</b>	<b>4.</b>	<b>Develop Fire Department Capital Improvement Plan (CIP).</b>				<b>January 2027</b>	<b>December 2027</b>	
<i>Tasks</i>	1.	Review the Spalding Volunteer Fire Department Standard Operating Procedures 2018 for current operations.				January 2027	April 2027	
	2.	Conduct a needs assessment of fire equipment, apparatus, and facilities.				January 2027	April 2027	
	3.	Identify potential funding sources (grants, impact fees, fundraising) and develop a Resource Attainment Plan.			Operations Committee, Fire Chief, General Manager & Finance Committee	January 2027	April 2027	
	4.	Develop a 5-year Fire Department CIP prioritizing critical needs.				April 2027	July 2027	
	5.	Conduct a public workshop to present the draft Fire Department CIP and gather community input.				July 2027	October 2027	
	6.	Finalize and adopt the Fire Department CIP by the Board of Directors.				July 2027	October 2027	
<b>Objective:</b>	<b>5.</b>	<b>Develop Recreation Department Capital Improvement Plan (CIP).</b>					<b>January 2028</b>	<b>December 2028</b>
<i>Tasks</i>	1.	Conduct a needs assessment of recreation facilities (marina, parks, etc.).					January 2028	April 2028
	2.	Explore potential recreational enhancements (trails, community gardens, etc.).			Recreation & Community Development Committee, General Manager & Finance Committee	January 2028	April 2028	
	3.	Identify potential funding sources (grants, user fees, partnerships).				January 2028	April 2028	
	4.	Develop a 5-year Recreation Department CIP prioritizing critical needs.				April 2028	July 2028	
	5.	Conduct a public workshop to present the draft Recreation Department CIP and gather community input.				July 2028	October 2028	
	6.	Finalize and adopt the Recreation Department CIP by the Board of Directors.				July 2028	October 2028	
<b>Objective:</b>	<b>6.</b>	<b>Establish Capital Reserve Funds.</b>					<b>April 2025</b>	<b>December 2030</b>
<i>Tasks</i>	1.	Review, revise, or develop a policy for allocating funds to dedicated capital reserve accounts for each department (Sewer, Fire, Recreation).			Finance Committee & General Manager	April 2025	July 2025	
	2.	Implement the policy and begin contributing to the reserve funds annually, beginning with the Sewer System.				July 2025	December 2030	



ELEMENT 2: FISCAL HEALTH

Spalding Community Services District Strategic Plan 2025-2030							
Elements, Goals, Objectives, and Tasks							
ELEMENT 2:	FISCAL HEALTH						
GOAL:	To improve the district’s fiscal status, by implementing standard operating procedures, securing grants, growing the budget, and satisfying audit recommendations.			Roles & Responsibilities	Begin	End	
<b>Objective:</b>	<b>1.</b>	<b>Develop a 5-Year Financial Plan and Enhance Financial Management Systems.</b>			<b>January 2025</b>	<b>July 2025</b>	
<i>Tasks</i>	1.	Conduct an evaluation of current financial management practices and software systems.			January 2025	April 2025	
	2.	Develop and propose a 5-Year Financial Plan addressing operational funding, reserves, and debt management.			Finance Committee & General Manager	April 2025	July 2025
	3.	Develop a Memorandum of Understanding with Lassen County Treasurer and Auditor-Controller’s office for satisfactory conditions for consolidating the district treasury back to Lassen County.				July 2025	October 2025
<b>Objective:</b>	<b>2.</b>	<b>Implement Standard Operating Procedures (SOPs) for Essential Finance Tasks</b>			<b>January 2025</b>	<b>July 2025</b>	
<i>Tasks</i>	1.	Review, update, develop and implement SOPs for all key district financial operations (e.g., Banking Administration, Accounts Payable, Accounts/Assessments Receivable, Payroll, Purchasing, etc.) as recommended in Audits and related to current operations.			Finance Committee, General Manager & Administrative Assistant	January 2025	April 2025
	2.	Conduct Administrative and Office staff training on all SOPs.				April 2025	July 2025
	3.	Regularly review and update SOPs as needed.				January 2025	December 2030
	4.	Implement the State of California Special District Uniform Accounting and Report Procedures as published and updated by the California State Controller’s Office as practicable and applicable to independent special districts and Spalding CSD operations.				January 2025	April 2025
<b>Objective:</b>	<b>3.</b>	<b>Enhance Grant-Seeking Efforts with priority for the Wastewater and Recreation Departments.</b>			<b>January 2025</b>	<b>December 2030</b>	
<i>Tasks</i>	1.	Leverage committee resources and/or contract with a grant-writing service for general or department specific purposes.			Finance Committee, General Manager & Administrative Assistant	January 2025	April 2025
	2.	Identify and research potential grant funding sources (federal, state, local).				January 2025	April 2025
	3.	Develop and submit grant applications for priority projects and programs.				January 2025	July 2025
	4.	Track grant progress and report on outcomes.				January 2025	July 2025

