



# San Miguel Community Services District

## BOARD OF DIRECTORS

Raynette Gregory, President                      Anthony Kalvans, Vic-President  
Ward Roney, Director                              Hector Palafox, Director                      Crystal Lara, Director

### TUESDAY, AUGUST 16<sup>TH</sup>, 2022 6:15 P.M. to 8:15 P.M. Opened Session STRATEGIC PLANNING WORKSHOP #2 BOARD OF DIRECTORS SPECIAL MEETING AGENDA

**Cell Phones:** As a courtesy to others, please silence your cell phone or pager during the meeting and engage in conversations outside the Boardroom.

**Americans with Disabilities Act:** If you need special assistance to participate in this meeting, please contact the CSD Clerk at (805) 467-3388. Notification 72 hours in advance will enable the CSD to make reasonable arrangements to ensure accessibility to this meeting.

**Public Comment:** Sign in sheet at podium for public comment.  
Comments are **limited to three (3) minutes** unless you have registered your organization with CSD Clerk prior to the meeting. If you wish to speak on an item not on the agenda, you may do so under item VII “Public Comment and Communications for items not on the agenda”. Person(s) who wish to submit written correspondence, may do so at [www.sanmiguelcsd.org](http://www.sanmiguelcsd.org). All correspondence is distributed to each Board of Director and will become part of the record of that Board Meeting. Any member of the public may address the Board of Directors on items on the Consent Calendar.

**Meeting Schedule:** Regular Board of Director meetings are generally held in the SMCS D Boardroom on the fourth Thursday of each month at 7:00 P.M. Agendas are also posted at: [www.sanmiguelcsd.org](http://www.sanmiguelcsd.org)

**Agendas:** Agenda packets are available for public inspection 72 hours prior to the scheduled meeting at the posting board /San Miguel CSD office located at 1150 Mission St., San Miguel, during normal business hours. Any agenda-related writings or documents provided to a majority of the Board of Directors after distribution of the agenda packet are available for public inspection at the same time at the counter/ San Miguel CSD office at 1150 Mission St., San Miguel, during normal business hours.

- I.     **Call to Order:**                                      **6:15 PM**
- II.    **Pledge of Allegiance:** \_\_\_\_\_
- III.   **Roll Call:** *Gregory* \_\_\_ *Kalvans* \_\_\_ *Palafox* \_\_\_ *Lara* \_\_\_ *Roney* \_\_\_
- IV.   **Approval of Special Meeting Agenda:**

M \_\_\_\_\_                                      S \_\_\_\_\_                                      V \_\_\_\_\_

V. ADJOURN TO CLOSED SESSION: None

VI. Call to Order for Regular Board Meeting/Report out of Closed Session: None

VII. Public Comment and Communications for items not on the Agenda:

Persons wishing to speak on a matter not on the agenda may be heard at this time; however, no action will be taken until placed on a future agenda. Speakers are limited to three minutes. Please complete a "Request to Speak" form and place in basket provided.

VIII. Special Presentations/Public Hearings/Other: None

IX. Staff & Committee Reports – Receive & File: None

X. CONSENT CALENDAR: None

The items listed below are scheduled for consideration as a group and one vote. Any Director or a member of the public may request an item be withdrawn from the Consent Agenda to discuss or to change the recommended course of action. Unless an item is pulled for separate consideration by the Board, the following items are recommended for approval without further discussion.

XI. BOARD WORKSHOP ITEMS:

1. Board review of Draft District Strategic Plan. (Rev7)

**Recommendation:** Board will review and comment on the District 5-year strategic plan and provide direction to Staff and Consultant.

**Public Comments:** (Hear public comments)

XII. BOARD COMMENT:

This section is intended as an opportunity for Board members to make brief announcements, request information from staff request future agenda item(s) and/or report on their own activities related to District business. No action is to be taken until an item is placed on a future agenda.

XIII. ADJOURNMENT TO NEXT MEETING

ATTEST:

STATE OF CALIFORNIA            )  
COUNTY OF SAN LUIS OBISPO   ) ss.  
COMMUNITY OF SAN MIGUEL    )

I, Tamara Parent, Board Clerk/Accounts Manager of San Miguel Community Services District, hereby certify that I caused the posting of this agenda at the SMCSO office on 8-9-2022

Raynette Gregory, President of the Board of Directors, SMCSO

Rob Roberson, Interim General Manager/Fire Chief

Tamara Parent, Board Clerk/ Accounts Manager

**Board of Directors** – please see this as a narrative draft only. Some parts have yet to be completed and format/design. We will use this draft for you review at the August review meeting. There are some sections marked in **Yellow** that will require further Board/Staff discussions at the meeting.

## San Miguel CSD Strategic Plan 2022-2027

– Narrative draft

## **SMCSD Strategic Planning Team**

### **Board of Directors**

Raynett Gregory, President  
Anthony Kalvans, Vice-President  
Hector Palafox, Director  
Ward Roney, Director  
Crystal Lara, Director

### **District Management**

Rob Roberson, Interim General Manager and Fire Chief  
Kelly Dodds, Director of Utilities  
Tamara Parent, Board Clerk and Accounts Manager  
Scott Young, Assistant Fire Chief and Fire Prevention Officer  
Michelle Hido, Financial Officer

### **Consultant**

Brent H. Ives, Principal, BHI Management Consulting

Table of Contents (*TBD*)

## Message from the General Manager

As General Manager, I recognize the need for the District to establish a Strategic Plan that will focus the Board of Directors and Staff in the planning of the operational needs for the district. In this current economic state of society, it has become more prevalent to develop and implement a plan that can and will prepare the district to meet the challenges we will face now and into the future. The district needs to be in a position to respond and act on the challenges instead of reacting with unplanned actions and limited resource. As we develop and achieve benchmarks with the plan the District needs to stay focused on the overall goal.

The San Miguel CSD Directors and Staff have actively developed this Strategic Plan to outline the future operational needs of the District and to achieve the goals for the vision that of the District. The Plan also identifies the actions and tactics required to lay the foundation that will set the course for the district and the future development. This plan creates a roadmap designed to meet the operational, governance and financial needs of the community for the next five years and into the future.

