

Municipal Water District of Orange County Needs Assessment

MWDOC Executive Committee
November 21, 2024



PRESENTATION AGENDA

Purpose of Needs Assessment

Desired Outcomes

Process and Steps

Needs Assessment Recommendations

Discussion and Questions



Purpose of Needs Assessment



To better align the needs of MWD OC's departmental leadership and the senior executive management team to facilitate improved organizational performance and achieve the organization's strategic goals and objectives.



HR and
Administration



Water Use
Efficiency



WEROC



Government
Affairs



Public
Affairs



MET
Issues



Eng. &
Planning



Finance
and IT



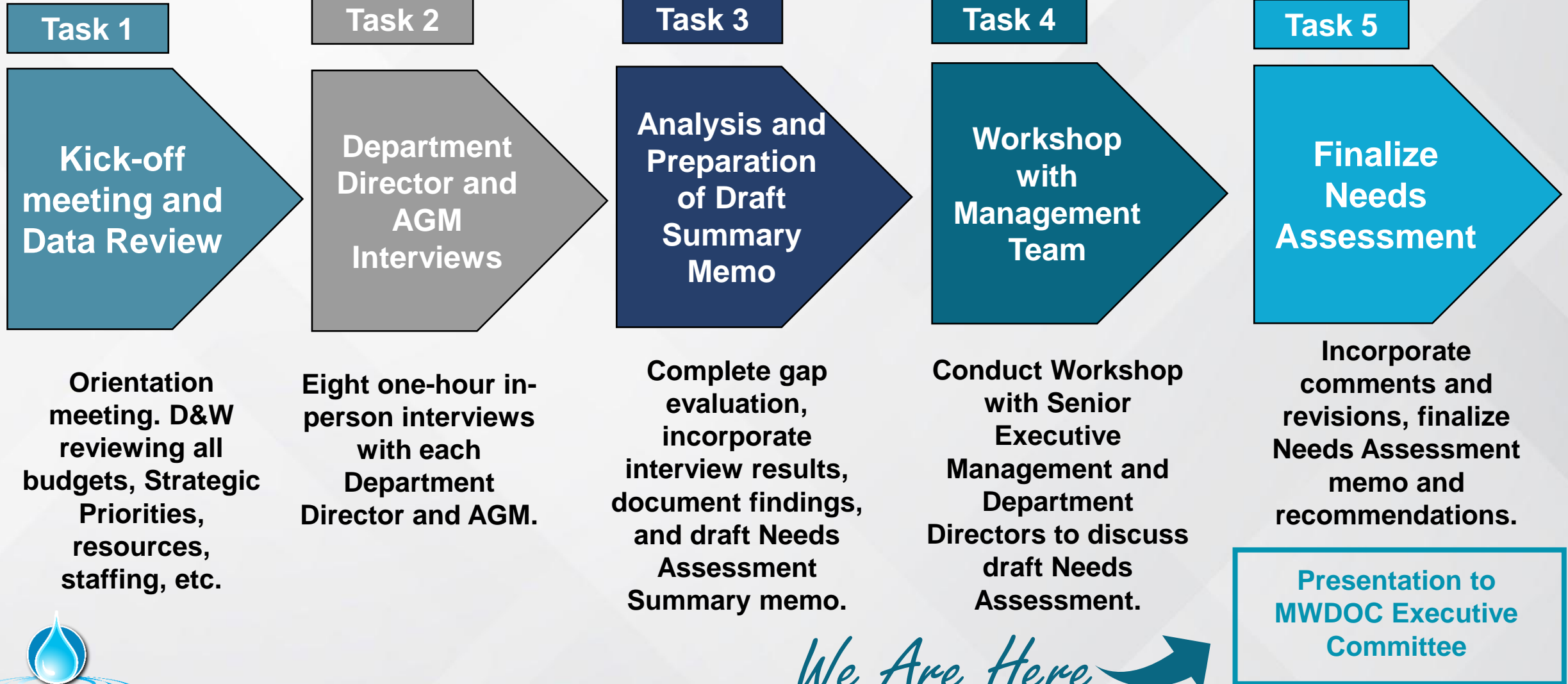
Desired Outcomes



- Obtain **feedback from each department** that can be considered by the senior Executive Management team to:
 - Help **respond to the strategic direction** of the organization.
 - Ensure **departmental resources and staffing needs** are met now and in the future.
- Provide information that can help **form program development, budgeting, and succession planning** decisions.
- Foster a **culture of continuous improvement and trust** among the Department Directors and the senior Executive Management team.



Needs Assessment Process and Steps





Interviews

- Eight Department Director interviews plus AGM and Exec. Assistant to GM/District Secretary.
- Questions provided in advance.
- Conducted on June 25 and July 2.
- Prepared detailed report-out notes.
- Circulated notes for each Department Director's review and incorporated input.