Spalding Community Services District Strategic Plan 2025-2030

Elements, Goals, Objectives, and Tasks

**ELEMENT 2: FISCAL HEALTH (continued...)**

		<b>Roles &amp; Responsibilities</b>	<b>Begin</b>	<b>End</b>
<b>Objective:</b>	<b>4. Fulfill and Explore Revenue Enhancement Opportunities and Cost-Saving Measures.</b>		<b>January 2025</b>	<b>December 2030</b>
<i>Tasks</i>	1. Implement the incremental rate increases established in the Cost-of-Service Analysis for Spalding Community Services District Sewer Rates effective 2023.		July 2025	December 2030
	2. Conduct a feasibility study for potential new revenue streams (e.g., impact fees, special assessments, partnerships) with priority and preference for activities that add needed services with minimal to no costs to residents.	Finance Committee, General Manager & Administrative Assistant	April 2025	July 2025
	3. Analyze the potential for cost-saving measures on a Department and District-wide basis.		April 2025	July 2025
	4. Utilize member services of Special District associated organizations to acquire affordable and adequate insurance for District Facilities and Workers Compensation.		April 2025	July 2025
<b>Objective</b>	<b>5. Improve Financial Reporting and Transparency.</b>		<b>January 2025</b>	<b>December 2030</b>
<i>Tasks</i>	1. Commission a Forensic Audit for Fiscal Years 2021-2022, 2022-2023, & 2023-2024.		January 2025	April 2025
	2. Complete the Fiscal Audit for Fiscal Years 2023-2024 & 2024-2025		April 2025	July 2025
	3. Enhance the District's website with financial information (annual budgets, audit reports, financial statements).	Finance Committee, General Manager & Administrative Assistant	January 2025	December 2030
	4. Complete regularly scheduled Public Hearing Budget Workshops during the first Regular Meeting of the Board of Directors of the new Fiscal Year.		January 2025	December 2030
	5. Establish Regular Financial Reporting Cycle as recommended in the State of California Special District Uniform Accounting and Report Procedures including Balance Sheet, Statement of Activities, Statement of Net Position and Budgetary Accounting reports.		April 2025	December 2030
	6. Evaluate the necessity, costs, and procedures for the potential adoption of an Enterprise Financial Management Information System as appropriate for Fund and Budgetary Accounting for Governmental Entities.		April 2025	July 2025

