CHESTER PUBLIC UTILITY DISTRICT

Strategic Plan Workshop

Guide and Director Worksheet

Special Board Meeting · Tuesday, November 17, 2026 · 3:00 to 5:30 PM

Use with the Strategic Plan Discussion Draft

Please read the Strategic Plan, complete the Director Worksheet on your own, and bring both to the workshop.

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YOUR HOMEWORK, IN ORDER

Do these in this order. Check each one off. A little under two hours in all.

- ☐ 1. **Read this Guide, pages 2 to 7.** About 15 minutes.
- ☐ 2. **Read the Strategic Plan, pages 5 to 10: Chester in 2031, and Mission, vision, and values. Each section starts with a one-page "Why this section matters"; read that first.** About 15 minutes.
- ☐ 3. **Answer Worksheet Step 1 (page 9 of this Guide).** About 10 minutes.
- ☐ 4. **Read the Strategic Plan, pages 11 and 12: The District today. Then skim Appendix A, pages 32 to 41.** About 15 minutes.
- ☐ 5. **Answer Worksheet Step 2 (pages 10 to 12 of this Guide).** About 15 minutes.
- ☐ 6. **Read the Strategic Plan, pages 13 to 27: the proposed focus areas and goals. Just read. Steps 3 and 4 are done together at the meeting.** About 25 minutes.
- ☐ 7. **Bring this Guide, with your worksheet filled in, on November 17.**

Please don't discuss your answers with other directors before the meeting. Under the Brown Act, Board discussion happens only in the open meeting.

START HERE

Before you read anything else

This is the Board's plan. On November 17 you decide what the District will work on for the next five years, and the community will measure the District, and this Board, against what you decide.

What a strategic plan is

A strategic plan is the Board's promise to the community: **where the District is headed, what it will work on to get there, in what order, and how the public will know whether it is working.**

- **It starts with the future.** What will Chester need from the District in five years? Today's problems matter, but they are the starting line, not the plan.
- **It is not** a wish list, a budget, or a staff to-do list. The budget and the yearly work plan follow from it.
- **It is a first.** The District has never adopted one. In 2012 the Plumas Local Agency Formation Commission (LAFCo) recommended that the District develop a long-term plan for all services provided.

Why it matters to you as a director

The General Manager drafted the plan as a starting point. Once the Board adopts it, it belongs to the Board.

- **It drives decisions.** Every budget, rate decision, and staff report will point back to it.
- **It is reported in public.** Progress comes to the Board every quarter, in open session.
- **Others will use it to judge the District.** Ratepayers, auditors, grant agencies, and regulators will hold the District to it, and this Board along with it.
- **It is a living document.** The Board reviews it every year with the budget, and only the Board can change it.

> **What you put in the plan is what you will be held to. Set goals you would stand behind at a community meeting in 2031.**

How we're asking you to engage

- **Start with the future.** Think about Chester in 2031, not this month's problems.
- **Think as a trustee for the ratepayers,** not as a reviewer of staff's draft.
- **Say where you disagree.** The places where directors differ are the most useful part of the day.
- **It's fine not to know.** You don't see the District's day-to-day work, and no one expects you to. "Not sure" is an honest answer on the worksheet, and it tells staff where the Board needs more information.

AS YOU READ THE PLAN, ASK YOURSELF

- What would I regret leaving out?
- What would I be uncomfortable being judged on?
- What would a ratepayer expect to see that isn't here?

START HERE

Where this process comes from

This workshop follows recognized practices for public agencies and small water and sewer systems, adapted for a Board doing this for the first time.

Source	What it is	Where you'll see it
Plumas LAFCo Municipal Service Review (2012)	The County's local agency formation commission reviewed the District and recommended a long-term plan for all services.	**The reason for this plan**
Government Finance Officers Association (GFOA) Best Practice	The national standard for local government strategic plans: look at the environment, set goals tied to a vision, adopt the plan, then fund it and check it through the budget every year.	**The order of the plan, and the yearly review with the budget**
EPA and USDA Rural and Small Systems Guidebook (2016)	A guide from the U.S. Environmental Protection Agency (EPA) and the U.S. Department of Agriculture (USDA), written for small water and sewer systems. Each person rates the system on their own, then the group compares answers.	**Worksheet Step 2, adapted for directors**
SMART actions	A standard for writing actions: Specific, Measurable, Achievable, Relevant, and Time-bound.	**How staff rewrites each action after the workshop**
Similar California districts	Olympic Valley Public Service District (Strategic Plan 2025), Twain Harte Community Services District (2025), and Bear Valley Community Services District (2025 draft).	**Focus areas, action priorities, and progress tracking**

