

# Strategic Goals, Measures, Annual Priorities, and Indices

Strategic Plan  
Q2 Update

February 26, 2026



**NBU**® NEW BRAUNFELS  
UTILITIES

# Strategic Goals – (What We Aim to Do)

- **CUSTOMERS AND COMMUNITY**

We provide a customer-first focus and commit to innovative solutions to improve the customer experience.

- **PEOPLE AND CULTURE**

We care for our employees, build on our team-oriented culture, promote ethical behavior and prepare our team to meet the challenges ahead.

- **INFRASTRUCTURE AND TECHNOLOGY**

We maintain reliable and resilient systems through responsible planning, asset management, and innovative technologies that align with the strategic direction of the organization.

- **FINANCIAL EXCELLENCE**

We practice sound financial management to be responsible stewards of public funds.

- **SAFETY AND SECURITY**

We strive to place security and safety as the highest priorities for every employee and customer.

- **STEWARDSHIP**

We commit to preserve and protect community resources through planning, innovating, collaborating and educating.

## Mission

Strengthening our community by providing resilient essential services

+

## Vision

Be a trusted community partner dedicated to excellence in service

+

## Core Values

Safety, Team, Integrity, Culture, and Stewardship

**NBU** NEW BRAUNFELS  
UTILITIES

# FY 26/27 Strategic Measures – (How We Measure It)

Strategic Goal	Strategic Measure (Lagging Indicator)
Customer and Community	Improve the Customer Scores by 7% , and/or reaching the Texas average industry standard benchmark
Safety and Security	Achieve a Safety Meeting Compliance Rate $\geq$ 90% for all Departments
Safety and Security	Safeguard an OSHA Incident Rate $\leq$ 3 Incidents per 100 Employees per year
Financial Excellence	Meet or exceed A+/A1 from a minimum of two rating agencies annually
People and Culture	Sustain $\geq$ 89.3% Retention Rate for the Fiscal Year
Stewardship	Reduce NBU GPCD by 1% Based off the 2024 10-year Average in both FY26 & FY27
Infrastructure and Technology	Maintain a Three Year Rolling Average SAIDI in top 10% of Texas utilities or three-year rolling average <52.56 minutes (99.99% reliability)
Infrastructure and Technology	Ensure Technology System Reliability $\geq$ 98% uptime for production systems
Infrastructure and Technology	Achieve and Maintain an Infrastructure Leakage Index (ILI) $\leq$ 3.0 over a three-year rolling average
Infrastructure and Technology	Wastewater Treatment and Compliance Events- Maintain >98% Compliance

## Mission

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# FY 26/27 Strategic Measures – (How We Measure It)

## CUSTOMERS & COMMUNITY



### CUSTOMERS AND COMMUNITY

We provide a customer-first focus and commit to innovative solutions to improve the customer experience.

#### Strategic Measure (Lagging Indicator):

Improve the Customer Scores by 7% , and/or reaching the Texas average industry standard benchmark.

Q2
At Risk

#### Leading Indicator:

Speed to Answer:

**Green < 3 min.**

**Yellow 3 - 10 min.**

**Red > 10 min.**

#### Leading Indicator:

Real Time Customer Satisfaction Rate

**Green ≥ 85%**

**Yellow 84 - 70%**

**Red < 70%**

#### Leading Indicator:

First Contact Resolution

**Green ≥ 70%**

**Yellow 69 - 60%**

**Red < 60%**

				<u>Index</u>
Q1:	<b>2:13 min.</b>	-%	<b>79%</b>	<b>100%</b>
Q2:	<b>3:48 min.</b>	-%	<b>80%</b>	<b>83%</b>
Q3:				
Q4:				

#### Mission

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#### Vision

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#### Core Values

Safety, Team, Integrity, Culture, and Stewardship



# FY 26/27 Strategic Measures – (How We Measure It)

**SAFETY & SECURITY**



## SAFETY AND SECURITY

*We strive to place security and safety as the highest priorities for every employee and customer.*

### Strategic Measure (Lagging Indicator):

Safeguard an OSHA Incident Rate  $\leq 3$  Incidents per 100 Employees per year

Q2
.41

### Leading Indicator:

Monthly Safety Audits

Green  $\geq 10$

Yellow 9 - 7

Red  $\leq 6$

### Leading Indicator:

Safety Audit Findings Rate

Green  $\leq 5$

Yellow 6 - 7

Red  $\geq 8$

			<u>Index</u>
Q1:	11	1	100%
Q2:	14	2	100%
Q3:			
Q4:			

