

2011

COACHELLA VALLEY MOSQUITO &  
VECTOR CONTROL DISTRICT

STRATEGIC PLAN

## **GOVERNING BOARD OF DIRECTORS**

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# **COACHELLA VALLEY MOSQUITO & VECTOR CONTROL DISTRICT**

## **STRATEGIC PLAN 2011**

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**A MESSAGE FROM THE  
PRESIDENT and GENERAL MANAGER**

March 19, 2011

Dear Stakeholders, Trustees and Staff,

Organizations that want to survive and prosper must respond to the challenges that the environment and economy present. Typically, organizations experience long periods of incremental changes and, intermittently, they encounter periods of rapid and extensive adjustment as they respond to changes in surrounding world. Public and non-profit organizations are no different, it is essential to think, act, and learn strategically as never before.

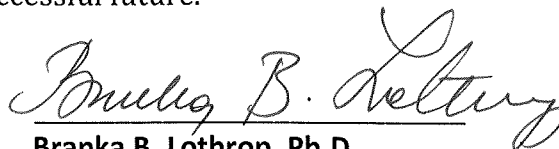
Through its 84 year history, the *Coachella Valley Mosquito and Vector Control District* (District) had been constantly changing and planning for success in insuring that the high standards of proactive services and protecting of the public health, of the residents of the Coachella Valley, from the vector borne viruses. These high standards *will continue* to be excellent by means of this Strategic Plan (Plan).

This Plan addresses key issues and presents guidelines on how to meet the District's professional, ethical, and legal obligations successfully. The Plan provides a disciplined effort to produce fundamental decisions and actions that shape and guide what the District is, what it does, and why it does it. The major goal of the Plan is to prepare the District for known issues and at the same time provide guidance in areas where future conditions may be more difficult to anticipate. The Plan offers periodic reviews and updates and is meant to be a "life document."

The Staff, the ad hoc Strategic Planning Committee (*Trustees Underwood, Cox, Howell, Trover, and Walker*), and the Strategic Planning Workshop Coordinator, *Dr. Beesley*, paved the road, with diligent preparation, to a successful Workshop. The Trustees and the Staff, under the direction of the Strategic Planning Workshop Coordinator, collaborated to produce this document, built on the District's strengths, to address weaknesses, provide opportunities on how to avoid threats, and help to prepare the District for a successful future.



**Sharon Lock,  
President**



**Branka B. Lothrop, Ph.D.,  
General Manager**

## **HISTORY**

The Coachella Valley Mosquito & Vector Control District (District) was formed in 1928 to combat eye gnats and initial efforts were directed towards control through pesticide applications. With the development of pesticide resistance, the District collaborated with the University of California to develop more sophisticated methods of surveillance and control, which continue to this day. The construction of the Coachella Valley Canal, in 1949, brought an abundance of water resulting in excessive irrigation runoff, mosquito production, mosquito-borne disease transmission, and the expansion of the District to include mosquito control. With the continued growth and development of the Coachella Valley, the District broadened to a full vector control agency and relocated to its current facilities. In 2005, the District added the Red Imported Fire Ant program, in response to the establishment of this imported public health pest. In 2006, the District completed a Bio-Control Facility to once-again reinforce the District's early commitment to research and apply the latest integrated methods to control mosquitoes. The District has continued and will continue to steadily expand and improve programs in response to community growth and development and the introduction of new vectors and/or vector-borne diseases.

## **BACKGROUND**

The District's most recent Strategic Plan (Plan) was developed in 2007. Since then, there have been multiple changes to the District to warrant a review of strategic issues and necessitate the development of a new Plan to guide the District forward. As a result, the District contracted with Special District Consulting to conduct a Strategic Planning Workshop with the Board of Directors, Management, and representative employees on March 19, 2011, at the District's administrative office, 43-420 Trader Place, Indio, California. This report reflects the items and agreements identified at the Workshop.

