

Joshua Basin Water District's 2025-2030

Strategic Plan





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Letter from the Board President and General Manager

Joshua Basin Water District's 2025 Strategic Plan provides a roadmap for effective water management, excellent service, and community relations. . . .

But it's more than that.

This document embodies the aspirations of our District, Board of Directors, and staff to serve as a vital community institution that leads with a positive vision, energy, and innovation. In this five-year plan, the District declares its intention to build on a 60-year legacy while facing current and future challenges with courage, compassion, integrity, and a drive to succeed.

The District was organized into a public agency in 1963 with the combination of several smaller systems. Today, the District serves more than 5,600 connections across a 96-square-mile service area. For the District's entire history, we have remained steadfast in the commitment to provide customers with the highest quality drinking water possible and to sustainably manage the groundwater that is our life source.

Now the District confronts new challenges that require ingenuity, dedication, and cooperation. Old infrastructure must be replaced, even as new facilities must be built and operated to address new water quality requirements imposed by the state. We must attract and retain a workforce of skilled and creative problem-solvers. And we must continue on a course of financial stability and strength. Navigating these competing needs demands bold leadership from all parts of a team united in vision and purpose.

Unincorporated Joshua Tree continues to evolve and grow as new residents and visitors combine with a population historically considered economically disadvantaged. We treasure — and wish to preserve — the historic values and creative spirit that give this rural community its unique identity. We envision the District playing a leading role in the efforts to extend a caring, compassionate "hand" to residents in need while also welcoming those who come here to experience and enjoy the peace and beauty of our high desert environment.

The District values strong connections with regional partners. We will seek to expand our business relationship and political bonds with the Mojave Water Agency, the regional provider of supplemental water, and will embrace emerging opportunities for cooperation with our neighbors. We will actively engage with San Bernardino County to ensure our voice is heard on questions of regional planning and services. And we will collaborate with other federal, state, regional, and local agencies on matters of mutual interest.

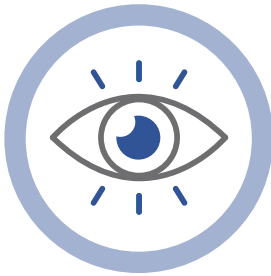
Our Strategic Plan for 2025 builds upon the 2019-2023 Strategic Plan's achievements while considering the rich history, current strengths and weaknesses, opportunities for, and threats to the District, our customers, and the region. We are pleased to provide you with this dynamic roadmap that guides the District's forward progress on all facets of our vital mission.

Thomas Floen
Thomas Floen
Board President

Sarah Johnson
Sarah Johnson
General Manager

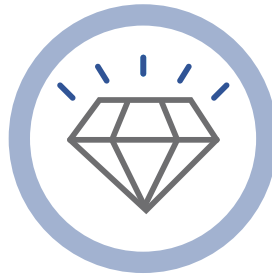
Mission, Vision, and Values

Joshua Basin Water District reaffirms the following:
Guiding Principles



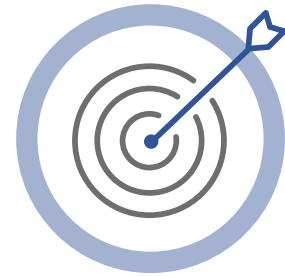
Vision

To achieve excellence in all District endeavors.



Values

The community of Joshua Tree has entrusted the Board of Directors and employees of Joshua Basin Water District with its most valuable natural resource, its groundwater.



Mission

To provide, protect, and maintain Joshua Tree's water – our vital community resource.

As stewards of the community water supply, we oversee this critical natural resource to ensure current and future water reliability. Dedicated to this purpose, we embrace our role as leaders in the community, the region and the water industry and are committed to demonstrating these important values:

Integrity

To consistently earn our customers' trust by prioritizing the needs of the community and doing the right thing for the right reason.

Transparency

To openly and honestly share information about our operations with the public.

Respect

To treat all those contacted in the course of business, with high esteem and regard.

Fiscal Responsibility

To manage all resources, whether revenues, assets, or water supply, in a conscientious and appropriate manner.

Accountability

To take responsibility for our decisions and actions in managing this essential resource.

The Strategic Planning Process

The Joshua Basin Water District 2025 Strategic Plan incorporates valuable insights from the Board of Directors, dedicated staff, and the community we are committed to serving. The Strategic Plan development process began in summer 2024 and included interviews and a survey of Board Members, Executive Leadership, staff from all levels of the organization, and the District’s Citizens Advisory Council (CAC). Interview responses were analyzed and organized into a Strengths, Weaknesses, Opportunities, and Threats (SWOT) framework that was reviewed and refined by the Board and Executive Leadership. Priorities and the strategic actions to address them were identified through a Board and Executive Leadership workshop and refined based on feedback from Board, staff, and community members. Current, ongoing projects identified in the 2019 Strategic Plan were also considered.

