

*mtg handouts*

## SAWPA Business Line Evaluation Template

Business Line: Inland Empire Brine Line

### Purpose and Objectives

#### Instructions

In three to five bulleted sentences provide a clear, concise, accurate statement of what objective(s) this business line is intended to accomplish. Objectives should reflect core purposes that the business line is undertaking. They must be feasible and consistent with the general expectations of the Commission. Objectives should be challenging but achievable. They should answer the questions: "What are we doing here?" and "Why are we doing it?"

✓ 1.	Improve water quality throughout the watershed, protect Orange County's water supply, and achieve salt balance by separately transporting salty wastewater to the ocean after treatment.
✓ 2.	Support use of local water supplies by disposing brine concentrate from desalting brackish groundwater, treated wastewater effluent for indirect potable reuse and cooling water used during power generation, and removing salty wastewater from a variety of brine generating industries.
3.	Maximize use of the line to increase salt removal and ensure financial sustainability of operations.
4.	Maintain compliance with salt management objectives throughout the watershed.
5.	Ensure the viability of the Brine Line from generation to generation.
6.	Optimize its use to the benefit of the watershed.
7.	Provide and maintain IEBL to protect downstream water quality, protect continued use of groundwater resources and support salt management
8.	Provide existing and future public agencies and private industry with a cost effective salinity management option
9.	Support long term watershed wide salinity balance
10.	Provide regional staffing support and venue for effectively managing the IEBL based on collaboration among regulators, downstream brine treatment operators, and IEBL customers
11.	Provide assimilative capacity in relevant groundwater basins for continued imported water recharge and increased recycled water use
12.	Provide disposal option for handling emergency discharges from local wastewater treatment plants
13.	Maximize efficiency in operations, maintenance, and energy consumption (CSF)
14.	Maintain sufficient funding for O&M through connection fees, and seek debt or grant funding for capital improvements when needed (CSF)
15.	Operate, maintain, and replace Brine Line facilities to remove salt and other elements from the watershed.
16.	Protect and enhance water quality in watershed

17.	Allow for high salts commercial industries to be located in the watershed with accompanying job opportunities
18.	Allow for brackish groundwater desalinization
19.	Allow for more use of recycled water
20.	Allow for certain energy production facilities
21.	Facilitate salt export from the watershed.
22.	Support the economic activity of saline-waste-producing industries in the watershed.
23.	Support recycling as a water supply resilience strategy.
24.	Protect surface and ground water quality.

## SAWPA Business Line Evaluation Template

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### Critical Success Factors (CSFs)

#### Instructions

List all the success factors that you believe are essential to the achievement of business line objectives. Each CSF must be devoted to a single issue. The maximum number of CSF's should be limited to eight. Be guided by the principle of "necessary and sufficient." Each CSF should be necessary to achieve the objectives, and the fulfillment of all CSF's will be sufficient to accomplish that goal.

1.	Well operated and maintained facilities, inspections, and compliance with regulations of system.
2.	Additional connections/customers and use of brine line. (PAT)
3.	Cost and rate management including relationship to OCSD.
4.	Consistent reporting on performance, costs, and challenges.
5.	Promote local employment by supporting IEBL needs from existing and future industry as well as public agencies.
6.	Legal and fiscal collaboration with dischargers, regulators, desalter operators, treatment operators, and other others.
7.	Commitment to efficiency through a watershed approach.
8.	Professional and highly-trained staff across planning, administration, engineering and field operations components of the business line.
9.	Long- and medium-term planning for capital and O&M changes in pursuit of efficiency and sufficient capacity.
10.	Pursue necessary funding and finance options to construct additional infrastructure or to maintain existing infrastructure.
11.	Investment in research, marketing and innovative planning for future brine disposal and other brine disposal options.
12.	Maintaining a reliable system by minimizing unplanned loss production days.
13.	Protect and preserve the useful life of IEBL through strategic maintenance/repair and capital improvements.
14.	Salt management objectives are being met throughout the watershed.
15.	The Brine Line is being used to ensure salt management objectives are being met.
16.	To the extent possible, the Brine Line is being used to promote economic development in the watershed.
17.	Unintended service interruptions are minimized, or eliminated.
18.	Routine maintenance is proactive and scheduled to minimize disruption to customers.
19.	Routine maintenance is scheduled to "level out" costs from year to year.
20.	Operations costs are "leveled out" from year to year.