## **STRATEGIC PLANNING PROCESS**

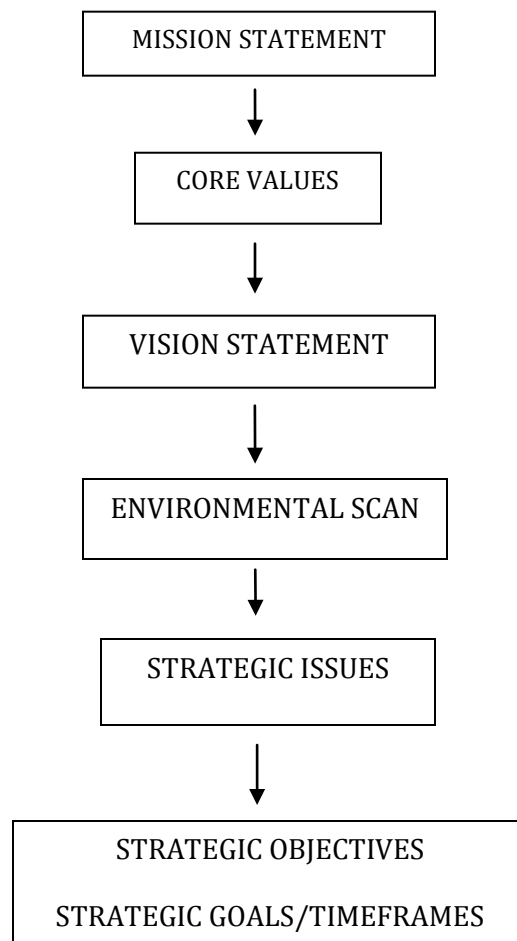
Strategic planning assumes that an organization will be responsive to local and/or regional growth and development and perhaps even other events which may require temporary or long term changes in services provided and/or actual service delivery. A Strategic Plan provides the framework for decision making over a three to five year period. It is a consensus-based approach based on a review of current conditions versus reasonably foreseeable events and determining whether current policies and programs are sufficient enough to meet these foreseeable challenges.

A Strategic Plan is based on identifying known or anticipated strategic issues that may affect services and/or service delivery. These strategic issues are then incorporated into Board/Management planning, decision-making, program monitoring, and performance measuring. The Strategic Plan process is achieved through discussions on the following inter-related subjects, as described below:

### **DEFINITIONS**

- **Mission Statement**: Expresses the organization's purpose and value to the community it serves. All activities within the District should be related to supporting the Mission Statement.
- **Core Values**: Core values represent the values that underlie our work, how we interact with each other and are the basic elements of how we go about our work. They are the practices we should be using every day in everything we do and should provide a foundation for the governance and management of the District.
- **Vision Statement**: Describes foreseeable programs and their potential impact. It provides a sense of priorities and direction during uncertain times and is utilized as a framework for planning and decision-making.
- **Environmental Scan**: Entails a review of the District's strengths, weaknesses, opportunities, and threats/concerns which may affect the District's abilities to provide services and/or require changes or modifications to services.

- Strategic Issues: Identifiable functions or events that may impact the District's ability to provide services, or require modifications or changes to service delivery. These issues can play a key role in governance, management, and operational planning.
- Strategic Objectives: Identifiable approaches or methods to addressing specific strategic issues. This may include short term, long term, focused or broad-brushed approaches.
- Strategic Goals: Specific actions, timeframes necessary for the completion of the goals. It is expected that periodic progress reports will be submitted by those responsible for completing the goals.
- Relationships: The following flow chart describes the descending order of these strategic steps:



## **MISSION STATEMENT & CORE VALUES**

### **MISSION STATEMENT**

“We are dedicated to enhancing the quality of life for our community by providing effective and environmentally sound vector control and disease prevention programs through research, development, and public awareness.”





## **CORE VALUES**

- Protecting the public health from vector-borne disease transmission;
- Ensuring professional delivery of services;
- Maintaining high ethical standards and open communications;
- Being environmentally conscientious;
- Having efficient, effective, responsive operations;
- Maintaining a professional, technical, and skilled staff; and
- Being financially stable.



## **VISION STATEMENT**

“We will continue to deliver integrated vector control services utilizing Best Management Practices.”

## **STRATEGIC ISSUES**

Strategic Issues and objectives clarify the District's understanding and expectations of the Board and Management's priorities and actions over a three to five year time frame. They are a by-product of the Mission Statement, influenced by the Core Values, and provide a focus or direction in order to achieve the stated Vision. The following seven issues were thought to play a critical significant role in future Board/Management decision-making, enabling continued program improvements, and ensuring continued progress toward a successful Vision over the course of the next five years.