Question Topic Areas



Needs Assessment Results



- Developed a total of 15 recommendations in five areas.
- Recommendations based upon:
 - Interviews
 - Research
 - Information gathered from Senior Executive Management team and Human Resources.

Assessment scope includes process and service improvements, not recommendations for organizational changes



Overview

The focus of this section was to learn from the Department Directors and AGM if they have the resources required to:

- Implement the Strategic Priorities adopted by the Board.
- Support core day-to-day responsibilities.

Resources can be consultants, technology support, business system improvements, staffing, or a combination thereof.

Resource Needs



Recommendations

Resource Needs



GIS System and Analyst Support

- Critical need for MWD OC.
- Fundamental data transfer, management and communication with member agencies and MWD.
- Application for three to four departments.
- Need GIS system and Analyst to support.



Recommendations:

- 1. Conduct Internal and External GIS Needs Assessment.*
- 2. Prepare business case, review with member agencies, bring to Board for consideration.*



Better Contract Administration Processes and Support

- Improved support for contract administration and procurement – raised by four departments.
- Updated policies and procedures (Contract Manual).
- Clear process ownership and division of responsibilities.



Recommendations:

- 1. Conduct comprehensive process review (all departments, Senior Executive Management, Ex. Asst. to GM/ District Secretary).*
- 2. Assign contracts administration function to specific employee (part-time assignment for existing employee).*



Recommendations

Resource Needs



Staffing Needs – Shared Service Program and Succession

- Need accounting support for Shared Services, will allow other staff to get to essential duties.
- Need to temporary positions for overlap with pending retirees (3 to 6 months) to receive training.
 - Department Directors and other critical positions.
 - Internal and external candidates.



Recommendations:

1. *Retain Accounting Technician (in progress).*
2. *Develop Succession Plan staffing overlap policy for Board consideration; implement positions as needed.*



Recommendations

Resource Needs



Consultant Resources

- Specific needs identified by four departments:
 - Engineering & Planning
 - Water Use Efficiency
 - HR & Administration
 - Finance & IT
- Consultant needs align with adopted Strategic Priorities and delivery of Shared Services.
- Some consultant resources already retained.



Recommendation:

1. *Continue to develop business case based on Strategic Priorities and Shared Service needs and take to Board for consideration and/or incorporate into budget.*



Overview

Management Support



Feedback from the Department Directors and suggestions for consideration by the Senior Executive Management team in four areas:

- Communications
- Board interface and support
- Management team collaboration
- General organizational support



Regular and More Structured One-on-One meetings

- Regular meetings with direct reports to focus on information sharing, decisions and direction, status updates and pending Board items.
- Need unscheduled meeting availability when urgent issues arise.



Recommendations:

- 1. Regularly scheduled meetings with all Department Directors.*
- 2. Pre-prepared list or agenda to guide meeting and “manage up.”*
- 3. Senior executives to prioritize urgent ad hoc meetings with Department Directors.*



Recommendations

Management Support



More Timely and Frequent Group Communications

- Share important items on internal issues, Board-related matters, member agency issues, or MWD issues.
- Need to be timely so directors can inform staff.



Recommendations:

- 1. Regular updates on newsworthy items for Department Directors – text, email.*
- 2. Consider additional “all staff” communications.*



Improve Effectiveness of Management Group Meetings

- Restructure to improve collaboration and communications opportunities, better coordinate the advance scheduling and preparation of Board and Committee items.



Recommendations:

- 1. Department Directors to suggest agenda items in advance.*
- 2. Agenda restructuring and "Advanced Calendar" review (also covered under Intra-departmental Collaboration).*



Recommendations

Management Support



All Staff Meeting Engagement

- Attendance should not be optional.
- Open discussion and updates on Board actions, staffing changes, HR activities.
- Teambuilding – employee accomplishments, birthdays, anniversaries, recognitions.



Recommendation:

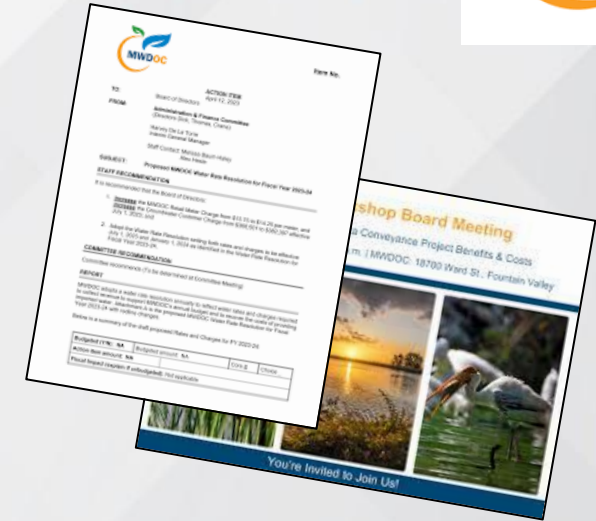
1. *Mandatory attendance of staff and Department Directors (with limited exception) to ensure better communications and facilitation of improved relationships among staff.*





Improve Collaboration on Preparing High Priority Board and Committee Items

- Better coordinate Department Directors' and Senior Executive Management team's preparation of high priority items.



