

Technical Memorandum 1: Purpose, Goals, and Objectives

Wholesale Water Management and Reliability Study

PREPARED FOR
SAN JUAN WATER DISTRICT



PREPARED BY
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**San Juan Water District
Wholesale Water Management and Reliability Study**

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INTRODUCTION

This Technical Memorandum (TM) is the first of a series of memoranda that will look to improve management of surface water and groundwater resources within the San Juan Water District's (District) wholesale service area, and potentially outside the District's current service area. This TM reflects input of District staff, the District Water Supply and Reliability Committee, and comments from stakeholders and interested members of the public during the Kickoff meeting for the District's Wholesale Water Management and Reliability Study (Study) on February 2, 2016. This TM sets the direction for the broader Study process by defining the purpose, goals, objectives, and planning constraints as follows:

- The purpose creates the conceptual planning framework for the Study to follow.
- The goal represents the desired "end state" of activities, and supports the defined study purpose. The Study goal is the foundation of the entire planning process.
- Objectives provide additional details on how the District's Study goal will be achieved and serve as a means of measuring success in achieving the goal.
- Planning constraints provide guidance on how the Study will be developed and evaluation conducted. It is important that these are consistent with the goals and objectives of the Study, as well as with good planning principles.

The TM also describes the process and schedule, and roles and responsibilities for conducting the Study.

STUDY PURPOSE, GOALS, & OBJECTIVES

This section describes the District's Study purpose, goals, and objectives.

Purpose

The purpose of the Study is to develop a short, prioritized list of water management options to improve water supply reliability, and a scope for the next phase of work (a more detailed feasibility study).

Study Goal

The Study goal is to improve management of surface water and groundwater resources within the District's wholesale service area, and potentially outside the District's current service area, through collaboration, consolidations, or other actions improve its water supply reliability.

Objectives

The three objectives of this Study are as follows:

1. Increase water supply reliability to the District's retail customers and Wholesale Customer Agencies during dry years by integrating surface water and groundwater storage.
2. Perfect the beneficial use of the District's water rights, contractual entitlements, and facilities.
3. Provide long-term financial benefits to our ratepayers, and provide regional and statewide benefits.

PLANNING CONSTRAINTS

The following planning constraints provide guidance on how the Study will be developed and evaluations conducted. Planning constraints are necessary to aid in development and efficient screening of proposed water management options:

- Consider the full range of options within district maximum allowable authority.
- Maintain and improve current water supply reliability to Wholesale Customer Agencies.
- Maintain consistency with new and emerging regulations, such as the Sustainable Groundwater Management Act.
- Maximize potential financial assistance for implementation.

STUDY PROCESS & SCHEDULE

Study process and schedule is illustrated in Figure 1. The Study process reflects a streamlined approach, where incremental findings from discrete tasks are documented in TMs. Development of Study goal, objectives, and planning constraints is followed by these activities:

- Collection and review of existing information
- Development of screening criteria and metrics
- Identification, preliminary evaluation, and screening of water management options
- Refined evaluation, and prioritization of selected water management options
- Development of detailed scope for next phase of Study

- Development of recommendations and Study Final Report

Figure 1 also highlights the various Study meetings with District staff, the District Water Supply and Reliability Committee, the District Board, the Wholesale Customer Agencies, and the District Board and Wholesale Customer Agency Boards.

STUDY ROLES AND RESPONSIBILITIES

Table 1 is the RACI responsibility matrix for the Study. The matrix defines the multiple roles and responsibilities for the various parties involved in developing and conducting the Study. It also helps to track accountability, and improves the value of Study meetings. RACI stands for **R**esponsible, **A**ccountable, **C**onsulted, and **I**nformed:

- **A**ccountability describes where the buck stops, who is held accountable
- **R**esponsibility describes where the work is done, who is responsible for carrying out a task
- **C**onsulted are the critical people who need to contribute prior to completing the activity
- **I**nformed indicates that it is less critical for this person to be involved but they need to be updated and informed about the outcome of the activity