From this process emerged pillars that are essential for the District’s sustainable growth and effective service delivery. These pillars strategically align our strengths with opportunities while also addressing weaknesses and mitigating threats. Serving as a compass for decision-making and resource allocation, they guide our operations, allowing us to fulfill our mission.

The five pillars that represent the District’s major priorities are:

5

Strategic pillars that represent the District’s major priorities are:

- 1** Water Quality and Supply
- 2** Finance and Affordability
- 3** Facilities, Infrastructure, and Environmental Stewardship
- 4** People and Culture
- 5** External Relations and Influence

The Strategic Planning Process

Strategic Plan and Annual Business Plan



This Strategic Plan is the pinnacle planning document for the District. It establishes the foundation for all other organizational, operational, financial, and resource planning efforts, and is meant to remain relevant for at least five years.

The plan defines broad objectives related to each of the five strategic pillars as part of the Plan's structural component. In addition, specific objectives related to the broader ones are included as well.

The executive leadership team develops an annual business plan for JBWD. This business plan is shaped as a companion to the annual budget and provides the details and actions needed to achieve the strategic plan goals with guidance by the Board of Directors. Every action included in the business plan aims to advance the associated strategic objective and is expected to be completed within the plan year. The annual business plan assigns responsibility for the execution of each action, ensuring clarity and accountability. Changing conditions or new information may affect implementation plans, which are documented in status reports on the business plan.



