



Water Utilities Strategic Plan Update

Short-Term Results and Mid-Term Outlook

This presentation highlights key short-term accomplishments achieved over the past two years and outlines upcoming mid-term priorities that will guide our continued progress toward operational excellence and community service.



Strategic Plan Overview

Planning Structure

Five overarching goals guide Water Utilities operations, each supported by focused initiatives assigned to specific planning horizons since September 2023:

- **Short-Term:** Next one to two years
- **Mid-Term:** Three to five years
- **Long-Term:** Five to ten years

Current Progress on Short Term initiatives

- Completed: 35–40%
- In Progress: 50–55%
- Blocked: 5–10%

📌 Key Insight: The majority of short-term initiatives are either completed or actively advancing, with minimal stalled items—primarily due to external dependencies rather than internal capacity constraints.



GOAL 1

Deliver Infrastructure and Operational Excellence

1

Lead & Copper Rule Compliance

Advanced regulatory compliance measures to protect public health and meet federal water quality standards.

2

Backflow Prevention Portal

Implemented digital platform streamlining device testing, tracking, and compliance reporting.

3

Water Main Flushing

Standardized monitoring protocols ensuring consistent water quality across the distribution system.

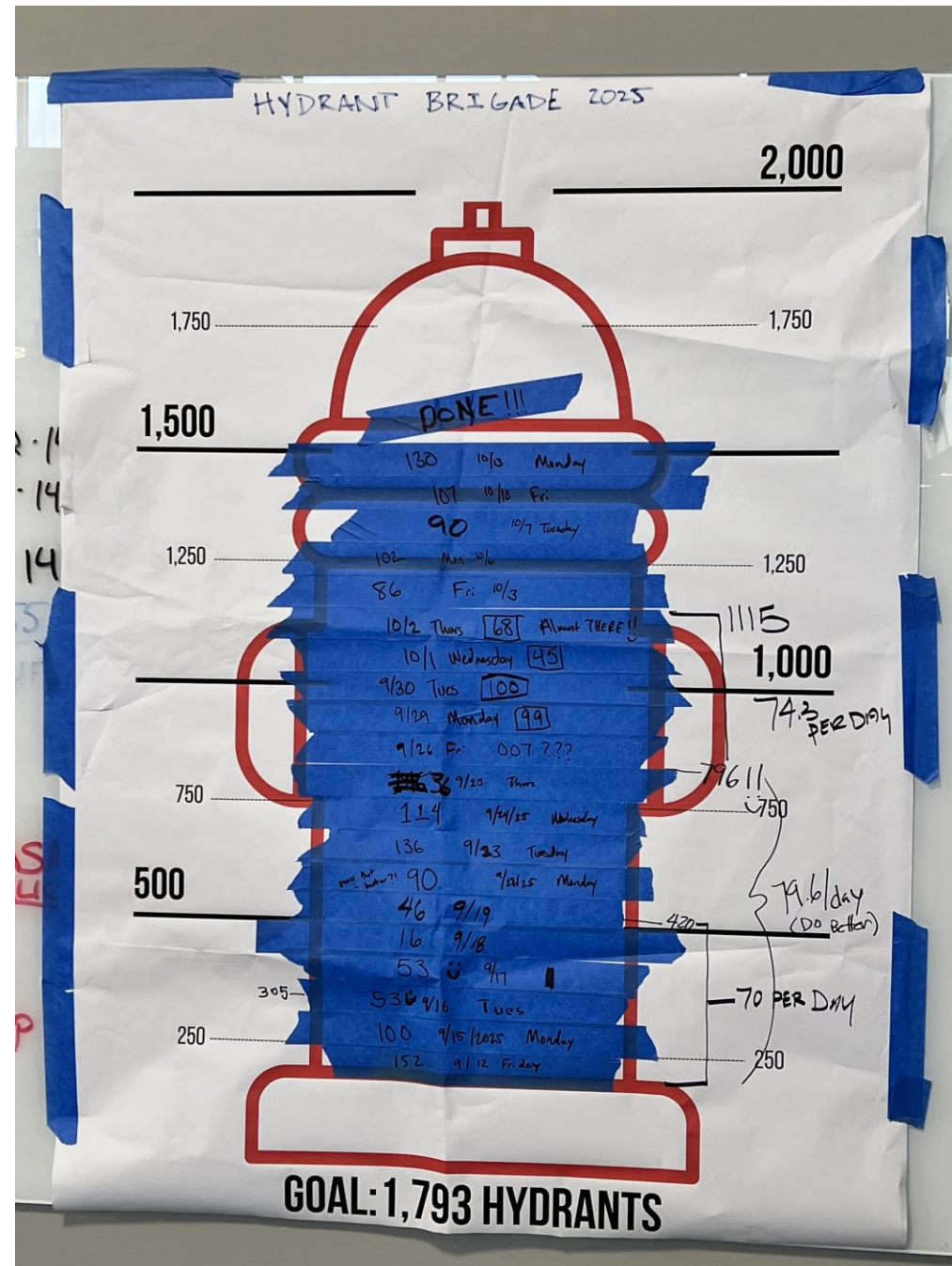
4

Asset Renewal Programs

Strengthened maintenance schedules and replacement strategies for critical infrastructure components.

Mid-Term Focus Areas

Moving forward, we'll prioritize ordinance updates to reflect current best practices, deploy advanced data and reporting tools for real-time decision-making, and continue strategic investments in system resiliency to withstand future challenges.