ELEMENT 3: COMMUNITY DEVELOPMENT

Spalding Community Services District Strategic Plan 2025-2030

Elements, Goals, Objectives, and Tasks

ELEMENT 3: COMMUNITY DEVELOPMENT		Roles & Responsibilities	Begin	End
<b>GOAL:</b>	<b>To bring the community closer together and make Spalding a safe and desirable place to live, visit, and recreate.</b>			
<b>Objective 1:</b>	<b>Enhance Community Engagement.</b>		<b>January 2025</b>	<b>July 2025</b>
<i>Tasks</i>	<ol style="list-style-type: none"> <li>1. Appoint standing committees - Operations, Finance and Recreation &amp; Community Development to assist administrative management staff in departmental planning efforts.</li> <li>2. Regularly maintain the District Website, Community Calendar, Community Newsletter, and official social media presence.</li> <li>3. Create an official Volunteer Program to support District activities.</li> <li>4. Conduct organized Community Surveys to gather feedback on District services and priorities.</li> </ol>	Recreation & Community Development, General Manager & Administrative Assistant	<ol style="list-style-type: none"> <li>1. January 2025</li> <li>1. January 2025</li> <li>1. January 2025</li> <li>1. April 2025</li> </ol>	<ol style="list-style-type: none"> <li>1. April 2025</li> <li>1. December 2030</li> <li>1. December 2030</li> <li>1. July 2025</li> </ol>
<b>Objective 2:</b>	<b>Improve Recreation Facilities and Programming.</b>		<b>January 2028</b>	<b>December 2028</b>
<i>Tasks</i>	<ol style="list-style-type: none"> <li>1. Develop Standard Operating Procedures for the Recreation Department Facilities.</li> <li>2. Explore new recreational programs and events for residents and visitors.</li> <li>3. Develop a 5-Year Recreation Master Plan with assistance from the Operations Committee and Finance Committee</li> <li>4. Conduct a public workshop to present the draft 5-Year Recreation Master Plan and gather community input.</li> <li>5. Implement any improvements to or restoration of the marina and other recreation facilities based on the Recreation Master Plan and CIP.</li> </ol>	Recreation & Community Development Committee, Operations Committee, General Manager & Administrative Assistant	<ol style="list-style-type: none"> <li>1. January 2025</li> <li>1. January 2028</li> <li>1. January 2028</li> <li>1. April 2028</li> <li>1. July 2028</li> </ol>	<ol style="list-style-type: none"> <li>1. July 2025</li> <li>1. April 2028</li> <li>1. April 2028</li> <li>1. July 2028</li> <li>1. December 2028</li> </ol>
<b>Objective 3:</b>	<b>Promote Community Safety</b>		<b>January 2025</b>	<b>December 2030</b>
<i>Tasks</i>	<ol style="list-style-type: none"> <li>1. Collaborate with the Operations Committee, Fire Department, and other agencies to enhance community safety through the development of Emergency Operations and Evacuation Plan.</li> <li>2. Continue implementation and expand upon Fire Prevention, Code Enforcement, and Community Outreach efforts - e.g., FireWise Certification and GreenWaste Program.</li> <li>3. Support local efforts to address community concerns (e.g., crime prevention and code enforcement).</li> </ol>	Recreation & Community Development, General Manager, Fire Chief & Administrative Assistant	<ol style="list-style-type: none"> <li>1. January 2025</li> <li>1. January 2025</li> <li>1. January 2025</li> </ol>	<ol style="list-style-type: none"> <li>1. December 2025</li> <li>1. December 2030</li> <li>1. December 2030</li> </ol>
<b>Objective 4:</b>	<b>Improve Partnerships with Local Business and Non-Profits</b>		<b>January 2025</b>	<b>December 2030</b>
<i>Tasks</i>	<ol style="list-style-type: none"> <li>1. Work with local businesses to stimulate tourism and support new Recreation Programming and Events.</li> <li>2. Work with non-profits to improve community and environmental health in the community of Spalding and the Eagle Lake watershed.</li> <li>3. Work with non-profits to provide assistance and support for at-risk or high need community members.</li> </ol>	Recreation & Community Development, General Manager, & Fire Chief	<ol style="list-style-type: none"> <li>1. January 2025</li> <li>1. January 2025</li> <li>1. January 2025</li> </ol>	<ol style="list-style-type: none"> <li>1. December 2030</li> <li>1. December 2030</li> <li>1. December 2030</li> </ol>

ELEMENT 4: ADMINISTRATIVE PRACTICE

Spalding Community Services District Strategic Plan 2025-2030 Elements, Goals, Objectives, and Tasks						
ELEMENT 4: ADMINISTRATIVE PRACTICE						
GOAL:	To improve the efficiency and rigor of the administrative functions of the district, emphasizing professionalism, expedience, transparency, and information security.			Roles & Responsibilities	Begin	End
<b>Objective</b>	<b>1. Administrative Standard Operating Procedures and Records Management Improvement</b>				<b>January 2025</b>	<b>July 2025</b>
<i>Tasks</i>	1. Establish Records Management and Retention Guidelines for digital records and hard copy files.		General Manager & Administrative Assistant		January 2025	July 2025
	2. Implement secure, redundant backup of vital records.				January 2025	July 2025
<b>Objective</b>	<b>2. Regularly Review and Update District Policies</b>				<b>January 2025</b>	<b>December 2025</b>
<i>Tasks</i>	1. Index, review, and update and securely publish the Record of Governance (Board Meeting Agendas, Minutes, and Materials) to the district website in a timely fashion.		Board of Directors, Operations Committee, & General Manager		January 2025	July 2025
	2. Review, update, index, and securely publish current District Ordinance, Resolutions, to the district website.				January 2025	July 2025
	3. Annually review District Ordinance and Policy to ensure compliance, currentness and consistency with current applicable laws and regulations.				January 2025	December 2030
	4. Maintain a current Policy Handbook for ease of reference and accessibility for the Board of Directors and Staff.				January 2025	December 2030
<b>Objective</b>	<b>3. Enhance Information Security.</b>				<b>January 2025</b>	<b>December 2026</b>
<i>Tasks</i>	1. Improve the cybersecurity posture of the district.		General Manager & Administrative Assistant		January 2025	December 2026
	2. Conduct a cybersecurity risk assessment.			January 2025	December 2026	
	3. Adopt a comprehensive cybersecurity program.			January 2025	December 2026	
	4. Implement security measures to protect sensitive data (e.g., employee records, financial data).			January 2025	December 2026	
	5. Train staff on cybersecurity best practices.			January 2025	December 2026	
	6. Regularly review and update security protocols.			January 2025	December 2026	
<b>Objective</b>	<b>4. Improve Public Records Request Management.</b>				<b>January 2025</b>	<b>July 2025</b>
<i>Tasks</i>	1. Develop and implement a robust system for managing, tracking, and fulfilling public records requests.		General Manager & Administrative Assistant		January 2025	July 2025
	2. Provide clear guidelines for Staff and the Public regarding public records request handling.				January 2025	July 2025
	3. Ensure timely and efficient response to public records requests.				January 2025	December 2030
<b>Objective</b>	<b>5. Strengthen Human Resources Practices</b>				<b>January 2025</b>	<b>December 2030</b>
<i>Tasks</i>	1. Review, update, index, and securely provide for the ease of reference and accessibility of current District Human Resources Policies to all new & existing Staff of the District.		General Manager & Administrative Assistant		January 2025	July 2025
	2. Develop and implement a comprehensive human resources plan, including financial resources forecasting, salary, wages & benefits planning to recruit and retain qualified staff as appropriate and necessary to perform essential services.			January 2025	July 2025	
	3. Utilize member services for CSDA and CRWA to better educate staff and leadership.			January 2025	December 2025	
	4. Annually review job descriptions for operational relevance and establish rigorous performance review and evaluation procedures and schedules that are explicitly tied to the job description and duties of the employees.			January 2025	December 2030	