Sources: GFOA Best Practice: Establishment of Strategic Plans · USDA/EPA Rural and Small Systems Guidebook to Sustainable Utility Management (2016)

THE WORKSHOP

The day in five conversations

The workshop runs about 2½ hours, from 3:00 to 5:30 PM. After roll call and public comment, the General Manager and Kelley Cote present the Discussion Draft. Then the Board works through five conversations, starting with the future.

	Conversation and the questions it answers	Worksheet	Read in the plan
1	**The future, mission, vision, and values** *What will Chester need from the District in 2031? Do the mission, vision, and values say who we are, where we're going, and how we behave?*	**Step 1 (homework)**	Sections 1 and 2, pages 5 to 10
2	**Where we stand: a reality check** *How confident are we in each area, and which matter most? Which weak spots would stop us from reaching the vision?*	**Step 2 (homework)**	Section 3, pages 11 and 12, plus Appendix A
3	**Goals for the future** *What should the District be known for in 2031? Which goals matter most, and how many should the plan have?*	**Step 3 (at the table)**	Section 4, pages 13 to 27: the proposed goals
4	**The next 12 months** *If the District can finish only three things, which three?*	**Step 4 (at the table)**	Sections 4, 5, and 6, pages 13 to 29
5	**Recap** *Did we hear the Board's direction right?*	**No worksheet step**	Section 7: "How we'll track progress." Staff reads back each point of direction, and the Board confirms it and the reporting schedule.

IN CONVERSATION 3

Near the end of conversation 3, after every director has spoken and the Board has talked it over, each director places three initialed dots on the goals poster, one dot each on the three goals that matter most. These are your Step 3 answers, made visible on the wall. The Board Clerk records each director's dots in the minutes.

THE WORKSHOP

Who does what

Board Chair	Presides. Opens the meeting, runs public comment, and calls on each director in the go-arounds. Stops any discussion that moves into a closed-session topic.
General Manager (Bonnie Mullaney)	Opens the presentation of the Discussion Draft: why the District needs a plan, and the big picture. Answers questions of fact throughout.
Kelley Cote, Administrative Assistant	Presents how the plan is organized and what is in it. Then facilitates the five conversations: keeps time, keeps the discussion moving, stays neutral on the content, and reads back the direction given.
Staff	Records answers on the wall posters and keeps the parking lot.
Board Clerk	Roll call and minutes, including each director's dots and each point of direction the Board confirms. Collects the worksheets at the end of the meeting for posting with the minutes.

THE WORKSHOP

How your answers are sorted

Step 2 is a reality check on the plan: counts on a wall poster, no scores or averages.

1. **Go-around.** Each director reads out their "Not confident" areas (Step 2A) and their three stars (Step 2B).
2. **Count.** Staff tallies on the wall poster, for each of the 18 areas, how many directors are not confident and how many starred it.
3. **Sort.** Only "Not confident" counts; "Somewhat" counts as confident. Find the row below.
4. **Talk.** The Board discusses the "Focus now" areas first, then any area where directors split. That carries into the goals in conversation 3.

Where an area lands, and what happens to it

"Not confident"	Stars	It lands in	What happens next
3 to 5 directors	2 or more	**Focus now**	Becomes a top goal or first-year action. If no goal covers it, one is added.
3 to 5 directors	0 or 1	**Fix later**	Stays in the plan, in years two to five. Scheduled, not dropped.
0 to 2 directors	2 or more	**Protect**	Done well and the Board cares. Keep it funded and reported on. No new goal.
0 to 2 directors	0 or 1	**Keep it up**	Routine work. Nothing in the plan changes.
3 or more "Not sure"	any	**Need facts**	Nobody can judge it yet. Wins over Protect and Keep it up. Staff brings back facts first.

Example only

One real area, number 12, Billing and customer service, run through the rule four ways. The counts are invented; the Board's own counts on November 17 decide.

