



BOARD OF DIRECTORS  
Connie S. Bracher  
Darel V. Davis  
Steven C. Farrell  
Robert Kinzel  
Kenneth L. Stone

GENERAL MANAGER  
Alan E. Clanin

To: Board of Directors  
From: Alan Clanin, General Manager  
Date: May 10, 2018  
Subject: Probationary Review of General Manager

The District Personnel Manual requires a performance evaluation be conducted as soon as practical prior to an employee's completion of the probationary period, and annually thereafter.

It has previously been the consensus of the Board to leave the format of the performance review for the General Manager in the format that has been used for the past several years.

Enclosed with this memo is a review of the goals and objectives established by the General Manager for the District and himself.





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To: Board of Directors **\*\*Confidential\*\***  
From: Alan E. Clanin, General Manager  
Date: May 10, 2018  
Subject: Probationary Performance Evaluation of General Manager

Following is the Self-Review of the General Manager, in which I review my Goals and Objectives for the past year. For the past several years, the Board has used this report as a tool for its review of the General Manager.

#### **District Goals/Objectives:**

- **Maintain Financial Condition of District** – It is our goal to maintain the District's financial condition. The District is now debt free and continues to maintain a solid financial position.
- **Drought Emergency:** With the current drought emergency declared over by the State of California and with CLAWA indicating no new restrictions on the amount of supplemental water available, our water revenues and expenses may however be impacted in the coming year based on the lower than expected annual precipitation. I am keeping an eye on the situation so that we can respond as necessary to the changing situation. The District has an ongoing Water Conservation Ordinance in place, so if it needs to respond to a reduced water supply, the tools are in place.
- **Retirement Plan:** CalPERS has been doing some restructuring of their investment policies which will cause higher employer rates spread over the next few years. The District has budgeted for the increases.
- **Water Rates:** Our last water rate increase of \$8.00 per month per service was in January 2017 following a 12-year span without any rate increases. With the system upgrades and maintenance that is needed to provide quality water service to our customers in the future, it may be necessary to impose a small and possibly perpetual increase in the current fiscal year to offset an increasing shortfall in Operating Revenues.
- **Personnel:** With the current staffing, we have a good group of employees who are working very well together. We have hired two full time field staff employees to fill vacant positions with the goal of succession and future needs of the District in mind.

We have previously maintained the current office staffing for many years. There is the Office Manager, and in years past, two full-time Customer Service Representatives

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(CSR) and one part-time mail clerk. With the District anticipating the retirement of the longest tenured CSR Lorraine "Rainey" O'Neill, our part-time mail clerk has been made full time and has begun training to potentially fill the position when required. The CSR's are training to take over some of the tasks handled by the Office Manager. This will not only ease the workload of the Office Manager but will allow for more coverage and versatility. With the changes made in staffing, our expenses can be expected to run higher than normal.

### **Planning, Scheduling and Completing Capital Improvement/Replacement Projects-**

Maintaining and improving the water infrastructure of the District is a priority. While the District's system is in excellent shape, we still have improvements that need to be planned and completed.

Projects and capital expenditures that are budgeted for in the current budget: While we have delayed some of these projects, there are some that have a high priority and are being pursued.

### **Current Capital Projects –**

- Lakeview Back Lot Line Main Replacement: There is approximately 2,500' of main to be replaced or installed for this project. This is the last significant section of main that needs to be replaced and still remains on the list of work to be done.
  - We have begun the installation process for the Lakeview Main Replacement Project. District Staff has installed the new 8-inch water main from Crest Forest Drive down the newly acquired easement to a pressure reducing vault. The tie-in valves have been installed on Lakeview Drive with the remaining water main to be completed by June 30, 2018.
- Well Development: The District is currently in the process of developing the Electra Drive Well site. The new well has been drilled to a depth of 580 feet. The water has been tested and the electrical service has been ordered. Further construction includes building a pump house and retaining wall, tying the pump piping into the existing water distribution system and adding water treatment processes if needed.
- Vehicle Replacement: In the current fiscal year, we have purchased one new service truck, with plans to purchase a second. We will order a new backhoe which will replace the 1990 Case 580K. A replacement service order vehicle will be budgeted for in the 2019/20 fiscal year.
- Billing/Financial System Software Update: The District is currently replacing the Comet Financial and Billing Software the district has been using for 30 years. Currently utility billing files are being prepared for conversion and the new software system is expected to be online before the end of the year.

### **Mid-range (1 to 6 years) Projects –**

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These projects are reviewed annually and are listed on page 5 of the annual audit report. These are items that have been identified to be completed in the next 5 - 6 years. The list contains items that are included in this year's budget. Depending on changing conditions and the economy some of these items may be delayed.