Robert Roberson

Forward

from the Board President (*TBD*)

## Plan Development Process

In FY 2021/22, the District retained the services of BHI Management Consulting (BHI) to facilitate and coordinate the updating of the District's five-year Strategic Plan. BHI first gathered input directly from District staff and individual members of the Board of Directors. This was followed by two Board and staff planning workshops. At each meeting the District Mission and 5-year Vision and implementing actions were discussed. The Board supported this process to allow participation in the foundation of the Strategic Plan. The Board developed a new Mission statement a new Vision statement for the District. The Board also identified the six strategic focus areas around which to organize implementation of strategic actions over the next five years.

Following the Board workshops, key staff members, worked with BHI to develop the Strategic Element objective and strategy statements and Strategic goals, actions and tactics in support of each focus to make the Board's Vision reality within the 5-year timeframe. Using this process, this Strategic Plan provides a roadmap for the District and guided by the Board's Vision over the next five years. This Plan was then vetted with the Board a final time prior to approval.

The simple organization of the Plan is outlined first by Mission/Vision. Next come the six, five-year strategic focus areas, then the actions needed to fulfill the vision. Finally, Table 1 provides an overview of the plan with associated dates for actions and goals within the next five years.



**Mission –**

The San Miguel Community Services District was formed and remains committed to efficiently serving the community with fire protection, water, wastewater, street lighting and solid waste services in San Miguel.

**Vision –**

In next 5 years we plan to:

- move our administration to the new WWTF and successfully opened our new wastewater treatment facility. (Facility, 2022-25)
- remodel the fire station adding an additional apparatus bay, accommodating increased fire staffing, and creating more space for community meetings. This will also allow for a Sheriff's Beat Station. (Facility, 2023-25)
- complete the Fire Department LAFCO redistricting process. (Fire, 2022-24)
- stabilize the water resources portfolio while maintaining fiscally responsible water rates. (Ops/Finance, 2024-25)
- continue with a strong and productive Board culture. (Admin/Governance, 2023-Ongoing)
- have successfully transitioned to a new General Manager. (Admin, 2022-23)
- gain increased influence in county and state regional decisions affecting the District. (Political, 2023-25)
- have deliberately improved staffing and equipment for all facilities. (2023-26)
- implement a proactive public relations program. (2022-ongoing)

**STRATEGIC FOCUS AREAS** – The board of directors has identified six areas of district operations where time, effort and resources must be focused within the next five years to protect and advance the mission. These are:

- 1.0 WATER RESOURCES
- 2.0 WASTEWATER SERVICE
- 3.0 FIRE SERVICES
- 4.0 GOVERNANCE AND ADMINISTRATION
- 5.0 FINANCE MANAGEMENT
- 6.0 COMMUNITY AND STRATEGIC PARTNER RELATIONS

## 1.0 WATER RESOURCES

*Objective description and general approach:* Our objective is to identify and deliver high-quality, reliable and affordable water for District residents.

### 1.1 PROVIDE WATER SUPPLY STABILIZATION AND DIVERSIFICATION

Objective description and general approach:

- Diversify the Districts water portfolio and reduce groundwater pumping by identifying opportunities to obtain and use recycled and or surface waters.

Objective Goals and Deliverables for the Goal:

- Identify consultant(s) to perform the analysis
- Identify and analyze available sources of recycled and surface waters.
- Identify and analyze potential users for the recycled and surface waters.

Objective estimated completion date:

- Ongoing, initial source identification should start by 2025
- Begin coordination with relevant stakeholders around 2025.

### 1.2 MAINTAIN A STRONG ROLE ON THE REGIONAL GROUNDWATER SUSTAINABILITY PLANNING

Objective description and general approach:

- Maintain a strong presence within the Paso Basin Cooperative Committee (PBCC) as a Groundwater Sustainability Agency (GSA) by being proactive and passing of forward-thinking policies.

Objective Goals and Deliverables for the Goal:

- Coordinate efforts with other GSAs and the PBCC.
- Consider and establish meaningful policy to protect the groundwater basin.
- Consider and implement projects to improve the groundwater basin.

Objective estimated completion date:

- Ongoing engagement with the PBCC and other GSAs
- Within 1 year engage in planning for projects that benefit the groundwater basin. (FY 2023/24)

### 1.3 INCREASE OUR WATER STORAGE ON THE EAST SIDE OF THE RIVER

Objective description and general approach:

- Design and build a new water storage tank farm and pump station for the San Lawrence Terrace.

Objective Goals and Deliverables for the Goal:

- Identify the scope of the project
- Identify and apply for funding for the project.
- Board approval of scope and funding
- Develop plans and specifications
- Build project.

Objective estimated completion date:

- Design and funding (FY 2022-23)
- Project completion (FY2023-25)

### 1.4 BEGAN A PROACTIVE STUDY FOR THE LONG-TERM (20 YEAR) WATER NEEDS

Objective description and general approach:

- Our objective is to develop a long-term water needs outlook

Objective Goals and Deliverables for the Goal:

- Work with Board of Directors to develop scope of work
- Identify consultant(s) to perform study and analysis.
- Identify costs and funding mechanisms.

Objective estimated completion date:

- Started by 2025, will be a multiyear process.

-DRAFT-

## 2.0 WASTEWATER SERVICE

Objective description and general approach: Our objective in providing wastewater services for District residents is to meet all state regulations for the collection and treatment of wastewater.

### 2.1 OPEN AND OPERATE THE NEW WASTEWATER TREATMENT FACILITY

Objective description and general approach:

- Under order by the State Regional Water Board, upgrade and expand the Machado Wastewater Treatment Facility.

Objective Goals and Deliverables for the Goal:

- Determine overall wastewater needs and define the scope of the project.
- Secure funding for project.
- Design and construct the project.

Objective estimated completion date:

- Currently under design for this project. Completion of design is estimated to be early 2023.
- Funding approval anticipated in mid-2022 with additional funding applications to be completed in late 2022 to 2023.
- Construction to start in mid-2023 to be completed in early 2024

### 3.0 FIRE SERVICES

Objective description and general approach: We will continually prepare to meet the growing demands for high-quality Fire and Emergency Services for our District service area.