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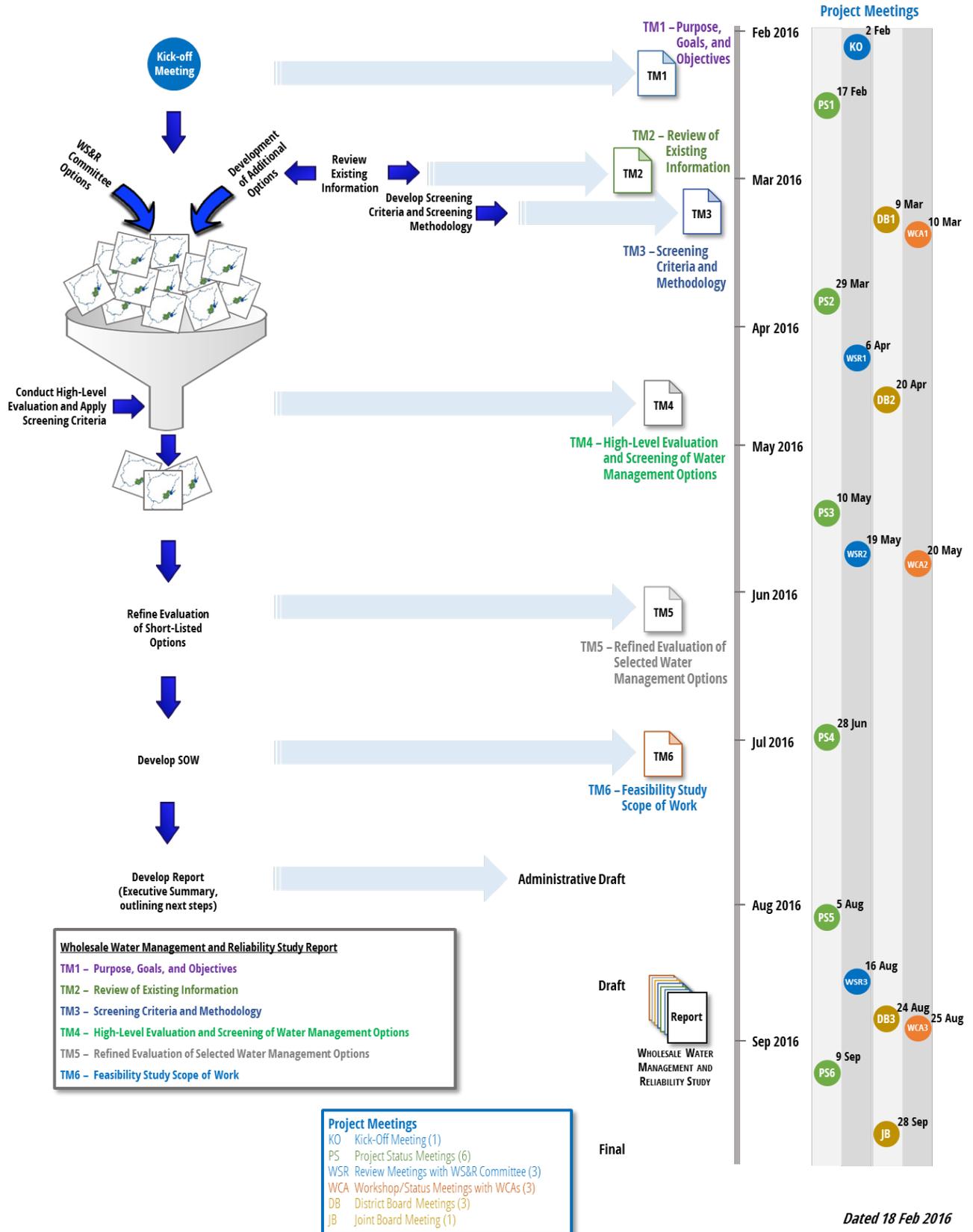


Figure 1. Process to Develop the Wholesale Water Supply Reliability Study

Table 1. Wholesale Water Management and Reliability Study Roles and Responsibilities

	Responsible	Accountable	Consulted	Informed	
GROUP	R	A	C	I	ANTICIPATED ACTIVITIES
District Staff	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<ul style="list-style-type: none"> * Review Study progress (technical, schedule, budget, etc.) * Address review comments * Resolve issues * Prepare for upcoming meetings * Provide direction to Consultant
Water Supply & Reliability Committee			<input checked="" type="checkbox"/>		<ul style="list-style-type: none"> * Review Study progress * Provide input (review comments, study direction, etc.) * Participate in Study exercises * Preview upcoming activities
District Board		<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> * Become informed on Study progress * Provide input (review comments, study direction, larger policy issues, etc.) * Preview upcoming activities * Receive Final Report * Act on next steps/recommendations
Wholesale Customer Agencies				<input checked="" type="checkbox"/>	<ul style="list-style-type: none"> * Become informed on Study progress * Provide input (review comments, etc.) * Preview upcoming activities
MWH Team	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>			<ul style="list-style-type: none"> * Conduct Study based scope of work and on direction provided by District staff * Develop meeting materials and conduct meetings * Present issues to be resolved to District staff as well as items requiring input from Water Supply & Reliability Committee and/or District Board * Adhere to schedule and budget

Key:

- R = Responsibility describes where the work is done, who is responsible for carrying out a task.
- A = Accountability describes where the buck stops, who is held accountable.
- C = Consulted are the critical people who need to contribute prior to completing the activity.
- I = Informed indicates that it is less critical for this person to be involved but they need to be updated and informed about the outcome of the activity.

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