"Not confident"	Stars	It lands in	Because
4 of 5	3	**Focus now**	Most are not confident, and at least two starred it.
4 of 5	1	**Fix later**	Most are not confident, but only one starred it.
1 of 5	3	**Protect**	Most are confident, and three starred it.
1 of 5	0	**Keep it up**	Most are confident, and no one starred it.

THE BRIDGE TO THE GOALS

Before moving on: Which "Focus now" areas would stop us from reaching the vision? Does each one have a goal in the plan?

THE WORKSHOP

How we'll work

The three decisions

1. **Are the mission, vision, and values right?** Keep, revise, or replace each one. (Conversation 1)
2. **Are these the right goals for Chester's future, in the right order?** The forces in "Chester in 2031" and your answers in Step 2 help answer it. (Conversations 2 and 3)
3. **Keep nine goals, or combine them into fewer?** (Conversation 3)

Ground rules

1	**Talk about the idea, not the wording.** Staff will fix the words. Say "this goal should be about billing accuracy," not "change this sentence."
2	**Save specific questions for the parking lot.** Questions about a particular bill, repair, or employee go on the parking lot sheet. Staff will answer each one in writing after the workshop.
3	**Everyone answers first.** The Chair goes around the table so every director shares before open discussion begins.
4	**It's okay to disagree.** One person speaks at a time. Disagreement helps the Board find what matters most.
5	**No decisions today.** The Board gives direction by general agreement. No formal votes are taken on the plan at this workshop; adoption comes back on a later agenda.
6	**Some topics can only be named.** Labor talks, lawsuits, property deals, and individual employees can be named as priorities, but not discussed in detail. Those discussions belong in a properly noticed closed session. If talk moves there, the Chair will stop it and move on.

DIRECTOR WORKSHEET

Director Worksheet

Answer Steps 1 and 2 on your own before November 17 and bring this Guide with you. Steps 3 and 4 are filled in together at the meeting. There are no right answers. You are not expected to know the District's daily operations; answer from what you read in the plan and what you hear from ratepayers.

Your worksheet is a public record. The Board Clerk will collect it at the end of the meeting, and the worksheets will be posted on the District website with the minutes, along with the tally and the direction the Board confirms. Write what you think; the public will see it. Please don't name an employee or a specific customer on it.

Director name	Date completed

Before you start

☐	I did the homework on page 1 of this Guide, in order.
☐	I am keeping my answers to myself until the meeting. Under the Brown Act, Board discussion happens only in the open meeting.

Factual questions can go to the General Manager ahead of time.

DIRECTOR WORKSHEET

Step 1 The future, mission, vision, and values

HOMEWORK: BEFORE YOU ANSWER

Read the Strategic Plan, pages 5 to 10 (Chester in 2031, and Mission, vision, and values, each with its "Why this section matters" page). Then answer below.

Used in conversation 1

Looking ahead: what will Chester need from the District in 2031 that it doesn't get today?	
The current mission statement (Version B) should be:	Keep · Revise · Replace with Version C
Should the mission name each service the District provides?	Yes · No
Does the proposed vision describe where you want the District in five years?	Yes · Partly · No
If partly or no, what idea would you change?	
Do the six proposed values fit the District?	Yes · Mostly · No
Is a value missing, or is there one you would remove?	

DIRECTOR WORKSHEET

Step 2 How confident are you, and what matters most?

HOMEWORK: BEFORE YOU ANSWER

Read the Strategic Plan, pages 11 and 12 (The District today), and skim Appendix A, pages 32 to 41. Then answer below.

Used in conversation 2

YOUR TURN

1. **Step 2A:** For each area, read the one-line summary from the plan and circle how confident you are that the District has it under control. "Not sure" is an honest answer.
2. **Step 2B:** Then star the three areas that matter most to ratepayers right now, across all four groups. An area can matter a lot even if you are confident in it.