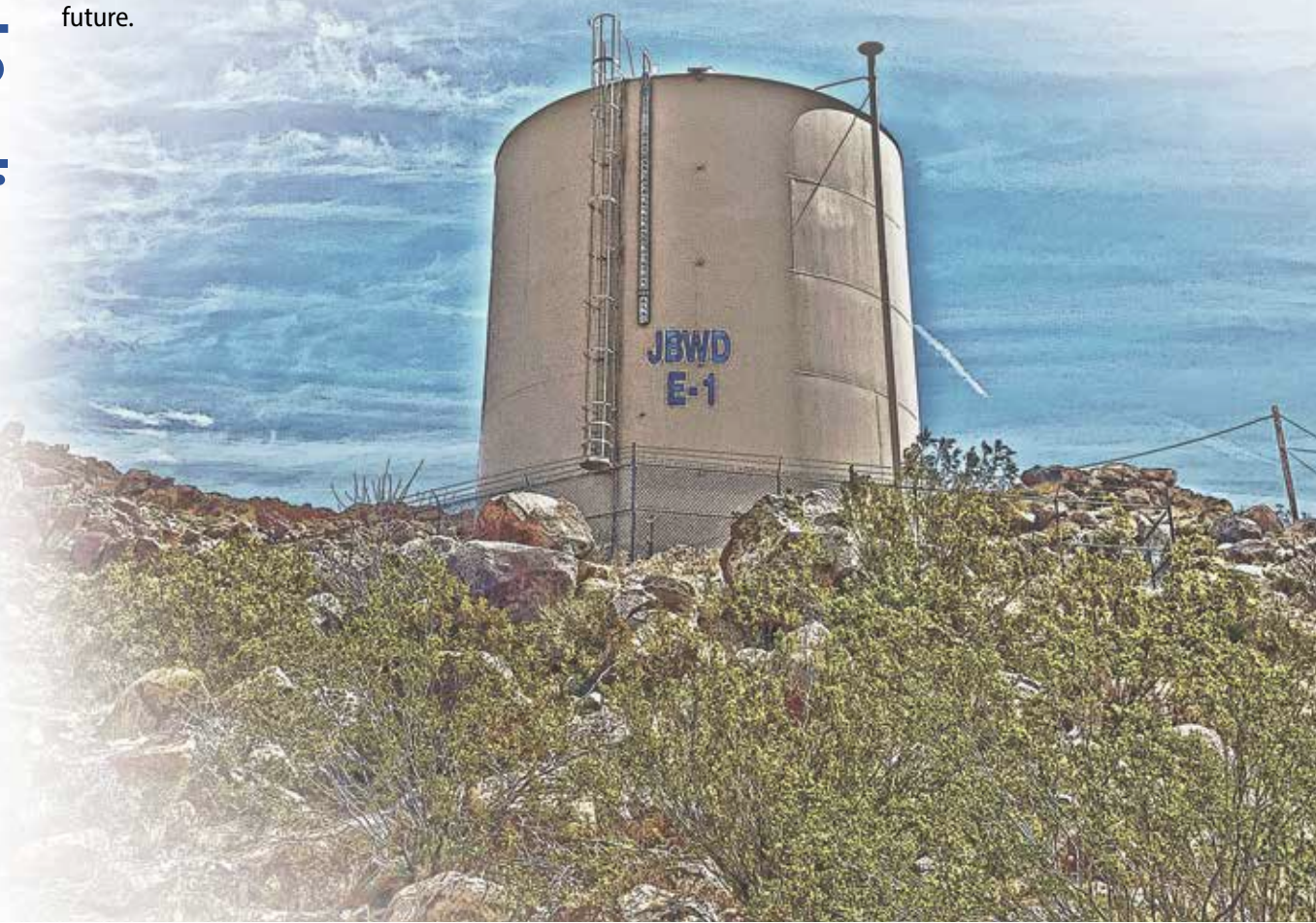
1 Water Supply and Quality

Joshua Basin Water District is committed to protecting and preserving our water resources long into the future.



Water supply and quality is the heart of Joshua Basin Water District's mission. Ensuring access to safe, clean water is essential for public health, our residents' well-being, and the protection of our environment. Reliable water service is critical for daily living and public safety, particularly in times of emergency, such as fires or earthquakes. The District is committed to responsibly managing its current water resources to ensure long-term sustainability while planning for future demands. To that end, the Plan includes implementing new drinking water treatment processes and safeguarding our groundwater supply. We actively seek alternative water supplies when necessary and remain dedicated to meeting and exceeding

water quality regulations. Our goal is to maintain the trust and confidence of our customers by consistently delivering high-quality water that supports a healthy life and appropriate growth in our Basin well into the future.



Objective 1.1

Plan for a robust long-term water supply to meet current and future customers' needs.

- Inventory groundwater resources and assess long-term sustainability under conditions of climate change, including recharge needs and opportunities for water capture.
- Assess alternative water sources for aquifer replenishment.
- Implement effective water conservation programs.

Objective 1.2

Implement cost-effective solutions to water quality challenges.

- Analyze technologies and identify the best option to comply with the current/anticipated hexavalent chromium drinking water regulation.
- Monitor and implement appropriate and feasible industry and government (USGS) research and best practices for water and wastewater systems and treatment.
- Increase investments in personnel and facilities to execute all necessary water quality, supply, and demand management activities.

Objective 1.3

Preserve water quality of critical groundwater sources.

- Monitor levels of all potentially hazardous constituents in groundwater with testing by an accredited laboratory.
- Partner with San Bernardino County and the Regional Water Quality Control Board regarding needed centralized wastewater treatment.

2

Finance and Affordability

Joshua Basin Water District is committed to keeping water affordable while staying financially responsible.



Responsible financial management and ensuring rate affordability and stability are key drivers of Joshua Basin Water District’s mission and plan. By carefully managing our financial resources and exploring new opportunities for cost-savings and revenue generation, we aim to balance the District’s needs with our customers’ ability to pay fair and manageable rates. Ensuring a secure financial foundation allows us to invest in critical infrastructure, meet emerging demands, and sustain operations for the long term. Our focus on fiscal responsibility helps us control risks, optimize assets, and maintain the quality of service on which our community relies.



Objective 2.1

Assess revenue requirements and update financial plans for establishing appropriate water rates and supplemental funding opportunities.

- Conduct periodic revenue and rate studies that assess customer affordability and equity considerations when needed.
- Consider alternatives to the policy of 100% pay-as-you-go funding for capital improvements.
- Review the current lien process and consider alternative policies and practices.
- Revise grant management policy.
- Pursue cost-effective grants for capital improvements such as hexavalent chromium treatment and pipeline replacement, and other opportunities as they arise.
- Explore opportunities for alternative sources of income to offset costs and labor burden through the innovative use of District assets, expanded debt, bonds and partnerships.

Objective 2.2

Manage financial reserves consistent with established policies for security, acceptable risk, and income objectives.

- Review risks and returns of the current strategy for investment of financial reserves and revise the investment policy as appropriate. Conduct cost risk analysis.

Objective 2.3

Continually seek cost savings and income opportunities in managing physical assets and resources.

- Identify innovative strategies to save money for energy efficiency in operations.
- Improve and maintain asset tracking and management systems.

3

Facilities, Infrastructure, and Environmental Stewardship

Joshua Basin Water District is committed to properly maintained facilities and infrastructure to ensure our reliability.