21.	Increase industry awareness of brine disposal service and streamline the process for new customers to begin discharging.
22.	Increase operational efficiency by raising brine concentration and implementing process improvements.
23.	Plan, finance and construct additional infrastructure required to serve all areas of the watershed.
24.	Provide reliable and economical brine disposal service.
25.	Protect and preserve the useful life of Brine Line assets through strategic maintenance/repair and capital improvements.
26.	Protect the OCSD treatment plant from non-compliant dischargers and the environment through reduction of uncontrolled releases from the pipeline.
27.	Brine collection system adequate to capture the highly saline waste streams we produce, including industrial waste and brine from groundwater desalting and wastewater potable reuse.
28.	Disposal method and capacity.
29.	Regulatory compliance.
30.	Adequate financing.
31.	Municipal and industry awareness of the availability and value of the brine line.
32.	Customer focus in operating the brine line.
33.	Affordability of using the brine line.
34.	Reliability of the brine line system.

*Ensure that econ development agencies are fully informed re IEBL. -partners and others.*

# SAWPA Business Line Evaluation Template

Business Line: Inland Empire Brine Line

## Processes, Activities, and Tasks (PATs)

### Instructions

List the key processes and activities that must be done to meet the critical success factors. State each activity with an action verb-plus-object such as “engage soils consultant” or “conduct public meeting.” Ask the questions: (1) “Is this PAT necessary?” (2) “Can we judge whether it is being done well?” and (3) “Who owns this PAT?”

1.	Ensure appropriately trained staff or consulting support to conduct IEBL marketing efforts within and outside the watershed
2.	Conduct regular facilitated planning meetings with IEBL customers and regulators for all technical, financial and administrative processes
3.	Periodically update IEBL Business Plan
4.	Investigate and develop financing options for the protection or relocation of the IEBL, as needed, to address disposal capacity issues and provide reasonable and stable rates
5.	Implement a maintenance management system to reduce replacement and increase reliability
6.	Conduct necessary spill preventive measures as part of system maintenance practices
7.	Provide regular IEBL maintenance, inspection and oversight services
8.	Establish and educate IEBL users on sampling protocol as necessary to ensure consistent upstream and downstream brine constituent loadings
9.	Conduct and evaluate IEBL performance metrics and indicators on an annual basis
10.	Monitor salt objectives throughout the watershed
11.	Track use of the Brine Line vs purchased capacity
12.	Help capacity holders market their unused capacity in the Brine Line to industries that produce non-reclaimable waste (pharmaceutical companies, etc.)
13.	Track unintended service interruptions
14.	Ask customers if notification and scheduling of maintenance is satisfactory
15.	Track routine maintenance costs from year to year
16.	Engage OCS&D to determine forecasted operations costs
17.	Conduct a workshop with stakeholders to develop forecasted costs for operations and maintenance
18.	Identify stakeholders (redevelopment agencies, commercial realtors, etc.) and market the Brine Line to increase use.
19.	Develop web-based tools to facilitate discharge permit application process, permit management, and billing
20.	At least annually assess maintenance requirements and operational needs
21.	Automate system operations (a/v valve operation), data collection and use of remote sensing technology where appropriate.