#### 3.1 *SUCCESSFULLY COMPLETE THE REDISTRICTING PROCESS WITH LAFCO AND SAN LUIS OBISPO COUNTY.*

Objective description and general approach:

- The Fire Department Staff has worked through the process with LAFCO and the County Board of Supervisors to finalize the Fire Department District boundaries

Objective Goals and associated Dates for the Goal:

- SMCSD Board approval for redistricting (FY2022/23)
- Complete formal application process for redistricting to LAFCO (FY2022/23)
- Work with LAFCO to receive approval for redistricting. (FY 2023-24)
- Receive County Board of Supervisors approval (FY2023-24)

#### 3.2 INSTALL AND USE OUR TEMPORARY HOUSING UNIT/SHERIFF'S BEATSTATION

Objective description and general approach:

- Have temporary housing unit (THU) installed to provide housing for a Duty Officer on-site and enhance response times.

Objective Goals and associated Dates for the Goal:

- Procure temporary housing unit (FY2022)

- Procure SLO County building permits (FY2022/23)  
In process (May 2022)
- Proceed with site improvement's (FY2022/23)  
Start improvements as SLO County permits are issued
- Install THU (FY2022/23)
- Fully operational (Fall 2022/23)

**3.3 FIRE APPARATUS BAY HAS BEEN COMPLETED AND ALL EQUIPMENT SHALL BE MODERN AND WELL-MAINTAINED**

Objective Goals and associated Dates for the Goal:

- Proceed with the planning process required for the construction of the proposed apparatus building.
- Complete design around future vehicle/equipment replacement as required per NFPA guidelines. (FY2022-23)
- Identify and acquire funding (FY2022-23)
- Complete new apparatus bay (FY2023-24)

**3.4 REMODEL FIRE STATION**

Objective Overview:

- Remodel the current station to contain and facilitate;
  - Fire Department Administration
  - Sheriff Beat Station
  - EOC (Emergency Operation Center) and or Meeting Room and or Training Room Public access Meeting Room
  - Fire Staff quarters to accommodate up to 4 staff members
- Objective Goals and associated Dates for the Goal:
  - Proceed with the planning process required for the construction of the proposed Fire Station remodel (FY2022-23)

- Explore funding sources for design and construction (FY2022-23)
- Complete design documents (FY2023-24)
- Identify and acquire funding (FY2023-24)
- Begin remodel activities (FY2024-25)
- Complete remodel (FY2025-26)

### 3.5 ENHANCE FIRE DEPARTMENT STAFFING

#### • Objective description and general approach:

- Maintain and provide duty officer coverage.

#### • Objective Goals and Deliverables for the Goal:

- Respond to new housing by adjusting fire staffing accordingly.
- Receive additional funding per redistricting (3.1) to enhance staffing, etc. (FY2023-24)



## 4.0 GOVERNANCE AND ADMINISTRATION

*Objective description and general approach:* Our objective is to conduct District business in a professional and productive manner at all levels.

### 4.1 WE WILL CONTINUE TO WORK ON A LONG-TERM PRODUCTIVE BOARD CULTURE AT SMCSD

- Objective descriptor: The Board of Directors currently enjoys positive relationships with the public at-large, the District staff, other public agencies and each other. As such, it is the intention to maintain this type culture for each successive Board into the future. This requires a certain dedication to the entire San Miguel public to represent them in a civil and productive way.
  - We will develop and maintain and adhere to a SMCSD Board training schedule (FY2023-24)
- Objective Goals and Deliverables for the Goal:
  - Each Board member will complete scheduled training as required. (Ongoing)
  - The Board of Directors will annually review Board Handbook/By-laws with a facilitator. (FY2023-24)
  - We will track each Board member to assist in keeping them current with their training. (Ongoing)

## 5.0 FINANCE

Objective description and general approach: We will adhere to the highest financial standards and processes for fiscal solvency and transparency.

### **5.1 WE WILL DILIGENTLY WORK TO MAINTAIN FISCALLY RESPONSIBLE WATER AND WASTEWATER RATES**

Objective description and general approach:

- Through good forward planning, utilizing best management practices, and optimizing operations we will strive to eliminate unplanned expenses and implement sustainable water and wastewater rates.
- Engage in a Cost-of-Service Rate Study for the next 5 years to begin in July 2022-23 for FY2023-24 implementation
- Analyze the operations of the District and forecast staffing, equipment, and operational costs. (FY2022-23)
- Regularly update the water and wastewater masterplans with up-to-date priorities and costs. (Every 3-5 years, next update both in FY2022-23)
- Where possible, complete prework for pending projects to position the District for shovel ready grant opportunities. (when financially possible)
- Work with other agencies to identify and secure funding opportunities. (Ongoing)...

### **5.2 WE WILL PERFORM A STUDY TO OUTLINE POTENTIAL SOURCES OF REVENUES**

Objective Description: Work with Board to develop the scope of this comprehensive study to identify and analyze existing and potential new mission-related revenue sources for District departments.

Objective Goals and associated Dates for the Goal:

- Determine entity(ies) to perform study (FY2023/24)

- Determine funding mechanisms for study (FY2023/24)
  - Perform study and report to Board on findings. (FY2024/25)

### 5.3 WE WILL PERFORM A STAFFING ANALYSIS IN SUPPORT OF THE DISTRICT MISSION

- Perform an analysis of current and future staffing needs to ensure adequate ability to support the Districts Mission.

- Objective Goals and associated Dates for the Goal:

- Assess current staffing and staff duties in all departments. (FY2022/23)
- Determine future staffing needs for next 5 years for planned growth and expansions. (FY2022/23)
- Analysis the current and future staffing needs and provide a recommendation based on results. (FY2022/23)

### 5.4 WE WILL PERFORM A DISTRICT RATE STUDY THAT ALLOWS FOR MISSION APPROPRIATE COMMUNITY RELATED NEEDS

- Objective Goals and associated Dates for the Goal:

- Conduct a Board workshop to allow for broad discussion, clarity, potential and scope determination of this topic, providing direction to staff. (FY2022/23)

## 6.0 COMMUNITY AND STRATEGIC PARTNER RELATIONS

*Objective description and general approach:* We will be a leading public organization within the San Miguel community. We will facilitate mission related informational workshops, for the overall good of the community.