Operations

Area and what the plan says	2A: How confident are you? (circle one)	2B: Top 3 ☆
1. Drinking water quality Samples are clean, but summer bacteria results need a cause found, and the backflow program isn't adopted.	Confident Somewhat Not confident Not sure	☆
2. Enough water for the future Four wells; no long-term study of water supply, demand, or drought readiness.	Confident Somewhat Not confident Not sure	☆
3. Sewer and the wastewater permit The ponds can't meet the limits for releasing water to the lake; permit renewal pending; new plant by 2030.	Confident Somewhat Not confident Not sure	☆
4. Pipes, wells, tanks, and equipment Sewer pipes from the 1950s leak; meters are 20 to 60 years old; the alarm system and plow trucks are outdated.	Confident Somewhat Not confident Not sure	☆
5. Working efficiently No work order system or maintenance history; water lost to leaks can't be measured yet.	Confident Somewhat Not confident Not sure	☆
6. Emergencies, winter, and backup power Hazard plan adopted and mutual aid in place; no written emergency procedures.	Confident Somewhat Not confident Not sure	☆

Finance

Area and what the plan says	2A: How confident are you? (circle one)	2B: Top 3 ☆
7. Rates and revenue New rates adopted in 2026; sewer billing is below the rate study while customer coding is fixed.	Confident Somewhat Not confident Not sure	☆
8. Reserves, debt, and long-term obligations Reserves started in 2026 with no target in policy; the Fire fund still owes the sewer fund.	Confident Somewhat Not confident Not sure	☆
9. Grants and outside funding $19.08 million plant grant; sewer pipes need about $30 million and are only partly applied for.	Confident Somewhat Not confident Not sure	☆
10. Budget, financial reports, and financial systems Clean FY 2024-25 audit; year-end closing of the books not yet in place; outdated systems make reports slow, manual work.	Confident Somewhat Not confident Not sure	☆

Administration

Area and what the plan says	2A: How confident are you? (circle one)	2B: Top 3 ☆
11. Rules and records Policies reviewed, with final updates still under way; no master list of what is in force; the District Code has not been updated in decades.	Confident Somewhat Not confident Not sure	☆
12. Billing and customer service Winter bills are estimated; few ways to pay; billing reports are unreliable.	Confident Somewhat Not confident Not sure	☆
13. Customer concerns and complaints A complaint process exists but is outdated, with no report to the Board.	Confident Somewhat Not confident Not sure	☆
14. Staff and training Training plan in place; written procedures and a meaningful evaluation process still to build; labor agreement pending.	Confident Somewhat Not confident Not sure	☆
15. Modern tools and a culture of ownership Digital timecards and online forms in place; Teams underused; records still on paper.	Confident Somewhat Not confident Not sure	☆
16. Public trust and partners Board meetings redesigned; ratepayers mostly hear from the District through bills.	Confident Somewhat Not confident Not sure	☆

Community

Area and what the plan says	2A: How confident are you? (circle one)	2B: Top 3 ☆
17. Community and the lake New plant funding will protect the lake; little role in County planning.	Confident Somewhat Not confident Not sure	☆
18. Solid waste and streetlights Garbage contract renewed to 2030, with amendments coming; streetlights have no dedicated funding.	Confident Somewhat Not confident Not sure	☆

Is there anything not on this list the District should be working on?

DIRECTOR WORKSHEET

Step 3 Goals for the future

AT THE TABLE, NOT HOMEWORK

Read the proposed focus areas and goals (Strategic Plan, pages 13 to 27) at home, but leave this page blank. The Board fills it in together during conversation 3, after every director has spoken. The goals are proposals: they can be changed, combined, added, or dropped. If you have time at home, you may jot a first thought on your top three; we will finalize at the table.

Used in conversation 3

In 2031, what should the District be known for?	
The three goals that matter most to me:	
1.	
2.	
3.	
Looking ahead, what risk to the District worries you most?	
Should the plan have fewer goals?	Yes · No · Not sure
If yes, which goals belong together?	

DIRECTOR WORKSHEET

Step 4 The next 12 months

AT THE TABLE, NOT HOMEWORK

Leave this page blank at home. The Board fills it in together during conversation 4, using the proposed goals (pages 13 to 27), Dates we don't control (page 28), and Big-ticket needs (page 29).

Used in conversation 4

If the District could finish only three things in the next 12 months, they would be:
1.
2.
3.
One thing I would move to later:

Parking lot

Write down questions about a specific bill, repair, or project. They stay off the table on November 17 so the Board can focus on the plan. Staff will answer each one in writing after the workshop.

My questions for staff