### **Mission**

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### **Vision**

Be a trusted community partner dedicated to excellence in service



### **Core Values**

Safety, Team, Integrity, Culture, and Stewardship



# FY 26/27 Strategic Measures – (How We Measure It)

**SAFETY & SECURITY**



## SAFETY AND SECURITY

*We strive to place security and safety as the highest priorities for every employee and customer.*

### Strategic Measure (Lagging Indicator):

*Achieve a Safety Meeting Compliance Rate  $\geq$  90% for all Departments*

Q2
97%

### Leading Indicator:

Quarterly Safety Meetings

**Green  $\geq$  6**

**Yellow 5**

**Red  $\leq$  4**

### Leading Indicator:

Audited Safety/Tailboard Meetings % Completion

**Green 100%**

**Yellow 99 - 95%**

**Red  $<$  95%**

			<u>Index</u>
Q1:	8	100%	100%
Q2:	12	100%	100%
Q3:			
Q4:			

### **Mission**

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+

### **Vision**

Be a trusted community partner dedicated to excellence in service

+

### **Core Values**

Safety, Team, Integrity, Culture, and Stewardship



# FY 26/27 Strategic Measures – (How We Measure It)

FINANCIAL EXCELLENCE



## FINANCIAL EXCELLENCE

We practice sound financial management to be responsible stewards of public funds.

### Strategic Measure (Lagging Indicator):

Meet or exceed A+/A1 from a minimum of two rating agencies annually

<b>Q2</b>
Fitch: AA- S&P: A+ Moody's: Aa1

### Leading Indicator:

Days Cash on Hand

Green  $\geq 170$

Yellow 169 - 140

Red  $< 140$

### Leading Indicator:

Debt Capitalization Ratio

Green  $\leq 48\%$

Yellow 47 - 54.5%

Red  $> 54.5\%$

### Leading Indicator:

Debt Service Coverage

Green  $\geq 3.5$

Yellow 3.4 - 2.4

Red  $< 2.4$

				<u>Index</u>
Q1:	214 Days	40.5	4.8	100%
Q2:	243 Days	39.5	4.8	100%
Q3:				
Q4:				

### Mission

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### Vision

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# FY 26/27 Strategic Measures – (How We Measure It)

PEOPLE & CULTURE



## PEOPLE AND CULTURE

We care for our employees, build on our team-oriented culture, promote ethical behavior and prepare our team to meet the challenges ahead.

### Strategic Measure (Lagging Indicator):

Sustain  $\geq$  89.3% Retention Rate for the Fiscal Year

Q2
94.82%

### Leading Indicator:

Monthly Stay Interviews

Green  $\geq$  3.5

Yellow 3.49 – 2.5

Red  $<$  2.5

### Leading Indicator:

New Hire Interviews avg. score of 3.5/5

Green:  $\geq$  3.5

Yellow: 3.49 – 2.5

Red:  $<$  2.5

### Leading Indicator:

Learner Satisfaction Rate

Green  $>$  3

Yellow 3 - 2

Red  $<$  2

				<u>Index</u>
Q1:	4.5	4.3	4.5	100%
Q2:	4.5	4.7	4.7	100%
Q3:				
Q4:				

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# FY 26/27 Strategic Measures – (How We Measure It)

## STEWARDSHIP



### STEWARDSHIP

We commit to preserve and protect community resources through planning, innovating, collaborating and educating.

#### Strategic Measure (Lagging Indicator):

Reduce NBU GPCD by 1% Based off the 2024 10-year Average in both FY26 & FY27

Q2
132

#### Leading Indicator:

Meaningful Engagement for Water Reduction

**Green ≥ 3 engagements**

**Yellow 2 engagements**

**Red ≤ 1 engagements**

#### Leading Indicator:

Conservation Related Initiatives

**Green ≥ 6 initiatives launched (balanced across seasons, at least 3 water-focused)**

**Yellow 5 – 4 initiatives launched**

**Red < 3 or fewer initiatives launched**

			<u>Index</u>
Q1:	1.3* (4 performed)	2	50%
Q2:	3.7	2	100%
Q3:			
Q4:			

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# FY 26/27 Strategic Measures – (How We Measure It)

INFRASTRUCTURE  
& TECHNOLOGY



## INFRASTRUCTURE AND TECHNOLOGY

We maintain reliable and resilient systems through responsible planning, asset management, and innovative technologies that align with the strategic direction of the organization.