The seven Strategic Issues are listed below, followed by discussions on specific objectives, strategies, and goals, all of which are presented in the Appendix.

1. Capital Improvement Programs
2. Financial Management
3. Human Resources/Risk Management
4. Research and Development
5. Board Governance
6. External Relations
7. Operations

## 1. CAPITAL IMPROVEMENT PROGRAMS



OBJECTIVE: Forecast needs to meet the changing services required to achieve the District's Mission Statement.

STRATEGY: Develop a needs assessment process for capital improvements.

### GOALS:

- 1.1 Establish elements for Capital Improvement Needs Assessment policy and procedure. This is essentially a one-time effort to develop a policy for future decision-making and is to be completed by November 2011.
- 1.2 Conduct a complete and accurate inventory of capital assets. This process is to be performed annually.
- 1.3 Complete inventory of space. This to be completed within 1 year.
- 1.4 Establish a list of future capital improvements and timetables. This should be conducted annually, in February, prior to the preparation of the fiscal budget.

## 2. FINANCIAL MANAGEMENT



**OBJECTIVE:** To be ethical, fiscally responsible, and law abiding in the stewardship of public funds to achieve the District's Mission.

**STRATEGY:** To maintain a complete tracking and reporting system to account for all present and future financial activities.

**GOALS:**

- 2.1 Produce timely financial reporting to achieve the objectives.
- 2.2 Forecast future expenditures and liabilities.
- 2.3 Forecast future revenues and fund balance.
- 2.4 Develop the capability to respond to external forces on revenue and expenditures, including:
  - a) Government regulations.
  - b) Natural disasters.
  - c) Market forces such as changing property values.
- 2.5 Provide fiduciary oversight by establishing and maintaining policies for asset management such as:
  - Investment Policy – established – to be reviewed annually
  - Fund Balance Policy – revise and establish – to be reviewed annually,
  - Purchasing Policy – established – to be reviewed when needed,
  - Audits Policy – to be developed by June 2012 - to be reviewed when needed
- 2.6 Revise and Establish Fund Balance Policy by June, 2011.

### 3. HUMAN RESOURCES/RISK MANAGEMENT



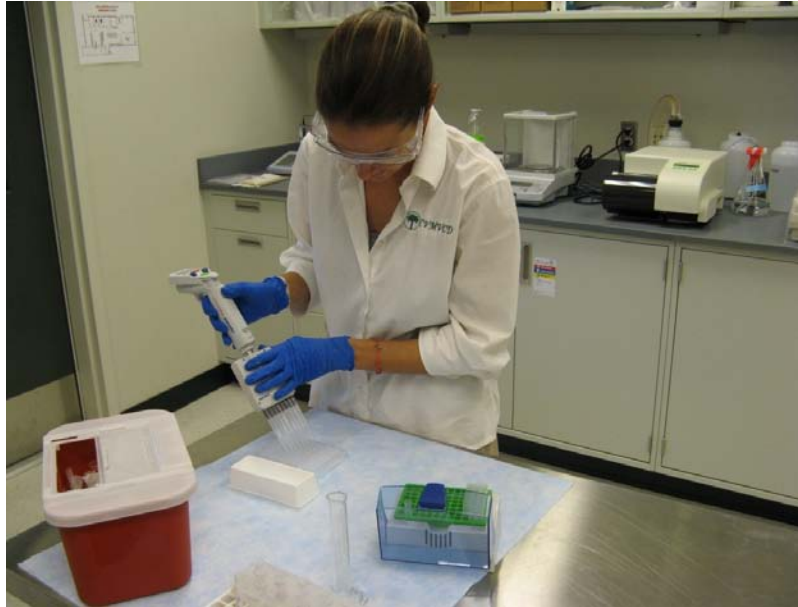
**OBJECTIVE:** To recruit, develop, and retain a professional, high quality, motivated workforce.

**STRATEGY:** Provide competitive compensation, a safe and dignified work environment, and educational and advancement opportunities by incorporating Best Management Practices.