22.	Grow demand for the Brine Line
23.	Assess and use tools to control risk – contract terms and conditions, a portfolio of insurance, Injury and Illness Prevention Plan, staff training.
24.	Set reasonable expectations and use notification procedures before, during, after planned activities
25.	Implement a prioritized repair and capital improvement program
26.	Establish and maintain repair and replacement reserve targets
27.	Run pretreatment program in close coordination with Agencies and in compliance with Program Documents
28.	At least annually update Overflow Emergency Response Plan and ensure Emergency Response resources are available during emergencies
29.	Update Sewer System Management Plan (SSMP) as required
30.	Implement and audit SSMP
31.	Follow reporting requirements
32.	Monitor, operate, and ensure brine line effective and efficient operations for long term
33.	Provide for high level of employee, and contract, operations and maintenance
34.	Track and report cost trends and results.
35.	Update rates annually striving for CPI like rate increases or less
36.	Provide for capital replacements in consistent manner.
37.	Rates to include annual replacement component.
38.	Report on brine line results annually including constituent loadings
39.	Have regular meetings and consistently share information with Brine Line customers
40.	Mechanism to efficiently address unusual conditions
41.	Plan, build and operate brine line system.
42.	Develop and implement policies for operation.
43.	Advocate for legislation and policies that support brine management and discharge.
44.	Maintain and administer contracts with OCSD and nurture the partnership.
45.	Continuously evaluate other export concepts and opportunities.
46.	Implement pretreatment and spill prevention and response programs.
47.	Ensure quality of infrastructure construction and adequacy of preventative and corrective maintenance and programmatic replacement.
48.	Adopt and implement rate structure and collect revenue.
49.	Market the IEBL to ensure waste streams are captured.
50.	Control brine line costs.
51.	Ensure costs are allocated according to benefits, including benefits to dischargers and to others.
52.	Identify management practices to minimize volume of non-recyclable brine.
53.	Provide brine disposal for potable reuse projects.
54.	Ensure IEBL is prepared to serve proposed groundwater desalters.
55.	Provide emergency alternative discharge capacity to wastewater generators to prevent spills.

## SAWPA Business Line Evaluation Template

Business Line: Roundtables

### Purpose and Objectives

#### Instructions

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1.	Provide a forum for a subset of watershed parties to workout solutions to problems, challenges, or improve the use of the watershed's resources.
2.	Core mission of SAWPA as per 1969 stipulated judgment.
3.	Helps ensure appropriate use of water resources in watershed in cost effective, fair manner for the benefit of all in the watershed.
4.	Reduces conflicts and potential interference in good water resource management.
5.	Facilitate conflict resolution of watershed issues whether they be among sub-region groups or upper/lower watershed groups.
6.	Develop objectives for diverse stakeholders creating sufficient value or reasons to participate in the roundtable group.
7.	Clearly define reasons for and benefits of participation within group and refine as group matures by learning to work together and build trust.
8.	Elimination of water-related lawsuits in the watershed.
9.	Elimination of protest letters amongst water agencies in the watershed.
10.	Meet groundwater quality regulatory requirements throughout the watershed.
11.	Reduce costs, where possible, through collaboration.
12.	Provide regional capacity and neutral venue for supporting multi-agency forum(s) to address the water resources challenges in the Santa Ana River Watershed.
13.	Facilitate conflict resolution through collaborative processes creating peace and understanding among parties.
14.	Through economies of scale, reduce costs to stakeholders in addressing water related issues through shared/joint funding to achieve mutual goals rather than going it alone.
15.	Become the watershed's bridge for building synergy between regulators and the regulated community.
16.	Assure conclusions of efforts are shared widely and incorporated in other efforts.
17.	Promote watershed thinking.
18.	Nurture and implement watershed-scale or multi-jurisdictional actions and projects.
19.	Replace conflict with collaboration.
20.	Put available local and regional funds to best use, including leveraging outside funds.