### **6.1 WE WILL ENHANCE THE CURRENT HIGH-LEVEL OF COMMUNITY ENGAGEMENT**

**Discuss expectations and Mission nexus at workshop)–**

- Objective Goals and associated Dates for the Goal: (Enhance in FY2022-23- Ongoing)

### **6.2 WE WILL INCREASE OUR LEVEL OF PRESENCE AND INFLUENCE WITH COUNTY**

**RELATED PLANNING AND DECISION MAKING (Resource intensive to increase the current level of engagement. Discuss expectations at workshop)**

- Objective Goals and associated Dates for the Goal: (Enhance in FY2022-23- Ongoing)

### **6.3 WE WILL ACHIEVE CERTIFICATION FOR TRANSPARENCY FROM CSDA**

**(Requires full Board participation)**

### **6.4 WE WILL PARTICIPATE IN OPPORTUNITIES FOR OUR COMMUNITY TO COLLECTIVELY PLAN AND STRATEGIZE FOR A PROSPEROUS FUTURE**

- Objective Overview:

- We will consider ways to help in a bigger way as the community core.
- We will allow use of our prime location for development of business partnerships and supporting of conditions and planning for growth and overall economic development, including groups like CSD, Chamber, Advisory Council, and other public groups formed for the overall good of San Miguel.

- Objective Goals and associated dates for the Goal: (FY2022-23- Ongoing)
- Work with Board of Directors to develop scope of effort and define costs. (FY2023-24)

### **6.5 WE WILL TAKE DELIBERATE STEPS TO COMMUNICATE ABOUT DISTRICT ACHIEVEMENTS**

Objective Goals and associated Dates for the Goal:

- We will begin making more deliberate and formal press releases to a broad media set deliberately getting to word out of beneficial actions of the District. (FY2022-24)

Vision to Action Table Strategic Focus	Strategic Goals	Proposed Objective Dates
1.0 Water Resources	1.1 Water Supply Stabilization and Diversification 1.2 Maintain Strong Role in Groundwater Planning 1.3 Extended Water Storage 1.4 Begun long-term (20 yr.) Water Study	1.1 2023-ongoing 1.2 2023-ongoing 1.3 2023-25 1.4 2025
2.0 Wastewater	2.1 Opened and Operating New Wastewater Treatment Plant	2.1 2023-24
3.0 Fire Service	3.1 Complete Redistricting process with LAFCO/County 3.2 Opened and are Staffing new Fire Temporary Housing Unit 3.3 Fire apparatus Bay/Equipment 3.4 Remodel Fire Station 3.5 Enhance Fire Staffing	3.1 2022-24 3.2 2022-23 3.3 2023-24 3.4 2023-26 3.5 2023-24
4.0 Governance/Administration	4.1 We continue to work on maintaining a strong Board culture	4.1 2023-ongoing
5.0 Finance	5.1 Fiscally responsible water and wastewater rates 5.2 Revenue Sources Study 5.3 Staffing Analysis 5.4 Rate Study with community consideration	5.1 2022-23 -ongoing 5.2 2023-25 5.3 2022-23 5.4 2023-24
6.0 Community and Partner Relations	6.1 Enhanced Community engagement 6.2 Increased regional engagement, relations and influence 6.3 CSDA Transparency Certification 6.4 Participate in Community Planning 6.5 Proactively communicate the District news	6.1 20xx 6.2 20xx 6.3 2023-ongoing 6.4 2022-ongoing 6.5 2022-24

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## San Miguel CSD Strategic Plan 2022-2027

- Narrative draft

**SMCSD Strategic Planning Team**

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**Message from the General Manager**

As General Manager, I recognize the need for the District to establish a Strategic Plan that will focus the Board of Directors and Staff in the planning of the operational needs for the district. In this current economic state of society, it has become more prevalent to develop and implement a plan that can and will prepare the district to meet the challenges we will face now and into the future. The district needs to be in a position to respond and act on the challenges instead of reacting with unplanned actions and limited resource. As we develop and achieve benchmarks with the plan the District needs to stay focused on the overall goal.

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Robert Roberson

from the Board President (*TBD*)

Forward

**Strategic**

**Plan Development Process**

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**Mission –**

The San Miguel Community Services District was formed and remains committed to efficiently serving the community with fire protection, water, wastewater, street lighting and solid waste services in San Miguel.

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**Vision –**

In next 5 years we plan to:

- move our administration to the new [WWTP-WWTF](#) and successfully opened our new wastewater treatment facility. (Facility, 2022-25)
- remodel the fire station adding an additional [apparatus bay](#), [accommodating increased fire staffing](#), and creating more space for [community meetings](#). This will also allow for [a Sheriff’s Beat Station](#). (Facility, 2023-25)[are now hosting the sheriff here](#)
- complete the [Fire Department LAFCO redistricting process](#). (Fire, 2022-24)
- [stabilize/stabilize the water resources portfolio and while maintaining fiscally responsible stablewater rates](#). (Ops/Finance, 2024-25)
- continue with a [great strong and productive](#) Board culture. (Admin/Governance, 2023-Ongoing)
- have successfully transitioned to a new General Manager. (Admin, 2022-23)
- [gain increased influence in the county and state regional decisions affecting the District](#). (Political, 2023-25)
- [Consider a plan for the identification of discretionary revenues and optimize sources of revenue.](#) (Mission Ancillary, 3-5)??
- have [deliberately improved kept up with needed](#) staffing and equipment for [new/all](#) facilities. (2023-26)
- [have develop](#) implement a [proactive](#) public relations program. (2022-ongoing)

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Commented [KD1]: I have a really hard time with this. There are no "Discretionary" funds. Everything is collected for a reason and spent in support of that reason.

Commented [B2R1]: RR agrees that this has no merit

**STRATEGIC FOCUS AREAS** – The board of directors has identified six areas of district operations where time, effort and resources must be focused within the next five years to protect and advance the mission. These are:

- 1.0 WATER RESOURCES
- 2.0 WASTEWATER SERVICE
- 3.0 FIRE SERVICES
- 4.0 GOVERNANCE AND ADMINISTRATION
- 5.0 FINANCE MANAGEMENT
- 6.0 COMMUNITY AND STRATEGIC PARTNER RELATIONS

### 1.0 WATER RESOURCES

Objective description and general approach: Our objective is to identify and deliver high-quality, reliable and affordable water for District residents.