GOAL 2

Promote Community and Natural Resource Sustainability

Short-Term Achievements

- Water Demand Tracking

Maintained comprehensive monitoring of water demand patterns and system capacity to ensure adequate supply.

- AWWA Water Audit

Completed annual American Water Works Association audit, identifying efficiency opportunities and water loss metrics.

- Leak Detection Program

In the early-stage discussions internally around technological solutions available and how future state AMI capabilities could contribute to proactive leak detection protocols to reduce water loss and infrastructure damage.



Mid-Term Planning Priorities

Our sustainability roadmap includes comprehensive energy usage analysis with KPI development to measure progress, enhanced sustainability planning frameworks, and strengthened regional coordination with neighboring utilities to share resources and best practices.



GOAL 3

Provide Responsive Customer Service



Customer Survey

Completed comprehensive satisfaction assessment, gathering valuable feedback on service quality and communication effectiveness.



Complaint Tracking

Enhanced resolution processes with improved tracking, ensuring faster response times and better outcomes.



CIP Interactive Map

Launched public-facing Capital Improvement Plan map, providing transparency on construction projects and timelines.

Expanding Customer Engagement

Mid-term initiatives will explore expanded outreach tools including digital platforms and community forums, coupled with enhanced rate education programs to help customers understand billing and conservation opportunities.

Develop the Utility Workforce

Building Our Team

Investing in our workforce is essential to delivering excellence. Recent achievements include:

Organizational Assessment

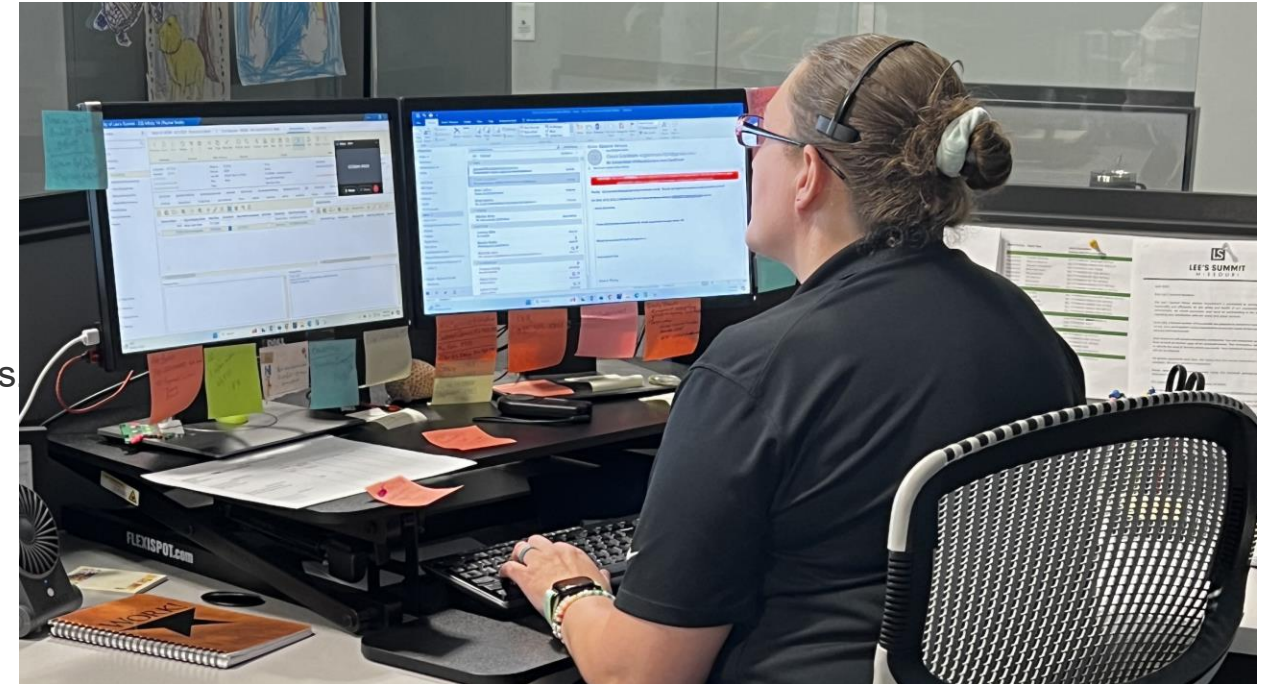
Comprehensive review of structure, roles, and capacity needs completed to optimize operations

Employee Satisfaction Survey

Gathered insights on workplace culture, identifying opportunities for improvement and recognition.

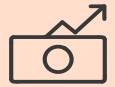
Leadership Development

Launched mentoring program and training initiatives to build internal leadership capacity.



Mid-Term Workforce Goals

- Succession planning strategies
- Expanded training partnerships with technical colleges
- Enhanced recruitment initiatives
- Professional development opportunities



GOAL 5

Maintain Financial Stability

100%

Policy Targets Met

Financial ratios achieved all established policy benchmarks, demonstrating sound fiscal management.

5yr

CIP Maintained

Five-Year Capital Improvement Plan actively managed and updated to reflect evolving infrastructure needs.

