

STAFF REPORT

To: Coastside County Water District Board of Directors

From: Mary Rogren, General Manager

Agenda: November 12, 2025

Date: November 7, 2025

Agenda Title: Potential Board Training in Advance of Strategic Planning Workshop

For Discussion

The Board President asked to share information on an opportunity for the District's Board of Directors to participate in Board training that is different from the typical trainings that Board members attend. Attached is a proposal for your review from Darcy Burke, President and CEO of Watermark Associates, a business consulting firm specializing in working with public agencies.

Ms. Burke has 25+ years of experience in the water industry. Ms. Burke currently also serves as a Board member of the Elsinore Valley Municipal Water District (since 2018). Prior to leading Watermark, she was the Director of Public Affairs for the Municipal Water District of Orange County (MWDOC), former Executive Director for The Center for Water Education, Metropolitan Water District of Southern California's non-profit, and former Executive Director California Nevada Section, American Water Works Association (CA-NV-AWWA).

Ms. Burke is available to be in the area on December 8, 2025 and could conduct the in-person Board training on that date. The Strategic Planning Workshop will be held on January 12, 2026, so conducting the Board training before the workshop is timely. The cost for the Board training is \$5,975.

Attachment: Watermark Associates Proposal

To: Mary Rogren, General Manager
From: Darcy M. Burke, M.B.A.
Date: October 15th, 2025
Subject: *Board Training: “Fine Tuning the Gears”*
-Strengthening Leadership Continuity, Developing Long-Term Agency Resiliency, and Fostering Strategic Influence

41923 2nd Street, Suite 405
Temecula, CA 92590
951 294 3190
watermarkassociates.com

Purpose

Coastside County Water Agency’s (Agency) Board of Directors has enjoyed a long and unchallenged tenure. This institutional experience and knowledge has enabled the Agency to excel, overcoming operational challenges, supply variabilities, and regulatory constraints. The intent of any well-run organization like Coastside is to preserve institutional strength while preparing for an unreliable future. Watermark Associates will provide a half-day, board training entitled “Fine-Tuning the Gears.” This training will focus on three key areas:

- Strengthening Leadership Continuity,
- Ensuring Long-Term Agency Resiliency
- Fostering Strategic Influence

All three will align with the board’s leadership practices while addressing the realities of California’s special district environment and changing customer expectations.

Why This Training Matters Now

Long-serving boards often carry deep institutional wisdom but risk strategic, structured renewal. As new regulatory mandates continue to emerge and the political landscape tightens around water reliability and affordability, fine-tuning leadership systems becomes critical. This training focuses on refining—not reinventing—how your board governs, communicates, and influences outcomes. It will capture the culture your board has fostered as it has faced difficult decisions and learned to work well together.

Training Focus Areas

1. Succession Planning

Leadership transitions are inevitable. This portion of the workshop prepares the board to anticipate change, identify emerging leaders, and safeguard institutional knowledge. The goal: continuity without disruption.

2. Long-Term Agency Resiliency Strategy

Organizational resiliency is under pressure—from customer expectations, regulatory mandates, consolidation expectations, infrastructure aging, and supply vulnerability. This part of the training focuses on proactive risk management, integration of long-term planning tools, and communication strategies that reinforce public confidence and trust.

3. Building Relationships & Influence

Water policy success depends on trusted relationships. This discussion emphasizes effective advocacy, cultivating credibility across jurisdictions, and strategic engagement with policymakers and influencers to strengthen the agency's regional, state and federal presence.

Outcomes and Benefits

At the conclusion of the workshop, Coastside will have:

- A practical succession outline that aligns with the Agency's mission and realities.
- A clear understanding of current and emerging risks as well as potential mitigation pathways.
- An understanding of which strategic relationships including key political, policy stakeholders, regulatory staff, and influencers need to be developed.

Summary

Fine Tuning the Gears recognizes that experienced boards don't need overhaul—they need precision adjustment. This training honors your current well-functioning leadership while positioning the board to navigate the next four to five years with sharper focus. They will be better equipped in identifying and preparing the next board to lead and lead well.



*We don't reinvent the wheel; We fine-tune
the gears.*

**“Fine Tuning the Gears”
Strengthening Leadership Continuity,
Developing Long-Term Agency Resiliency,
& Fostering Strategic Influence**

**A Board of Directors
WORKSHOP PROPOSAL**

For

Coastside County Water District

PREPARED BY:



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OVERVIEW

At Watermark Associates we work with our clients, knowing that together we can solve problems, improve effectiveness and develop long-term stakeholder engagement. Our vast network of experts provides our clients access to the best and brightest in all facets of business.

HISTORY

Founded in 2007, Watermark Associates is a woman-owned, Limited Liability Corporation that was created to provide strategic organizational services and effective business, marketing, and communication strategies to public, private and non-profit organizations. We have worked extensively with public agencies, and private businesses across a myriad of industries, key stakeholder groups, regulatory agencies, consumers, legislators and non-profit organizations. Our relationships and structure have enabled us to offer extensive communications, public affairs, public relations, media management, policy training, crisis communications, website development, content development and marketing services in a unique and dynamic organizational offering: resulting in cost-effective service delivery. By using adaptive management resources, applying innovative solutions and subject matter expertise, we are able to provide customized deliverables in a timely and cost-effective manner.