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#### 1.1 PROVIDE WATER SUPPLY STABILIZATION AND DIVERSIFICATION

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Objective description and general approach:

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Objective Goals and Deliverables for the Goal:

- Identify consultant(s) to perform the analysis
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-Objective estimated completion date:

- Ongoing, initial source identification should start by 2025
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#### 1.2 WE PLAY A MAINTAIN A STRONG ROLES ON THE REGIONAL GROUNDWATER SUSTAINABILITY PLANNING RIGHTS

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- [Within 1 year engage in planning for projects that benefit the groundwater basin. \(FY 2023/24\)](#)

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**1.3 EXTENDED-INCREASE OUR WATER STORAGE ON THE EAST SIDE OF THE RIVER**

Objective description and general approach:

- [Design and build a new water storage tank farm and pump station for the San Lawrence Terrace.](#)

Objective Goals and Deliverables for the Goal:

- [Identify the scope of the project](#)
- [Identify and apply for funding for the project.](#)
- [Board approval of scope and funding](#)
- [Develop plans and specifications](#)
- [Build project.](#)

Objective estimated completion date:

- [Design and funding \(FY 2022-23\)](#)
- [Project completion \(FY2023-25\)](#)

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**1.4 BEGAN A PROACTIVE STUDY FOR THE LONG-TERM (20 YEAR) WATER TREATMENT FACILITY NEEDS.**

Objective description and general approach:

- [Our objective is to develop a long-term water needs outlook](#)

Objective Goals and Deliverables for the Goal:

- [Work with Board of Directors to develop scope of work](#)
- [Identify consultant\(s\) to perform study and analysis.](#)
- [Identify costs and funding mechanisms.](#)

Objective estimated completion date:

- [Started by 2025, will be a multiyear process.](#)

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~~Objective description and general approach:~~

~~Objective Goals and Deliverables for the Goal: Objective-~~

~~estimated completion date:~~

~~Related metrics for deliverable~~



## 2.0 WASTEWATER SERVICE

Objective description and general approach: Our objective in providing wastewater services for District residents is to meet all state regulations for the collection and treatment of wastewater.

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### 2.1 OPEN AND OPERATE THE NEW WASTEWATER TREATMENT PLANT FACILITY

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Objective description and general approach:

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- Under order by the State Regional Water Board, upgrade and expand the Machado Wastewater Treatment Facility.

Objective Goals and Deliverables for the Goal:

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- Determine overall wastewater needs and define the scope of the project.
- Secure funding for project.
- Design and construct the project.

Objective estimated completion date:

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- Currently under design for this project. Completion of design is estimated to be early 2023.
- Funding approval anticipated in mid-2022 with additional funding applications to be completed in late 2022 to 2023.
- Construction to start in mid-2023 to be completed in early 2024

Objective description and general approach:

Objective Goals and Deliverables for the Goal:

Objective estimated completion date:

Related metrics for deliverable tracking:

3.0 FIRE SERVICES

3.0

Objective description and general approach: We will ~~be continually prepared~~ to meet the growing demands ~~to be sustainable~~ for high-quality Fire and Emergency Services for our District service area. ~~for the foreseeable future~~ .....

3.1 ~~SUCCESSFULLY OPENED AND ARE STAFFING THE FIRE HOUSING UNIT~~ COMPLETE THE REDISTRICTING PROCESS WITH LAFCO AND SAN LUIS OBISPO COUNTY

3.1

Objective description and general approach:

- The Fire Department Staff has worked through the process with LAFCO and the County Board of Supervisors to finalize the Fire Department District boundaries

Objective Goals and associated Dates for the Goal: Objective Goals and Deliverables for the Goal:-

- SMCSD Board Approval for redistricting (FY2022/23)
- Complete formal application process for redistricting to LAFCO (FY2022/23)
- Work with LAFCO to receive approval for redistricting. (FY 2023-24)
- Receive County Board of Supervisors approval (FY2023-24).....

Objective estimated completion date:

Within two year timeline Related metrics for:

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deliverable tracking

~~Receive LAFCO approval to move forward~~

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~~LAFCO presents to the SLO County Board of Supervisor for approval~~

~~Approval received, Fire District is redistricted...~~

~~Objective description and general approach:  
Objective Goals and Deliverables for the Goal:  
Objective estimated completion date:~~

Related metrics for deliverable track

3.2 ARE PLANNING OUR INSTALL AND USE OUR TEMPORARY HOUSING UNIT/SHERIFF'S BEATSTATION FIRE STATION

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Objective description and general approach:

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- Have temporary housing unit (THU) installed to provide housing for a Duty Officer increase staffing on-site and enhance response times.

Objective Goals and associated Dates for the Goal: etive Goals and Deliverables for the Goal:

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- Procure temporary housing unit (FY2022)
- Procure SLO County building permits (FY2022/23)  
In process (May 2022)
- Proceed with site improvement's (FY2022/23)  
Start improvements as SLO County permits are issued
- Install THU (FY2022/23)
- Fully operational (Fall 2022/23)
- ~~Complete project within budget and~~

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within a realistic time frame...

Objective estimated completion date:

Fall 2022...

Related metrics for deliverable tracking

Procure Temporary Housing unit

Procure SLO County building permits

Proceed with site improvement's

Install Housing Unit

Proceed with intended use...

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Objective description and general approach:

Objective Goals and Deliverables for the Goal:

Objective estimated completion date:

Related metrics for deliverable tracking:

~~3.2.1 FIRE SERVICE APPARATUS BAY HAS BEEN COMPLETED AND ALL EQUIPMENT SHALL BE CONTINUE TO BE MODERN AND WELL-MAINTAINED~~

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Objective Goals and associated Dates for the Goal:

Objective description and general approach:

- Proceed with the planning process required for the construction of the proposed apparatus building.
- Complete design around future vehicle/equipment replacement as required per NFPA guidelines. (FY2022-23-24)
- Identify/ and aAcquire Ffunding (FY2022-23)
- Complete New-new Apparatus-apparatus Baybay (FY2023-24)

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~~Objective Goals and Deliverables for the Goal:~~

~~Explore funding sources for design and construction...~~

~~Objective estimated completion date:~~

~~Within 3 years (2025)...~~

~~Related metrics for deliverable tracking~~

~~Complete design documents~~

~~Identify/Acquire Funding...~~

~~Objective description and general approach:~~

~~Objective Goals and Deliverables for the Goal:~~

~~Objective estimated completion date:~~

~~Related metrics for deliverable tracking:~~

3.4 REMODEL ~~NEW~~ FIRE STATION—New Fire Station remodel (new section—Tamara??)

Objective Overview:

- Remodel the current station to contain and facilitate:
  - Fire Department Administration
  - Sheriff Beat Station
  - EOC (Emergency Operation Center) and or Meeting Room and or Training Room Public access Meeting Room
  - Fire Staff quarters to accommodate up to 4 staff members

- Objective Goals and associated Dates for the Goal:

- Objective description and general approach:

Proceed with the Planning process required for the construction of the proposed Fire Station remodel (FY2022-23xx xx).