## SAWPA Business Line Evaluation Template

Business Line: Roundtables

### Critical Success Factors (CSFs)

#### Instructions

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1.	Fair and impartial setting to provide opportunity for conflict resolution or improvement.
2.	Administrative processes, timelines, at direction of group members with approval of Commission.
3.	Transparent communications of issues and resolutions for a particular set of related topics.
4.	Goals, scope for process, costs, and timelines are agreed upon and approved by Commission before initiating a roundtable group.
5.	Reduce, reorganize, eliminate, and/or confirm all current roundtables. (PAT)
6.	Periodic surveys of participants identify satisfaction with group objectives and progress towards meeting those expectations.
7.	Technology is used to efficiently operate and communicate among the stakeholders, make information readily available, and maintain an information library.
8.	Mapping tools are used to collect and present data, analyze, and show results.
9.	Work to achieve group consensus on and Implement action plans to achieve desired outcomes.
10.	Avoidance of water-related lawsuits in the watershed.
11.	Avoidance of water-related protest letters in the watershed.
12.	Groundwater meets the water quality regulatory requirements.
13.	Regular coordination and collaboration amongst water agencies in the watershed.
14.	Cost per agency is reduced through cost-sharing.
15.	Fully funded process.
16.	Maintain SAWPA's reputation and capacity as a watershed wide, neutral and trusted facilitator/ leader/administrator.
17.	Professional staff and facilities capable of providing facilitative, management, administrative and technical support to collaborative work efforts.
18.	Engagement of public agencies, non-profits and regulatory agencies in activities of Roundtable.
19.	Create linkages among stakeholders through collaboration and cooperation.
20.	Willingness among participants to suspend opportunistic ways for the greater good of the watershed.



21.	Ability to gather and evaluate data and effectively share data results with others.
22.	Engaged leaders and participants willing to bear the costs of the process.
23.	Education to provide a watershed-scale frame of reference and understanding of the system approach.
24.	Economic tools to understand the benefits of different aspects of water use and impacts.
25.	Empowerment of participants to be creative and to think regionally.
26.	A ready forum, mechanism, and technical and organizational capacity for interagency collaboration.
27.	Comprehension of shared goals.
28.	Trust and confidence that the process will be transparent, fair, and objective, and will be wrapped up when appropriate.
29.	Comprehensive plan that comprises accepted vision and metrics.

## SAWPA Business Line Evaluation Template

*Business Line:* Roundtables

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1.	Consensus work on an agreed upon scope with costs and timelines.
2.	Regular meetings. Active participation by group members.
3.	Reduce/eliminate inactive participation that can lead to second guessing after the fact.
4.	Consistent and regular reporting on progress and conclusions, as well as costs.
5.	Intelligent and cost effective use of time, data. Sophisticated reports and summary information.
6.	Report and utilize results of roundtable’s work. Leverage information for SAWPA and other stakeholders.
7.	Establish consensus on what the group objectives are for a given time period and what successful completion would be.
8.	Survey stakeholders on group results towards achievement of objectives mid-stream and near the end of the time period.
9.	Operate efficiently to maximize participation and make work product readily available
10.	Make information collected readily available to stakeholders
11.	Develop an annual work plan based on the group objectives and ensuring consistency with available resources
12.	Conduct workshop(s) to identify water-related concerns in the watershed.
13.	Collaborate on study(s) to find solution(s) to water-related concerns in the watershed.
14.	Track the implementation of identified solution(s) to water-related concerns in the watershed.
15.	Track groundwater quality throughout the watershed.
16.	Assure sufficiently trained staff with capacity and capability to conduct the Roundtable all administrative, accounting and communication functions.
17.	Preparation, discussion and approval of an annual budget by the Roundtable for recommendation to authorizing authority.
18.	Manage funding through dedicated, interest bearing accounts.
19.	Create a venue for regular meetings of Roundtable parties.
20.	Ability through a Roundtable administrator to hire effective consultant support as needed to meet objectives.
21.	Generate, evaluate, and present data necessary for policy or management decisions.
22.	Effectively present data analysis in a transparent and accessible way.

23.	Provide skilled facilitation, either in-house or by contract.
24.	Encourage stakeholders to take on leadership responsibilities in task forces.
25.	Provide project management and transparent accounting services to manage shared funds for joint projects and activities.
26.	Procure services on behalf of task forces.
27.	Produce video describing SAWPA's successes and capabilities in collaboration.
28.	Engage UCR to partner in developing economic tools.
29.	Keep the OWOW Plan up to date through frequent partner and stakeholder input to reflect a shared regional vision including goals and metrics.
30.	Hire, train, and retain qualified SAWPA staff with the skill set to manage collaborative processes, run meetings, manage conflict, and improve data visualization.
31.	Maintain and upgrade SAWPA facilities, including adding virtual meeting capability.
32.	Develop data protocols to improve regional and multiple party utilization of data generated in the watershed.

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Business Line: \_\_\_\_\_

Prepared by: \_\_\_\_\_

Date: \_\_\_\_\_

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