FY26

Budget Adopted

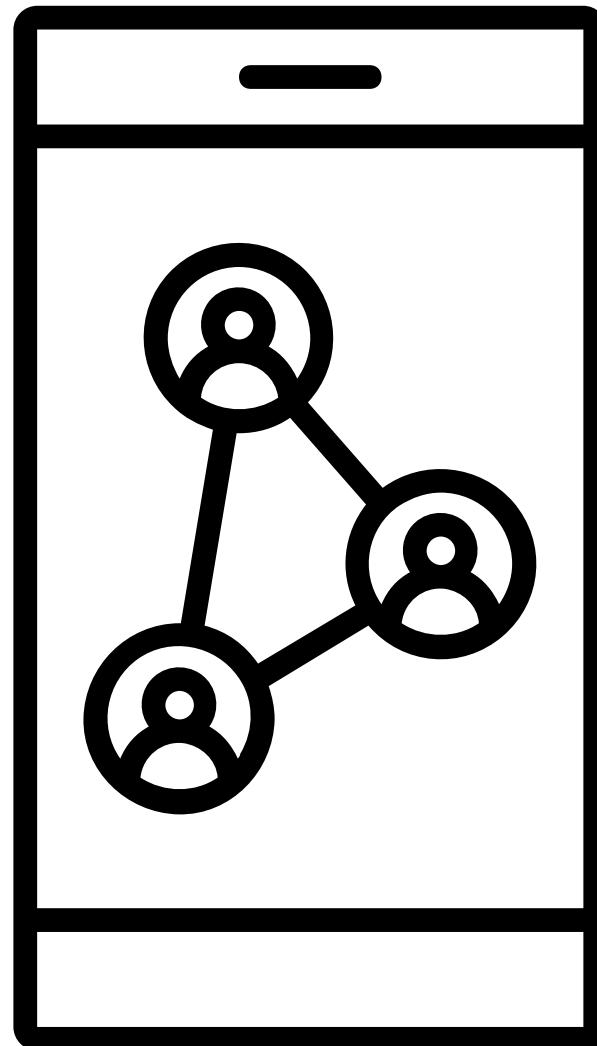
Comprehensive fiscal year budget approved, balancing operational needs with customer affordability.

Short-Term Financial Wins

We successfully completed a detailed Cost of Service analysis, providing clarity on rate structures and ensuring equitable distribution of costs across customer classes.

Mid-Term Financial Focus

Enhanced financial reporting tools will provide real-time visibility into budget performance, while ongoing cost monitoring ensures we maintain fiscal discipline and deliver value to customers.



Integrated Scorecard – Short-Term Initiatives

A comprehensive view of progress across all strategic initiatives reveals strong momentum and minimal barriers.

Completed

- Financial planning and rate modeling
- Customer surveys and engagement tools
- Workforce assessment programs
- Safety protocol enhancements

In Progress

- Ordinance updates and revisions
- Asset renewal programs
- Sustainability initiatives
- Energy efficiency projects

Blocked

- Document management system (awaiting Workday integration)

The single blocked initiative represents an external dependency rather than an internal capacity issue, and we're actively coordinating with technology partners to resolve the integration timeline.

Public Value Delivered

Every initiative and investment serves our fundamental commitment to the community. Our work delivers tangible value across five critical dimensions:



Public Health & Safety

Rigorous water quality standards and testing protocols protect community health through safe, reliable drinking water and wastewater treatment.



Reliable Services

Consistent water and wastewater services delivered 24/7, with minimal disruptions and rapid response to emergencies.



Transparent Communication

Open dialogue with customers through multiple channels, providing clear information about services, projects, and billing.



Financial Stewardship

Responsible management of public resources, ensuring affordable rates while maintaining system integrity and meeting regulatory requirements.



Workforce Investment

Developing skilled, dedicated employees who deliver excellence and build careers serving the community's essential needs.

Looking Ahead: Mid-Term Priorities

Building on our short-term successes, the next three to five years will focus on deepening our capabilities and expanding our impact.



Policy Updates

Complete remaining ordinance revisions to align with industry best practices and regulatory requirements.



Data Analytics

Expand performance dashboards and real-time monitoring tools for data-driven decision-making.



Sustainability

Advance energy efficiency initiatives and environmental stewardship programs across operations.



Workforce Growth

Continue investing in employee development, succession planning, and recruitment partnerships.

Our strategic plan provides the roadmap, but our dedicated team and community partnership drive the results. Together, we're building a more resilient, sustainable, and customer-focused water utility.

Appendix – Initiative Examples and Milestones

- **Examples of Short-Term Initiatives:**
 - Lead Service Line Inventory (2024)
 - APWA Accreditation (2024)
 - Customer Survey (2024)
- **Examples of Mid-Term Initiatives:**
 - Automated Meter Reading (AMI)
 - Energy audits and KPI development
 - Ordinance and code updates