

June 25, 2025

TO: Chairman and Members of the Board of Directors

FROM: Robert C. Thompson
General Manager

SUBJECT: General Manager's FY 2025-2026 Work Plan

I am pleased to present my proposed Work Plan for Fiscal Year 2025-2026. The plan has been developed to support the Strategic Plan and is organized under four Strategic Planning categories: Business Principles, Environmental Stewardship, Wastewater Management, and Workplace Environment. The 21 goals proposed for next year include two goals from the previous year and new goals that will ensure our operations are safe and efficient. In addition, we will continue leading the way in innovation, financial management, and work force development while maintaining our level of service.

1. Business Principles

- **CIP Staffing Plan** – Create a Capital Improvement Program (CIP) staffing plan by December 31, 2025, to minimize Supplemental Engineering Services, improve succession planning, and streamline the project delivery process.
- **Customer Service Portal** – Complete the project Scope of Work, conduct a Request for Proposal, and award a contract to create a customer service portal by June 30, 2026. The portal will allow external stakeholders to access information, manage accounts, and interact with OC San's services to improve convenience and service efficiency.
- **Small and Replacement Projects Funding Process Improvement** – Develop a new process for funding small replacement and repair projects to create more transparency, efficiency, and budget control by December 31, 2025.
- **Operational AI Opportunities** – Identify and prioritize opportunities to optimize OC San administrative, operational and treatment processes through the application of Artificial Intelligence (AI). This may include leveraging historical SCADA data, CMMS data, LIMs data, and potentially visual information for an AI system that can prompt operators by June 30, 2026.

- **Cybersecurity** – Conduct a cyber penetration test and red team assessment of the process control systems by June 30, 2026.
- **Delinquent Fee Policies for Discharge Permits** – Update OC San ordinances and policies regarding delinquent fees and penalties for discharge permits by March 31, 2026.
- **Digital Asset Management** – Receive final technical memos for proposed asset database improvements and risk framework for major, critical assets by June 30, 2026.
- **Debt Financing** – Identify and pursue debt refunding opportunities that reduce costs for OC San and its ratepayers. If refunding criteria are met, complete the transaction by March 31, 2026.

2. Environmental Stewardship

- **Vehicle Mobility Study** – Conduct a study to right-size OC San's transportation fleet and support compliance with clean air standards by June 30, 2026.
- **Fats, Oil, and Grease (FOG) Outreach** – Develop updated Fats, Oils and Grease outreach and compliance materials for food service establishments within OC San service area by June 30, 2026.
- **Pretreatment Information Management System** – Develop a Scope for Work for a Pretreatment Information Management System to replace the existing system by June 30, 2026.
- **Industrial Waste Survey** – Update the Industrial Waste Survey program to utilize information management tools to gather business licensing information to more effectively identify sewer users that are required to have discharge permits by June 30, 2026.

3. Wastewater Management

- **Plant No. 1 Distributed Control System Human Machine Interface** – *(Carried over from FY 24/25)* Transition Plant No. 1 to the ABB Distributed Control System under project J-120 by March 31, 2026.

- **Property Management** – Conduct surveys of properties with identified encroachments or access limitations to OC San's property rights by June 30, 2026.
- **Supercritical Water Oxidization** – *(Carried over from FY 24/25)* Complete the six-month vendor demonstration of the six-ton Supercritical Water Oxidation unit by March 31, 2026.
- **Biosolids Deep Well Injection** – (1) Initiate Phase 1 biosolids deep well injection permitting process by October 31, 2025, and (2) develop the outreach Scope of Work for Phase 1 of the biosolids deep well injection program by June 30, 2026.
- **High Flow Exercise** – Develop and conduct a comprehensive high flow exercise by June 30, 2026, to evaluate Emergency Operation Center performance, processes, and operational efficiency. This exercise will simulate high influent wastewater emergencies and ruptures affecting the Santa Ana River Interceptor (SARI) trunkline to ensure preparedness and coordination among all relevant departments and agencies.

4. Workplace Environment

- **Physical Security Master Plan** – Develop a physical security master plan based on findings from past audits and surveys with a focus on mitigating risk, compliance with applicable regulations and standards, and enhancing security measures in OC San facilities and operations by June 30, 2026.
- **Operator Certification Support** – Develop and implement a wastewater laboratory and data science training curriculum to support wastewater operator certification by June 30, 2026.
- **Vocational Training** – Investigate partnership opportunities with vocational training institutions to enhance workforce sourcing efforts, with a focus on addressing hard-to-fill positions by June 30, 2026.