#### **GOALS:**

- 3.1 Conduct a competitive compensation survey every three years.
- 3.2 Develop a safety and sensitivity training schedule for employees.
- 3.3 Continue to support education opportunities for staff.
- 3.4 Compliance with State and Federal regulations to maintain a professional work environment.
- 3.5 Develop and conduct employee satisfaction surveys every three years, beginning in fiscal year 2011-12.

#### 4. RESEARCH AND DEVELOPMENT



**OBJECTIVE:** To support the development, incorporation, and evaluation of control procedures and products that are environmentally sound, cost effective, and science-based.

**STRATEGY:** To utilize both internal and external research to ensure the District's Integrated Vector Management Program is effective, efficient, and responsive.

**GOALS:**

- 4.1 Develop and maintain a strong relationship with University of California researchers.
- 4.2 Actively participate in the Mosquito and Vector Control Association's Mosquito Research Foundation.
- 4.3 Utilize a research committee to prepare goals, develop Requests for Proposals (RFP's) and select research projects to be funded.

## 5. BOARD GOVERNANCE



OBJECTIVE: To have an ethical, knowledgeable, and responsive Board of Trustees.

STRATEGY: To provide a comprehensive orientation for new Board members and ongoing education and training opportunities in all aspects of the District's business, and require regulatory compliance for all trustees.

### GOALS:

- 5.1 Develop a comprehensive orientation program which includes field operations.
- 5.2 Identify core training programs for Board member development.

## 6. EXTERNAL RELATIONS



**OBJECTIVE:** Strengthen the community's and public agency's awareness and appreciation of the District's impact in regard to public health and lifestyle.

**STRATEGY:** Maintain current community outreach and enhance our collaborative relationships with other governing bodies.

### GOALS:

- 6.1 Identify, establish, and maintain working relationships with appropriate individuals within relevant agencies.
- 6.2 Prepare and submit an annual report to community leaders.
- 6.3 Improve and broaden the level of communicating the District's services, programs, and goals to the communities of the Coachella Valley.
- 6.4 Improve utilization of technology.
- 6.5 Improve professional reputation.



## 7. OPERATIONS



OBJECTIVE: Effectively and efficiently suppress vector and nuisance species.

STRATEGY: Achieve the objectives with integrated surveillance, control and assessment.

GOALS:

7.1 Apply and analyze surveillance data to model and predict vector populations, arboviral activity, and control measures.

7.2 Monitor and evaluate Integrated Vector Management Programs.

**APPENDIX A: STRATEGIC ISSUES, STRATEGIES & GOALS**

<b>STRATEGIC ISSUES, STRATEGIES &amp; GOALS</b>		<b>WHO</b>	<b>PRODUCT</b>	<b>WHEN</b>
<b>1. Capital Improvement Strategy:</b> Develop a needs assessment process for capital improvements.				
1.1	Establish elements for Capital Improvement Needs Assessment policy and procedure.	Fin Com, BOD Mgmt.	Board Policy	Nov 2011
1.2	Conduct a complete and accurate inventory of capital assets.	Mgmt.	Report	Annually
1.3.	Complete inventory of space.	Mgmt.	Report	Within 1 year
1.4	Establish a list of future capital improvements and timetables.	Mgmt., Fin Com	Report	Annually, by each February.
<b>2. Financial Management Strategy:</b> To maintain a complete tracking and reporting system to account for all present and future financial activities.				
2.1	Produce timely financial reporting to achieve the objectives.	Mgmt.	Reports	Ongoing
2.2	Forecast future expenditures and liabilities.	Mgmt.	Reports	Ongoing
2.3	Forecast future revenues and fund balance.	Mgmt., Fin Com	Reports	Ongoing
2.4	Develop the capability to respond to external forces on revenue and expenditures, including: a) Government regulations. b) Natural disasters. c) Market forces, such as changing property values.	Mgmt. BOD	Emergency Plan Reports	Within 1 year
2.5	Provide fiduciary oversight by establishing and maintaining policies for asset management such as: • Investment Policy – established – to be reviewed annually, • Fund Balance Policy – revise and establish by June 2011 – to be reviewed annually, • Purchasing Policy – established – to be reviewed when needed, • Audits Policy – to be developed by June 2012, • Cash Flow Policy– to be developed by June 2012, • Fixed Asset Policy– established – to be reviewed when needed,	BOD Mgmt.	Board Policies	June 2012 Annual compliance
2.6	Fund Balance Policy - Revise and Establish	BOD	Policy	June 2011