ELEMENT 5: REGIONAL COOPERATION & MUTUAL AID

Spalding Community Services District Strategic Plan 2025-2030  
Elements, Goals, Objectives, and Tasks

ELEMENT 5: REGIONAL COOPERATION & MUTUAL AID		Roles & Responsibilities	Begin	End
<b>GOAL:</b>	<b>To improve the district’s position as a Regional Cooperator and form a resilient network of Mutual Aid.</b>			
<b>Objective</b>	<b>1. Implement LAFCO MSR Recommendations</b>		<b>January 2025</b>	<b>July 2025</b>
<i>Tasks</i>	1. Develop and implement an action plan to address all recommendations from the LAFCO Municipal Services Review.	General Manager & Administrative Assistant	January 2025	December 2025
	2. Monitor progress and report on implementation to the Board of Directors.		January 2025	December 2025
<b>Objective</b>	<b>2. Improve working relationship and coordination with Lassen County.</b>		<b>January 2025</b>	<b>December 2025</b>
<i>Tasks</i>	1. Meet with Lassen County Environmental Health, Planning & Building and Assessor's Office staff to address coordination efforts.	Board of Directors & General Manager	January 2025	April 2025
	2. Establish shared understanding of the roles and responsibilities of the district with respect to permitting, compliance and code enforcement.		April 2025	July 2025
	3. Develop a Memorandum of Understanding and Fiscal Agreement for potential Resource Attainment objectives, i.e., shared administration of grants.		July 2025	December 2025
	4. Support coordinated efforts with Lassen County Health and Human Services to provide services for high-need or at-risk community members including senior citizens, veterans, and people with disabilities.		January 2025	December 2030
<b>Objective</b>	<b>3. Secure Mutual Aid Agreements</b>		<b>January 2025</b>	<b>December 2025</b>
<i>Tasks</i>	1. Secure and maintain Cooperator Agreements with the United States Forest Service and CalFire and other Fire Protection Districts.	Board of Directors, General Manager & Fire Chief	January 2025	December 2025
	2. Secure and maintain Mutual Aid Agreements with other Community Services Districts and Sanitation Districts for Wastewater Services Technical Assistance and Emergency Response.		January 2025	December 2025