PHILOSOPHY

Business is both an art, and a science. We believe that our clients are experts in their fields – they simply need assistance “doing business.” As a result, “We don’t reinvent the wheel, we fine-tune the gears.” Our business philosophy encourages discovery, fosters understanding, asks questions, leans in and listens. Business starts with “Why,” and that is just the beginning. There are more questions to be asked, more understanding to be gained, and effectiveness and efficiencies to be achieved along the way.



EXPERTISE

Our expertise is strategic intelligence. We apply it across a broad spectrum of disciplines including business, marketing and communications.

EXPERIENCE

Our experience delivers competitive advantages for our clients, across all sectors including for-profit, non-profit, and government.

FACILITATOR

Darcy M Burke, M.B.A., President & CEO, Watermark Associates, LLC.

Darcy Burke is an accomplished senior-level director with over twenty years of executive leadership, communication expertise, and management experience. She has a broad understanding of water issues, regional issues, legislative affairs, communications, public affairs, regulatory affairs, strategic planning, stakeholder development and engagement, volunteer recruitment and management, coalition building, business models, appropriate applications, and staff development. Darcy is knowledgeable and experienced in water regulations and the regulatory process in California and Nevada, as well as in executive leadership, senior management, communication and legislative program management, business development, and project management within the water and non-profit sectors.



Currently, Darcy serves as Treasurer on the Elsinore Valley Municipal Water District Board of Directors where she was elected in 2018 and re-elected in 2022. She serves as the Executive Director for the Urban Water Institute and was appointed and re-appointed to the United States Environmental Protection Agency's Local Government Advisory Committee where she Co-Chairs the Water Committee, PFAS Communication Committee, and Climate Adaptation Communication Committee. She earned her bachelor's degree in international economics and master's in business administration from Mount Saint Mary's University Los Angeles. Her graduate field study was completed in China and focused on energy.

APPROACH

You know your organization inside and out; Watermark Associates knows how to help you make your organization more efficient and effective. In one word, better. Together we help you achieve the success you and your team envision. Using best management practices and your consumer psychographic data, we develop customized workshop materials that will optimize your Board's effectiveness, improve internal and external communications, as well as help you meet your customer's expectations.

WORKSHOP OVERVIEW

Watermark Associates is pleased to provide Coastside County Water District (Coastside) with a Board workshop designed for seasoned and experienced directors that will **Strengthen Leadership Continuity, Develop Long-Term Agency Resiliency, and Foster Strategic Influence.**

This purpose of this half-day hour workshop is to assist Coastside with taking active steps towards preserving their institutional strength while preparing for an unreliable future. This training will focus on three key areas:

- Strengthening Leadership Continuity,
- Ensuring Long-Term Agency Resiliency
- Fostering Strategic Influence

All three will align with the board's leadership practices while addressing the realities of California's special district environment and changing customer expectations.

Long-serving boards often carry deep institutional wisdom but risk strategic, structured renewal. As new regulatory mandates continue to emerge and the political landscape tightens around water reliability and affordability, fine-tuning leadership systems becomes critical. This training focuses on refining—not reinventing—how the Coastside board governs, communicates, and influences outcomes. It will capture the culture the Coastside board has fostered as it has faced difficult decisions and learned to work well together.

TRAINING FOCUS AREAS

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Leadership transitions are inevitable. This portion of the workshop prepares the board to anticipate change, identify emerging leaders, and safeguard institutional knowledge. The goal: continuity without disruption.

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OUTCOMES AND BENEFITS

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SUMMARY

Fine Tuning the Gears recognizes that experienced boards don't need overhaul—they need precision adjustment. This training honors Coastside's current well-functioning leadership while positioning the board to navigate the next four to five years with sharper focus. The current board will then be better equipped in identifying and preparing the next board to lead and lead well.

Cost..... \$5,975*

* = Includes Friends & Family 15 % Discount

Watermark Associates looks forward to the opportunity continue to serve the needs of your organization and to support your efforts, meet your goals and increase stakeholder engagement. If you have questions on this proposal, feel free to contact Darcy Burker at your convenience by email at Dburke@Watermarkassociates.com or by phone at (951) 634-9019.

Thank you for your consideration,

Darcy M. Burke

Darcy M. Burke, M.B.A.

President & C.E.O.

Watermark Associates



TERMS

This proposal is an estimate of costs for proposed services rendered. A change of scope or additional services will result in an adjustment to these proposed fees and shall be provided to your company prior to any additional work commencing. Once approved, the initial fee payable to Watermark Associates is required. Thereafter, the monthly fee is due by the 1st of each month as outlined in the fee schedule. Any additional services require a fifty percent deposit to begin and balance upon completion of project and services rendered. Payments received after the 10th of the month will be assessed a \$250 late fee. All outstanding balances after the 20th of the month will be assessed an additional 3% fee.

APPROVED BY:



Date: _____

Date: October 29, 2025

Watermark Associates

41923 2nd Street, Suite 405

Temecula, CA 92590