Joshua Basin Water District is committed to continuing its long history of diligently maintaining and improving its facilities and infrastructure and aspires to be a model for the region and water industry in this regard. Well-kept physical assets and a resilient system are crucial for supporting the District's core priorities, from staff well-being and retention to water reliability, quality, and efficiency. We will address emerging facilities and infrastructure needs with innovative, cost-effective solutions grounded in our commitment to environmental and community stewardship.



Objective 3.1

Review and update the Capital Improvement plan.

- Consider alternatives to the policy of 100% pay as you go funding for capital improvements.
- Continue data analysis of leaks and pipe breaks to prioritize pipe replacement and consider alternatives to accelerate the pace of pipe replacement.

Objective 3.2

Construct and operate facilities and equipment to meet compliance with all state and federal regulations.

- Plan for the construction and start-up operation of facilities for compliance with the hexavalent chromium regulation.
- Manage District fleet for cost effective compliance with state requirements.
- Monitor groundwater quality and set a triggering point to update wastewater strategy and develop preliminary plan for wastewater treatment.

Objective 3.3

Provide work facilities conducive to engagement, collaboration, harmony, productivity, and well-being.

- Continue to identify and evaluate ways to improve staff interaction and adequate workspace.
- Evaluate real property currently owned, potential acquisitions, and rental opportunities to address District needs, considering offsetting costs and labor burdens.

Objective 3.4

Exercise Environmental Stewardship.

- Create a Climate Resilience Plan for the District.
- Pursue opportunities for increasing operational resiliency, efficiencies, revenue, and cost savings.
- Minimize distribution system water loss.
- Further develop and implement a plan for renewable energy opportunities.
- Evaluate emerging and future facility and infrastructure needs, including buildings, grounds, and vehicles, with consideration of climate change and environmental protection.

4

People and Culture

Joshua Basin Water District is committed to engaging people to guide our vision and success in collaborative and innovative culture.

Skilled, engaged, nimble, efficient, and knowledgeable employees protect the continuity and stability of Joshua Basin Water District, our surrounding desert environment, and the customer experience. The District has identified strategic objectives that position it for long-term success by continuing to grow a welcoming and collaborative environment that attracts and retains dedicated leaders and team members.



Meet our Directors...



...and Staff



Objective 4.1

Promote organizational activities that successfully recruits, trains, develops and retains effective leaders and team members.

- Expand and enhance recruitment efforts with a focus on increased staff engagement and partnership with regional educational institutions to ensure a pipeline for needed talent to enter and thrive in the District.
- Enhance orientation, training, professional development, and team building for leadership and staff at all levels, utilizing both internal and external resources.
- Provide competitive compensation, active recognition, and foster a safe, supportive, and collaborative workplace culture.
- Implement a staffing plan that addresses capacity and alignment of Human Resources with District needs and priorities, addresses succession, and takes steps to capture and preserve institutional knowledge.
- Provide and ensure a safe workplace.

Objective 4.2

Review and update policies and implement process improvements and technology solutions to maximize effectiveness

- Develop and/or review and simplify standard policies and procedures to optimize staff understanding, compliance and workflows.
- Employ or evaluate robust technology systems and associated support for effective operations, governance, and decision-making.

Objective 4.3

Ensure exemplary governance and Board effectiveness.