# TIMELINE

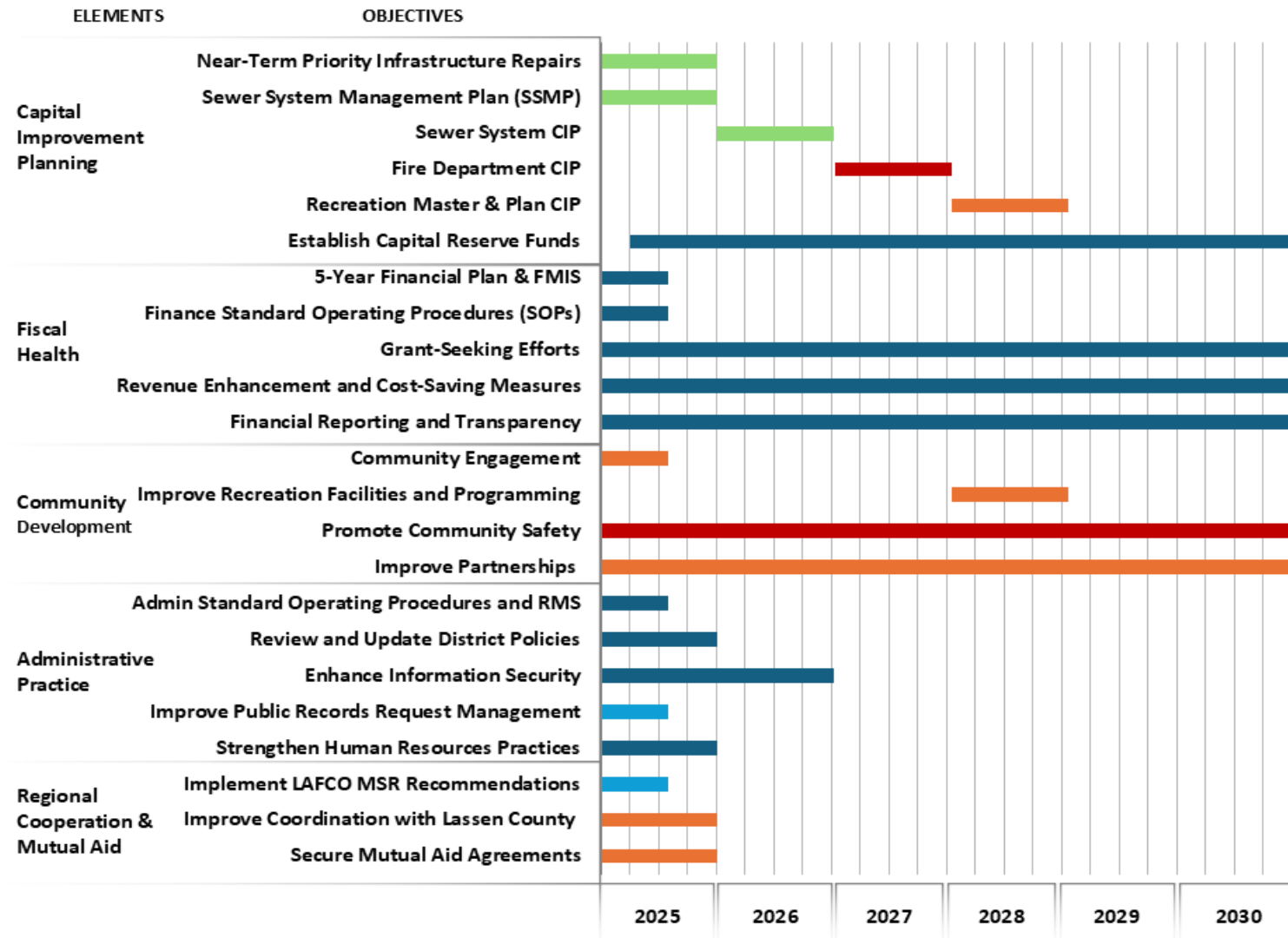


Figure 2 Spalding CSD Strategic Plan 2025-2030 Implementation Timeline

## INTEGRATION WITH OTHER PLANS

This Strategic Plan is implemented in conjunction and alongside existing plans or plans under development both internal and external.

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### INTERNAL PLANS

- **Fire Protection Standard Operating Procedures:** Coordination of fire protection emergency response protocols.
- **Sewer System Management Plan:** Overall management of the wastewater system.

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### EXTERNAL PLANS

- 1) **Lassen County General Plan and Eagle Lake Area Plan:** By state law Capital Improvement Plans developed as a result of implementation of the Spalding CSD Strategic Plan 2025-2030 must be compliant with the Lassen County General Plan and Eagle Lake Area Plan.
- 2) **Local Agency Formation Committee Municipal Service Review:** Lassen Local Agency Formation Committee (LAFCO) performs Municipal Service Reviews for Spalding CSD, which informs structure and organization, basic service levels, and best practices for district operations.

## PLAN REVIEW, UPDATE, AND REVISION

Strategic Plan Development, Review and Maintenance is the joint responsibility of the Board of Directors, Standing Committees, and the General Manager. The General Manager shall be the Strategic Plan Lead, presenting the Board of Directors with a completed Strategic Plan as compiled from information collected from the Board of Directors, Committees, Staff, and Community Engagement efforts.

### REVIEW SCHEDULE

The Board of Directors and Staff will coordinate to perform:

- 1) **Annual Review:** Focused on progress tracking.
- 2) **5-Year Update:** Public Workshops of the Standing Committees and Board of Directors shall inform Strategic Plan renewal.