Recommendations:

1. *Items prepared and submitted well in advance for Senior Executive Management review and to provide time for two-way collaboration (adhere to "Advanced Calendar").*
2. *Ensure consensus, acceptance, and support for the final product or consider deferring.*



Overview

MWDOC's Services



This portion of the Needs Assessment was designed for the Department Directors and the AGM to:

- Share ideas on additional activities or services the departments should undertake.
- Identify future initiatives for MWDOC to consider to improve its effectiveness.



Recommendations

MWDOC's Services



- Member agency service enhancement suggestions described in the Needs Assessment memorandum.



Eng. & Planning



Water Use Efficiency



Finance and IT



Public Affairs



Gov. Affairs



EM/
WEROC



MET Issues

OC Water Reliability Study Update.

Member Agency Business Planning Process.

Financial Services Member Agency Coordination.

Media Kit on Water Rates.
Better Collaboration with OCWD on Public Affairs Programs and Outreach.

Active Engagement Through Enhanced Event Sponsorship.

WEROC Program Awareness.
Shared Services Program for Operator Training.

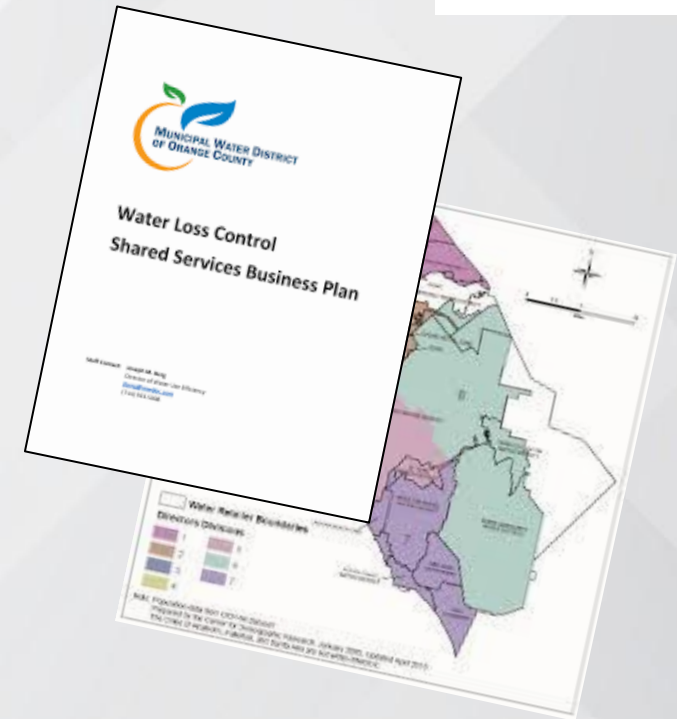
Mechanisms to Improve Member Agency Input and Information Sharing on MWD Issues.





Establish Member Agency Business Planning Process

- Enhancement to Shared Services program.
- Open forum for MWDOC and member agencies to share and vet project and program proposals and existing program revisions.
- Analyze and apply resources to develop program proposal concepts and “business case,” and seek member agency then Board support.



Recommendation:

1. *Develop expanded MWDOC Business Planning Process further and seek member agency and Board support.*



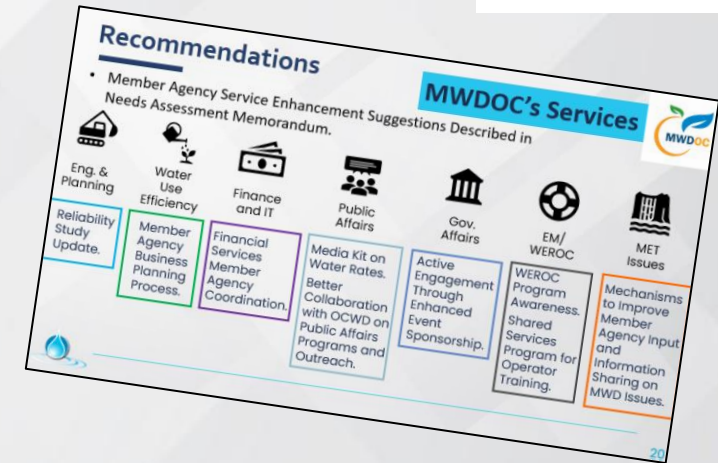
Recommendations

MWDOC's Services



Evaluate and Advance Service Enhancement Suggestions from Departments

- All suggestions are constructive, will enhance services, and clearly fall within MWDOC's Strategic Priorities and role.