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23xx-xx)

- Explore funding sources for design and construction (FY2022-23xx-xx)
- Complete design documents (FY2023-24xx-xx)
- Identify/A and acquire fFunding (FY2023-24xx-xx)
- Begin remodel activities (FY2024-25xx-xx)
- Complete remodel (FY2025-26xx-xx)

- ~~Remodel the current station to contain and facilitate~~
  - ~~Fire Department Administration~~
  - ~~Sheriff Beat Station~~
  - ~~EOC (Emergency Operation Center) and or Meeting Room and or Training Room Public access Meeting Room~~
  - ~~Fire Department Staff Quarters to accommodate up to 4 staff members~~
    - \* ~~Kitchen~~
    - \* ~~Dinning~~
    - \* ~~Day Room~~
    - \* ~~4 Bedrooms~~
    - \* ~~Bathrooms~~
    - \* ~~Shower / Locker rooms~~

Objective Goals and Deliverables for the Goal:

- Explore funding sources for design and construction
- Complete design documents
- Identify/Acquire Funding

-Objective estimated completion date:

Within 3 years (2

-ENHANCE FIRE DEPARTMENT STAFFING

3.5

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• Objective description and general approach:

- Maintain and ~~provide~~approve duty officer coverage.

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• Objective Goals and Deliverables for the Goal:

- Respond to new housing ~~unit~~ by adjusting fire staffing accordingly.
- Receive additional funding ~~per redistricting (3.1)~~ to enhance staffing, etc. (FY2023-2426-26)

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-Objective estimated completion date:

Within 3 years (2025)

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Related metrics for deliverable tracking

- Complete LAFCO process and acquire additional funding

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4.0 FACILITIES

We will provide proper facilities to best serve the District for our high service levels and response.

4.1 WE HAVE COMPLETED OUR NEW STAFF HOUSING PROJECT AT THE WASTEWATER TREATMENT PLANT/FIRE STATION

Objective description and general approach:

...

Objective Goals and Deliverables for the Goal:

...

Objective estimated completion date:

...

Related metrics for deliverable tracking:

...

Objective description and general approach:

Objective Goals and Deliverables for the Goal:

Objective estimated completion date:

Related metrics for deliverable tracking:

4.2 WE HAVE PROVIDED SPACE FOR A COUNTY SHERIFF RIF BEAT STATION WITHIN DISTRICT FACILITIES/FIRE STATION

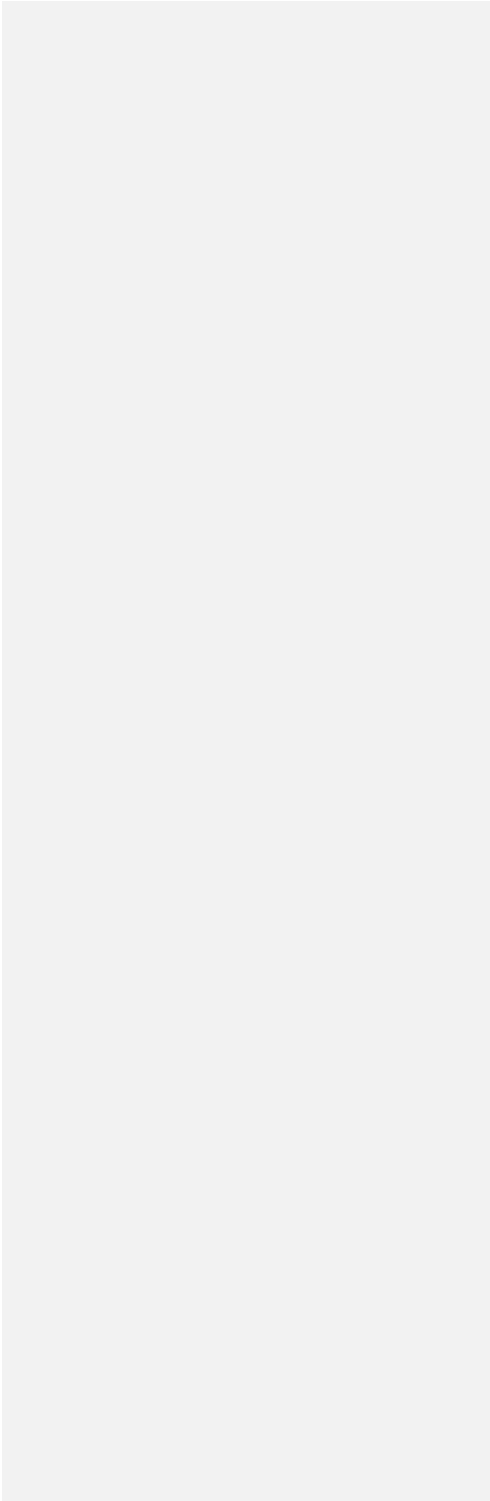
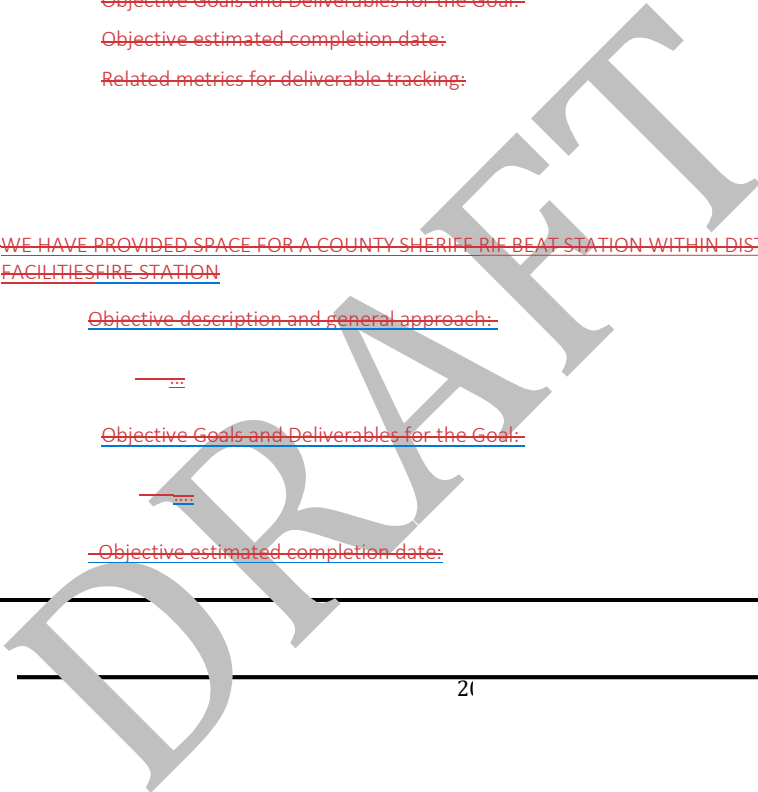
Objective description and general approach:

...

Objective Goals and Deliverables for the Goal:

...

Objective estimated completion date:





~~Related metrics for deliverable tracking~~

~~Objective description and general approach:-~~

~~Objective Goals and Deliverables for the Goal:-~~

~~Objective estimated completion date:-~~

~~Related metrics for deliverable tracking:-~~

### 4.0 GOVERNANCE AND ADMINISTRATION

Objective description and general approach: Our objective is to conduct District business in a professional and productive manner at all levels. Objective description and general approach: Objective Goals and Deliverables for the Goal: Objective estimated completion date:

Related metrics for deliverable tracking:

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#### 5-04.1 WE WILL CONTINUE TO WORK ON A LONG-TERM PRODUCTIVE BOARD CULTURE AT SMCS D

Objective descriptor: ion and general approach: The Board of Directors currently enjoys positive relationships with the public at-large, the District staff, other public agencies and each other. As such, it is the intention to maintain this type culture for each successive Board into the future. This requires a certain dedication to the entire San Miguel public to represent them in a civil and productive way.

- We will develop and maintain and adhere to a SMCS D Board training schedule (FY2023-24)

Objective Goals and Deliverables for the Goal:

- Each Board member will complete scheduled training as required. (Ongoing)
- The Board of Directors will annually review Board Handbook/By-laws - a code of conduct with a facilitator. (FY2023-24)

- We will -Objective estimated completion date:

Related metrics for deliverable tracking track each Board member to assist in keeping them current with their training. (Ongoing)

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Objective description and general approach:-  
Objective Goals and Deliverables for the Goal:-  
Objective estimated completion date:  
Related metrics for deliverable tracking:

5.3

~~Objective description and general approach:-~~

~~...~~

~~Objective Goals and Deliverables for the Goal:-~~

~~...~~

~~Objective estimated completion date:~~

~~...~~

~~Related metrics for deliverable tracking~~

~~...~~

Objective description and general approach:-  
Objective Goals and Deliverables for the Goal:-  
Objective estimated completion date:  
Related metrics for deliverable tracking:

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6.05.0 FINANCE

Objective description and general approach: We will adhere to the highest financial standards and processes for fiscal solvency and transparency.

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**56.1 WE WILL DILIGENTLY WORK TO STABILIZE MAINTAIN FISCALLY RESPONSIBLE WATER AND WASTEWATER RATES AND AVOID WATER RATE INCREASES**

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Objective description and general approach:

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- Through good forward planning, utilizing best management practices, and optimizing operations we will strive to eliminate unplanned expenses and stabilize implement sustainable water and wastewater rates.
- Engage in a Cost-of-Service Rate Study for the next 5 years starting to begin in FY 2023-24 July 2022-23 start for FY2023-24 approval implementation
- Analyze the operations of the District and forecast staffing, equipment, and operational costs. (FY2022-23)
- Regularly update the water and wastewater masterplans with up-to-date priorities and costs. (Every 3-5 years, beginning in next update both in FY2022-23-XXXX)
- Where possible, complete prework for pending projects to position the District for shovel ready grant opportunities. (where financially possible)
- Work with other agencies to identify and secure funding opportunities. (Ongoing)

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~~Objective estimated completion date:~~

~~July 2022 start on next rate study for approval before July 2023~~

~~Every 3-5 years update the water and wastewater master plans.~~

~~Ongoing coordination with other agencies for project funding.~~

~~Within 1 year complete an assessment of the needs of the water and wastewater departments for the next 5-10 years.~~

~~Related metrics for deliverable tracking~~

- Objective description and general approach:-
- Objective Goals and Deliverables for the Goal:-
- Objective estimated completion date:-
- Related metrics for deliverable tracking:-

**56.2 WE WILL PERFORM A STUDY TO OUTLINE POTENTIAL SOURCES OF REVENUES**

~~-Objective description and general approach:-~~

Objective Description: ~~Work with Board to develop the scope of this~~

~~comprehensive study~~ ~~Objective description and general approach:-~~

~~to identify and~~ ~~Perform and analyze~~ ~~is and identify~~ ~~existing and potential~~  
~~new mission-related~~ ~~revenue sources~~ ~~for District departments.~~

~~Objective Goals and associated Deliverables~~ ~~Dates~~ ~~for the Goal:-~~

- ~~Determine entity(ies) to perform study~~

~~(FY2023/2024)~~

- ~~Determine funding mechanisms to fund for study~~

~~(FY2023/24)~~

- ~~Perform study and report to Board on~~

~~findings. (FY2024/25)~~ ~~Objective estimated completion date:-~~

~~Determination of entity to perform study and funding within 2 years~~

~~Perform study and report to board within 4 years~~

~~-Related metrics for deliverable tracking:-~~

~~---~~

~~-Objective Goals and Deliverables for the Goal:-~~

~~-Objective estimated completion date:-~~

~~-Related metrics for deliverable tracking:-~~

**56.3 WE WILL PERFORM A STAFFING ANALYSIS IN SUPPORT OF THE DISTRICT MISSION**

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~~Objective description and general approach:~~

~~Perform an analysis of current and future staffing needs to ensure adequate ability to support the Districts Mission.~~

~~Objective Goals and associated Deliverables/Dates for the Goal:~~

- ~~Assess current staffing and staff duties in all departments. (FY2022/23)~~
- ~~Determine future staffing needs for next 5 years for planned growth and expansions. (FY2023/24)~~
- ~~Analysis the current and future staffing needs and provide a recommendation based on results. (FY2024/25)~~

~~Objective estimated completion date:~~

- ~~Analysis of current staff and staff duties within 1 year~~
- ~~Analysis of future staffing needs and staff duties within 2 years~~
- ~~Recommendation for staffing changes within 2 years~~
- ~~Related metrics for deliverable tracking~~

...