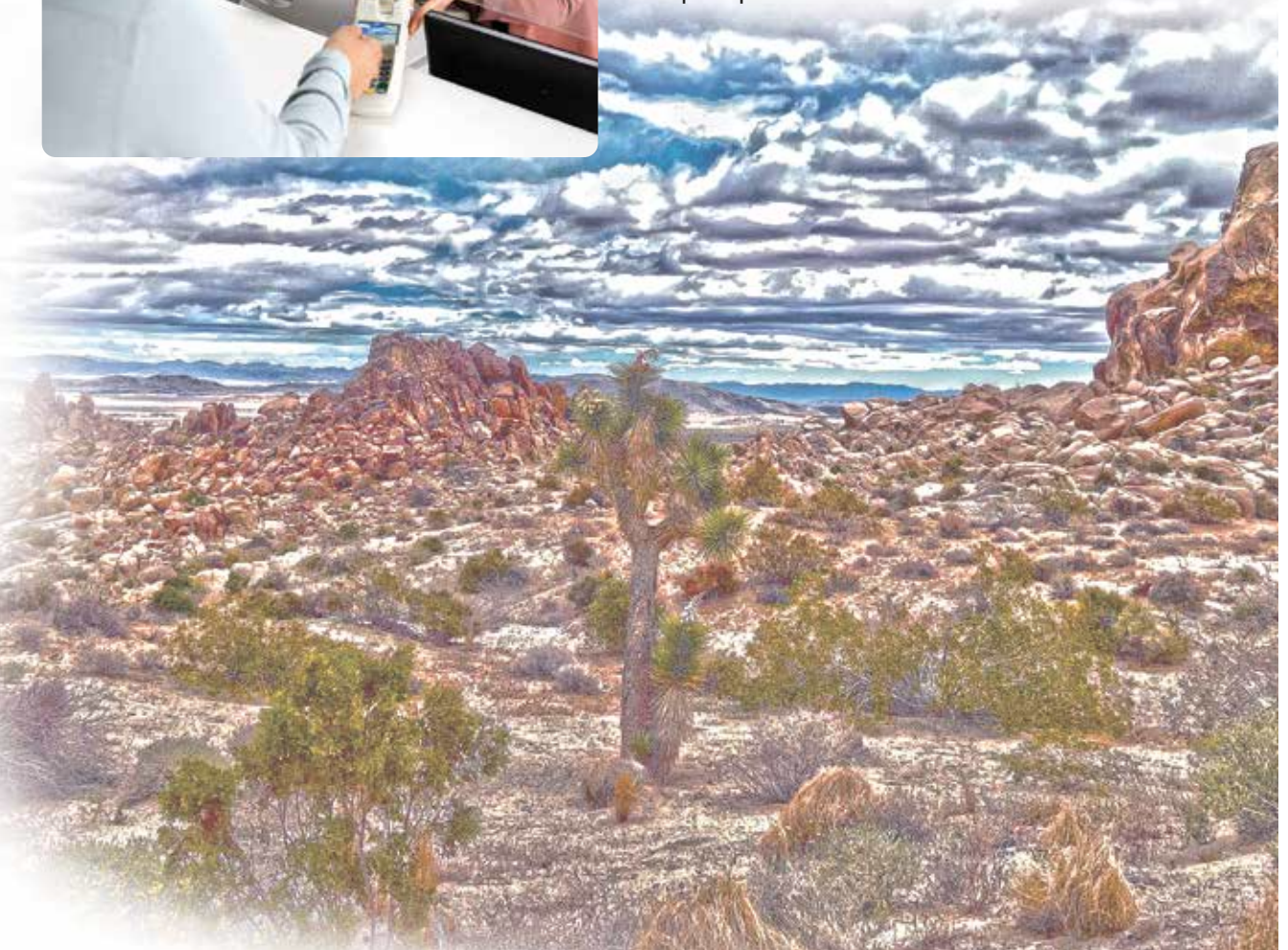
- Clarify Board of Directors role and responsibilities.
- Provide needed training, information and resources focused on:
 - Strategic Thinking and Oversight
 - Communication and Collaboration
 - Risk Management
 - Financial Stewardship
 - Building Relationships with Stakeholders
- Celebrate Board achievements

5 External Relations and Influence

Joshua Basin Water District is committed to strengthening relationships that shape our community's future in the Morongo Basin.



Joshua Basin Water District is dedicated to promoting responsible water stewardship within the community and ensuring that the needs of our small, rural desert community are well understood and responsively addressed. By building strong relationships and exercising leadership and influence with our customers, developers, and county, state, and federal officials, we will control the District's direction and help shape Joshua Tree's future.



Objective 5.1

Enhance customer trust, understanding, and positive perception of the District’s work protecting and providing water services.

- Measure the delivery of superior customer service.
- Support, update, and enhance community outreach, education, and messaging using innovative and diverse channels to reach both long-time and newer residents.
- Consider opportunities related to the District’s mission for addressing community needs beyond water service.

Objective 5.2

Develop mutually beneficial relationships, expand collaboration, and exercise strategic leadership with local, regional, county, state, national and international partners to meet challenges and opportunities.

- Seek judicial review of hexavalent chromium regulation.
- Advocate for differentiation in regulatory requirements for medium- and large-water suppliers.
- Increase direct engagement with San Bernardino County to improve financial support and services to the Joshua Tree area.
- Be an advocate for our community by expanding our reach through partnerships.
- Investigate and engage with community partners to promote welfare within the community.

Objective 5.3

Adopt a District position on development, and exercise leadership in shaping Joshua Tree’s future.

- Determine the capacity of water supply and how much growth can be supported.
- Develop a policy statement on equitable treatment of permanent residents, absentee owners of short-term rentals and “second” homes.



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