Recommendations:

1. Consider immediate implementation of Service Enhancement Suggestions that require no or minimal additional resources.
2. Develop the scope, costs, and benefits for other suggestions, vet among the management team and if deemed feasible, bring to the MWDOC Board for consideration.



Recommendations

MWDOC's Services



Implement Additional Staff and Executive Level Collaboration with OCWD

- Member agencies clearly want OCWD and MWDOC to collaborate and coordinate.
- Build on Service Enhancement suggestions.
- Will reflect positively on both agencies.



Recommendations:

1. *Engage in regular management staff-to-staff coordination meetings with OCWD to focus on shared services, resources, improved coordination, joint outreach, and ways to reduce costs.*
2. *Develop recommendations at staff level and jointly bring to member agencies to garner support and to the Boards for consideration.*



Overview

Shared Resources / Inter-departmental Collaboration



This portion of the Needs Assessment focused on identifying ways to improve resource sharing and collaboration among departments:

- MWD OC needs to optimize its limited staff resources.
- Inter-departmental support is critical – “internal customers.”
- Sharing of expertise improves work product quality, services and outcomes.



Recommendations

Shared Resources / Inter-departmental Collaboration



Increased Inter-departmental Coordination and Support Activities

- Applies to departments with complementary responsibilities and needs.
- Goals:
 - Optimize limited resource deployment, assist where resources are available, and share subject matter expertise.
 - Ensure consistently high-quality products and services from MWD OC.
- Regular coordination is on-going in several areas:
 - HR & Administration and Emergency Management.
 - Engineering & Planning and Emergency Management.
 - Governmental Affairs and Emergency Management.



Recommendations

Shared Resources / Inter-departmental Collaboration



Increased Inter-departmental Coordination and Support Activities (cont'd.)

- Example groups with shared resources/expertise recommended for additional inter-departmental collaboration:
 - Public Affairs, WUE, Government Affairs – shared resources.
 - MWD Policy & Issues, Engineering & Planning – shared expertise.



Recommendations:

- 1. Establish inter-departmental groups and conduct regular meetings.*
- 2. Circulate open agenda to all participants in advance.*
- 3. Include Department Directors (decision makers) and designated staff.*
- 4. Add other departments, as-needed.*



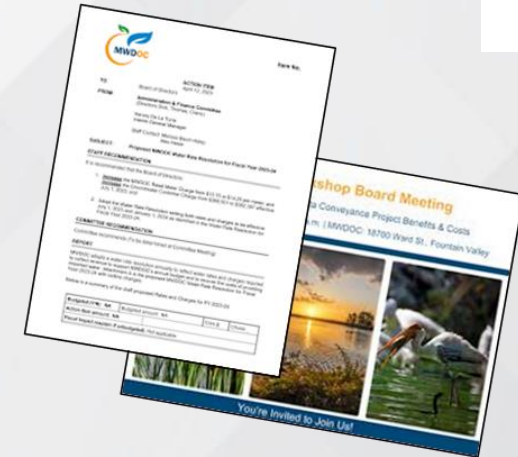
Recommendations

Shared Resources / Inter-departmental Collaboration



Improved Administrative Processes for Committee and Board Items

- Improve process for delivery of Board items.
- Reduces last-minute stress and increases development and review time and quality.



Recommendations:

1. *Detailed two- to three-month "Advanced Calendar" for all Board and Committee items including: action/information, lead director, inclusion of presentation, submittal, review and posting deadlines. (In progress)*
2. *Prepared and kept by Exec. Assist to GM/ District Secretary*



Overview

Staff Development and Succession



- Department Directors and AGM were asked to identify individuals in MWD OC with growth potential, and leadership capabilities.
- Twelve individuals in MWD OC identified for additional skill, supervisorial or management training in the following departments:
 - Engineering & Planning
 - MWD Issues & Policy
 - Public Affairs
 - Water Use Efficiency
 - Finance & Information Technology
 - Emergency Management
- Department Directors also asked about training and staff development needs for their departments.



Individuals identified not evaluated as part of this process



Recommendations

Staff Development and Succession



Staff development and Training

- Recommendation for a Succession Plan staffing overlap policy (previously noted under Resource Needs).
- Directors identified no specific gaps in training needs for staff as provided through HR & Administration.



Recommendations:

1. *Secure consultant and implement Executive Coaching program to assist members of management team (In-progress).*
2. *Implement new performance evaluation system to better document performance, track goals and get input from multiple reviewers (In-progress).*



DISCUSSION AND QUESTIONS



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