STRATEGIC ISSUES, STRATEGIES & GOALS			WHO	PRODUCT	WHEN
<b>3. Human Resources Strategy:</b> Provide competitive compensation, a safe and dignified work environment, and educational and advancement opportunities by incorporating Best Management Practices.					
	3.1	Conduct a competitive compensation survey.	Mgmt.	Report	Every 3 years
	3.2	Develop safety and sensitivity training opportunities and schedules for employees.	Mgmt.	Document	Annually
	3.3	Continue to support education opportunities for staff.	Mgmt.	Program	Ongoing
	3.4	Compliance with State and Federal regulations to maintain a professional work environment.	Mgmt.	Oversight	Ongoing
	3.5	Develop and conduct employee satisfaction surveys every three years.	Mgmt.	Survey	Initiate 2012, every 3 years
<b>4. Research &amp; Development Strategy:</b> Conduct both internal and external research to ensure the District's Integrated Vector Management Program is effective, efficient, and responsive.					
	4.1	Develop and maintain strong relationships with University of California researchers.	Mgmt.	Collaborate	Ongoing
	4.2	Actively participate in the Mosquito and Vector Control Association's Mosquito Research Foundation.	Mgmt. BOD	Participation	Annually
	4.3	Utilize a research committee to prepare goals, develop Requests for Proposals (RFP's) and select research projects to be funded.	Mgmt. BOD	Committee	Ongoing, Annually
<b>5. Board Governance Strategy:</b> To provide a comprehensive orientation for new Board members and ongoing education and training opportunities in all aspects of the District's business, and require regulatory compliance for all trustees.					
	5.1	Develop a comprehensive orientation program which includes field operations.	Mgmt. BOD	Report, Policy	Dec. 1, 2011 Annually
	5.2	Identify core training programs for Board member development.	Mgmt.	Report	Annually

STRATEGIC ISSUES, STRATEGIES & GOALS			WHO	PRODUCT	WHEN
<b>6. External Relations Strategy:</b> Maintain current community outreach and enhance our collaborative relationships with other governing bodies, municipalities, and agencies.					
	6.1	Identify, establish and maintain working relationships with appropriate responsible individuals within relevant agencies.	BOD Mgmt.	Develop Network	2-4 years
	6.2	Prepare and submit an annual report to community leaders.	Mgmt. BOD	Report	January 2012 Annually
	6.3	Improve and broaden the level of communicating the District's services, programs and goals to the communities of the Coachella Valley.	Mgmt.	Reports, Meetings	Ongoing
	6.4	Improve utilization of technology.	Mgmt.	Website, electronics	5 years
	6.5	Improve professional reputation.	Mgmt. BOD	Interactions	Ongoing
<b>7. Operations Strategy:</b> Achieve the objectives with integrated surveillance, control and assessment.					
	7.1	Apply and analyze surveillance data to model and predict vector populations, arboviral activity, and control measures.	Mgmt.	Report	Annually
	7.2	Monitor and evaluate Integrated Vector Management Programs.	Mgmt.	Report	Mid- 2012, then every 3-5 years

**APPENDIX B: LIST OF ATTENDEES**

**TABLE 1**

Karl Baker, Vice President  
Bruce Underwood, Dr. P.H., M.S.E., Strategic Planning Committee Chair  
Ellen Lloyd Trover, Trustee  
David I'Anson, Finance Manager  
Mike Martinez, Lead Vector Control Technician, CSEA Rep.  
Jeremy Wittie, Scientific Operations Manager

**TABLE 2**

Albert Keck, Trustee  
Gary Howell, Trustee  
Charles Rich, Trustee  
Branka B. Lothrop, PhD, General Manager  
Gregory White, Vector Ecologist  
Matthew Smith, Lead Supervisor

**TABLE 3**

Sharon Lock, President  
Doug Walker, Secretary  
Robert Cox, Treasurer  
Anita Jones, Human Resources Manager  
Edward Prendez, Information Technology Manager  
Veronica Montoya, Accounting Clerk, Teamsters Rep.