~~Objective description and general approach:~~

~~Objective Goals and Deliverables for the Goal:~~

~~Objective estimated completion date:~~

~~Related metrics for deliverable tracking~~

~~56.4 WE WILL PERFORM A DISTRICT RATE STUDY THAT ALLOWS FOR MISSION CERTAIN-  
PROPER APPROPRIATE COMMUNITY RELATED NEEDS~~

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Objective description and general approach:

• Objective Goals and associated Dates for the Goal:

- Conduct a Board workshop to allow for broad discussion, clarity, potential and scope determination of this topic, providing direction to staff. (FY2022/23):

Objective Goals and Deliverables for the Goal:

...

Objective estimated completion date:

...

Related metrics for deliverable tracking

...

Objective description and general approach:

Objective Goals and Deliverables for the Goal:

Objective estimated completion date:

Related metrics for deliverable tracking:

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6.0 COMMUNITY AND STRATEGIC PARTNER RELATIONS

Objective description and general approach: We will be a leading public organization within the San Miguel community. We will facilitate mission related informational workshops, for the overall good of the community.

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**7.06.1 WE WILL ENHANCE THE CURRENT HIGH-LEVEL OF COMMUNITY ENGAGEMENT**  
Discuss expectations and Mission nexus at workshop)

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**F • LEADERSHIP**

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Objective Goals and associated Dates for the Goal: (Enhance in FY2022-23- Ongoing)

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Objective description and general approach:-

...

Objective Goals and Deliverables for the Goal:-

...

Objective estimated completion date:-

...

Related metrics for deliverable tracking

...

Objective description and general approach:-

Objective Goals and Deliverables for the Goal:-

Objective estimated completion date:-

Related metrics for deliverables

**6.2 WE WILL INCREASE OUR LEVEL OF PRESENCE AND INFLUENCE WITH COUNTY RELATED PLANNING AND DECISION MAKING** (Resource intensive to increase the current level of engagement. Discuss expectations at workshop)

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7.1 • Objective Goals and associated Dates for the Goal: (Enhance in FY2022-23- Ongoing)

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**6.16.3 WE WILL ACHIEVE CERTIFICATION FOR TRANSPARENCY FROM CSDA**

- (Requires full Board participation)

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**7.26.4 WE WILL PARTICIPATE IN OPPORTUNITIES FOR OUR COMMUNITY TO COLLECTIVELY PLAN AND STRATEGIZE FOR A PROSPEROUS FUTURE**

• **Objective Overview:**

- We will consider ways to help in a bigger way as the community core.
- We will allow use of our prime location for development of business partnerships and supporting of conditions and planning for growth and overall economic development, including groups like CSD, Chamber, Advisory Council, and other public groups formed for the overall good of San Miguel.
- **Objective Goals and associated dates for the Goal: (FY2022-23- Ongoing)**
- Work with Board of Directors to develop scope of effort and define costs. (FY2023-24)

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**6.5 WE WILL TAKE DELIBERATE STEPS TO COMMUNICATE THE GOOD NEWS ABOUT OUR DISTRICT AND COMMUNITY DISTRICT ACHIEVEMENTS**

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Objective Goals and associated Dates for the Goal: ~~Objective description and general approach:~~

- ~~• We will begin making more deliberate and formal press releases to a broad media set deliberately getting to word out of beneficial actions of the District. (FY2022-24)~~

~~Objective Goals and Deliverables for the Goal:~~

~~Objective estimated completion date:~~

~~Related metrics for deliverable tracking~~

- ~~Objective description and general approach:~~
- ~~Objective Goals and Deliverables for the Goal:~~
- ~~Objective estimated completion date:~~
- ~~Related metrics for deliverable tracking:~~

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Vision to Action Table Strategic Focus	Strategic Goals	Proposed Objective Dates
1.0 Water Resources	1.1 Water Supply Stabilization and Diversification 1.2 Maintain Strong Role in Groundwater Planning 1.3 Extended Water Storage 1.4 Begun long-term (20 yr.) Water Study	1.1 2023-ongoing 1.2 2023-ongoing 1.3 2023-25 1.4 2025
2.0 Wastewater	2.1 Opened and Operating New Wastewater Treatment Plant	2.1 2023-24
3.0 Fire Service	3.1 Complete Redistricting process with LAFCO/County 3.2 Opened and are Staffing new Fire Temporary Housing Unit 3.3 Fire apparatus Bay/Equipment 3.4 Remodel Fire Station 3.5 Enhance Fire Staffing	3.1 2022-24 3.2 2022-23 3.3 2023-24 3.4 2023-26 3.5 2023-24
4.0 Facilities	<del>4.1 Completed new WWTP Staff housing project</del> <del>4.2 Provide for County Sherriff Beat Station in District Facilities</del>	
4.5.0 Governance/Administration	4.5.1 We continue to work on maintaining a strong Board culture	4.1 2023-ongoing
5.6.0 Finance	5.6.1 Fiscally responsible water and wastewater rates 5.6.2 Revenue Sources Study 5.6.3 Staffing Analysis 5.6.4 Rate Study with community consideration	5.1 2022-23 -ongoing 5.2 2023-25 5.3 2022-23 5.4 2023-24
6.7.0 Community and Partner Relations	6.7.1 Enhanced Community engagement 6.7.2 Increased regional engagement, relations and influence 6.7.3 CSDA Transparency Certification 6.7.4 Participate in Community Planning 6.7.5 Proactively communicate the District news	6.1 20xx 6.2 20xx 6.3 2023-ongoing 6.4 2022-ongoing 6.5 2022-24