### **Long-Range Projects –**

- We are in the ongoing process of identifying the future needs of the District. Most of these needs are governed by changing regulations and water supply challenges. Some of our older mains are approaching 30 to 40 years of service. In approximately 20 to 25 years, the District should begin reevaluating the conditions of its water mains and developing a long-term replacement schedule based on the condition of the mains at that time. The expected life of the existing new mains is 100 years. The District should continue to build its reserves for the future upgrading and replacement of the water infrastructure.
- The District with its current boundaries and sphere of influence is not expected to have rapid growth other than through annexations. Most of the areas that may annex into the District would contribute to the overall water supply and would be expected to pay for any improvements that are required to serve the annexed area.
- Regulatory Compliance – The goal is to keep the District in compliance with existing and new regulations. These regulations will be mainly related to water quality, but an area that may have a large impact in coming years is environmental regulations that affect equipment and power consumption. The impact of future water quality regulations is unknown. Currently, there are no new regulations that require any changes to our treatment process. Based on anticipated future regulations, the District is in a good position to be able to comply with them.
- There is the possibility that there are environmental regulations that will impact District power usage. The District does not operate large pumps so it is expected that there will be minimal impact to the District. We periodically have efficiency testing performed on our pumps and update our pump motors as necessary.
- Long-Term Water Supply – Between the local water supply and the potential of the supplemental water supply that is available to the District from CLAWA, it would appear that the District has an adequate water supply for most years to come. However, there are several issues that threaten our long-term water supply.

The State of California continues to face serious water issues. The recurring droughts, infrastructure issues and the restrictions placed on the State's ability to pump water out of the Delta will continue to affect Southern California's water supply over the coming years.

Rainfall this winter has been better than in previous years but our local well production may still decline.

- CLAWA has a single pipeline that brings water from Silverwood Lake to the mountain area. If something were to make this pipeline unusable, the District may have to depend on local water supplies for several months. There is also an increasing

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concern statewide regarding the reliability of the State Water Project's water delivery system. Historically, local wells meet between 40% and 60% of our system's normal demand. If there were to be a major interruption to CLAWA's or the State Water Project's delivery system, we would need to enforce strict water conservation measures for up to a year.

### **Personal Development-**

- Area Water District/Company Relationships – Over the past six months, I have maintained relationships with the General Managers of Lake Arrowhead Community Services District, Running Springs Water District, Crestline Sanitation District and have improved relationships with Crestline-Lake Arrowhead Water Agency.
- Staff Relationships – Employee relationships and teamwork are a priority. The relationship and communication between the office and field staff has improved along with overall trust and morale. We are continuing to encourage staff interaction by having staff lunches and barbeques. Quarterly staff meetings have created opportunities to discuss employment issues with all the employees.
- Educational Training
  - Certification –The State Water Resources Control Board requires the Chief Operator of the District to hold Water Distribution 2 (D2) and Water Treatment 1 (T1) certifications. The District requires this for all field employees.
  - I currently hold D4 and T3 Certifications which meet and exceed the State requirements.
  - I also hold Grade 4 Plant Maintenance and Grade 4 Collection System Maintenance Certificates issued by the California Water Environment Association and a Grade 3 Waste Water Treatment Operator Certification issued by the State Water Resources Control Board.
- Water Industry Knowledge – Increase general and technical knowledge about the water industry.
- During the past seven months I have been enrolled in an ACWA-JPIA Leadership Essentials for the Water Industry Program. This year long course focuses on how to inspire employees, incorporate teamwork and create a more cohesive, functional and productive working environment.

### **Community Involvement –**

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I was inducted into Crestline-Lake Gregory Rotary Club in October 2017. I have made many new contacts with business and community leaders from our area and the county. I have become more involved in Rotary Projects/Activities. Being in Rotary has been a positive experience for me as well as positioning the District in an organization where it has positive exposure as an active member of the community.

#### **Personal Self-Evaluation of Past Six Months –**

The past year has been a positive year with personal growth and time acclimating to management. **Overall Grade B/B+**

##### ○ Capability/Knowledge of District – **Grade B**

My 28 years of overall water district experience, 16 years as a Director and a year and a half working as Assistant and General Manager has given me knowledge of the District's overall operation that is extensive. This experience has been useful when decisions needed to be made and I understood the appropriate actions that were needed. Understanding the District's policies and ordinances are important as we enter a year where we may be facing stricter water conservation.

While I still have a lot of room for improvement, I believe that a successful leader never stops learning. Understanding how the "system" works, having a basic understanding of "County Water District Law" and the "Government Code", why the District established certain policies and why things are done a certain way are invaluable in dealing with situations that arise. I am learning to see the big picture, recognize issues or situations when they arise, understand how they affect the District and to produce appropriate solutions and/or responses.

##### ○ Productivity – **Grade B+**.

I am constantly striving to push the District forward. While I still have room for improvement, I have been successful at getting work and projects done, and, in a timely manner.

I feel I have earned the trust of District Staff and have been accepted as General Manager. I will continue to work diligently with the incredible, dedicated District Staff to improve working relationships, teamwork, morale, safety, customer service and the image of the District.

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