### Strategic Measure (Lagging Indicator):

Maintain a Three Year Rolling Average SAIDI in top 10% of Texas utilities or three-year rolling average <52.56 minutes (99.99% reliability)

Q2
48.76

#### Leading Indicator:

Customer Feeder Count

Green ≤ 1200

Yellow 1201 - 1300

Red > 1301

#### Leading Indicator:

Tree Trimming

Green > 98,785 feet per month

Yellow 98,785 – 85,000 feet per month

Red < 85,000 feet per month

#### Leading Indicator:

Locate Accuracy

Green > 99.99%

Yellow 99.98 - 99.90%

Red < 99.90%

				<u>Index</u>
Q1:	1,208	165,667 ft	100%	89%
Q2:	1,222	102,610 ft	100%	89%
Q3:				
Q4:				

### Mission

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# FY 26/27 Strategic Measures – (How We Measure It)

INFRASTRUCTURE  
& TECHNOLOGY



## INFRASTRUCTURE AND TECHNOLOGY

We maintain reliable and resilient systems through responsible planning, asset management, and innovative technologies that align with the strategic direction of the organization.

### Strategic Measure (Lagging Indicator):

Ensure Technology System Reliability  $\geq$  98% uptime for production systems

Q2
98%

	<u>Leading Indicator:</u> Tech Systems Monitoring Green > 99% Yellow 99 - 98% Red < 98	<u>Leading Indicator:</u> Critical Platforms past EoL Green < 5% Yellow 6 - 9% Red > 9%	<u>Leading Indicator:</u> End Point Device Protection Green > 99% Yellow 99 - 98% Red < 98%	<u>Leading Indicator:</u> Critical Hardware past EoL Green < 5% Yellow 6 - 9% Red > 9%	<u>Index</u>
Q1:	99.9%	3.5%	99.7%	0%	100%
Q2:	99.6%	3.6%	99.3%	0%	100%
Q3:					
Q4:					

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# FY 26/27 Strategic Measures – (How We Measure It)

INFRASTRUCTURE  
& TECHNOLOGY



## INFRASTRUCTURE AND TECHNOLOGY

*We maintain reliable and resilient systems through responsible planning, asset management, and innovative technologies that align with the strategic direction of the organization.*

### Strategic Measure (Lagging Indicator):

Maintain an Infrastructure Leakage Index (ILI)  $\leq 3.0$  over a three-year rolling average

Q2
2.3

### Leading Indicator:

> 80% Maintenance Schedule Compliance for Water Operations – Distribution System

Green  $\geq 80\%$

Yellow 79 - 66%

Red  $< 66\%$

		<u>Index</u>
Q1:	84%	100%
Q2:	84%	100%
Q3:		
Q4:		

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# FY 26/27 Strategic Measures – (How We Measure It)

INFRASTRUCTURE  
& TECHNOLOGY



## INFRASTRUCTURE AND TECHNOLOGY

We maintain reliable and resilient systems through responsible planning, asset management, and innovative technologies that align with the strategic direction of the organization.

### Strategic Measure (Lagging Indicator):

Wastewater Treatment and Compliance Events- Maintain >98% Compliance

Q2
99.99%

### Leading Indicator:

Solids Levels +/- 20% – (> 90% of Time)

**Green > 90%**

**Yellow 60-89%**

**Red < 60%**

### Leading Indicator:

>80% Maintenance Schedule Compliance for Water Treatment and Compliance – WW Facilities

**Green ≥ 80%**

**Yellow 66 - 79%**

**Red < 66%**

			<u>Index</u>
Q1:	96%	86%	100%
Q2:	92.6%	90.3%	100%
Q3:			
Q4:			

### Mission

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### Core Values

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# FY 26 Annual Priorities – (Company Focused Projects)

## Customer Experience

- Implement target optimization CS initiatives that impact response time, Quality Assurance, Operation/Technology Efficiencies, and Communication Adoption

Q1:	On Track
Q2:	On Track

## Asset Management

- Establish NBU's Asset Data and Information Standards

Q1:	On Track
Q2:	On Track

## Project Management

- Implement PMIS for Capital Projects for Support Services

Q1:	On Track
Q2:	On Track

## Technology Modernization

- Select Financial System

Q1:	On Track
Q2:	On Track

### Mission

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# FY 27 Annual Priorities – (Company Focused Projects)

## Customer Experience

- Implement targeted optimization CS initiatives on Response Time, Quality Assurance, Operations/Technology Efficiencies and Communication Adoption.

## Technology Modernization

- Implement Phase 1 of the Financial System
- Select Customer Information System

## Strategic Plan

- Update Strategic Plan

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## QUESTIONS

### **Mission**

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