



Meeting Date:	<u>August 28, 2025</u>	Agenda Type:	<u>Presentation Items</u>
From:	<u>David Guerrero</u> Resource Strategy Manager	Reviewed by:	<u>Darrin Jensen</u> Director of Enterprise Project Management Office
Submitted by:	<u>David Hubbard</u> Chief Administrative Officer	Approved by:	<u>Ryan Kelso</u> Chief Executive Officer

RECOMMENDED ACTION: Presentation on the Plan to Update the Current Strategic Plan for Fiscal Year 2028

BACKGROUND

This project shall review and develop enhanced Mission, Vision, Core Values, Guiding Principles, Strategic Goals, and Metrics. To do this, New Braunfels Utilities (“NBU”) shall embark on a five-phase approach that shall guide the work to update the strategic plan with a view ten (10) years forward. A large portion of this approach is gathering and analyzing data from NBU employees, customers, leadership, the Citizen Advisory Panel (CAP), and the Board concerning what NBU's strengths and weaknesses are, along with future threats. The collected data will then be used to reevaluate NBU’s Mission, Vision, Core Values, Guiding Principles, and strategic goals, along with updated metrics to measure progress toward accomplishing the work outlined in the strategic goals.

The five-phase process consists of:

- (1) Initiating:** to define the purpose and value of the project;
- (2) Planning:** involving stakeholder engagement, data review, and benchmarking;
- (3) Executing:** where the mission, vision, core values, and goals will be refined alongside risk assessments and control measures;
- (4) Monitoring and Controlling:** to align the organization through communication and internal input; and
- (5) Finalization and Implementation Readiness:** culminating in a launch strategy, monitoring framework, and mechanisms for continuous improvement. Together, these phases ensure the ten-year strategic plan is grounded, actionable, and aligned with NBU’s long-term vision.

FINANCIAL IMPACT

The total estimated financial impact is \$105,000.00 for Vendor Services for the strategic planning facilitation effort, which is budgeted as part of the Fiscal Year 2026 budget.

LINK TO STRATEGIC PLAN

Customers and Community

People and Culture

Infrastructure and Technology

Financial Excellence

Safety and Security

Stewardship