

Fiscal Year 2028 Strategic Plan Development

FY28-FY38

• March 26, 2026



NBU NEW BRAUNFELS
UTILITIES

FY28 Strategic Plan Development

- **Welcome and Introduction**
- **Current State**
- **Future State**
- **Then and Now**
- **How it Works**
- **Sample**

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

Welcome and Introduction

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Current State

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FY26-27 Strategic Goals (Current State)

- **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.

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FY26-27 Strategic Goals (Current State)

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

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FY26-27 Strategic Goals (Current State)

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

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Future State

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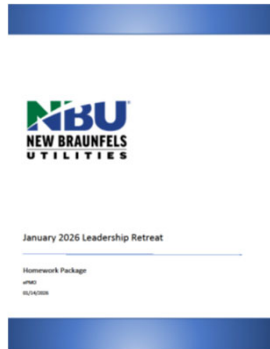
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Strategic Plan Development (Future State)



NBU Strategic Plan Customer Survey

1. Introduction

The document presents a strategic analysis of the comprehensive feedback gathered during the recent 2025 survey. Its purpose is to inform the future focus, strategic vision, and corporate responsibilities identified in employee responses to inform and guide NBU's strategic planning process. The report serves as a key tool for leadership, providing a structured, organized, and clear view of the responses from the perspective of the most valuable asset in our workforce. The insights contained herein should be used as critical strategic assets, offering clear guidance for organizational alignment and improvement.

The analysis begins with an evaluation of employee perceptions of NBU's Vision, Values, and Core Values. Insights identified include: (1) employee perceptions of NBU's Vision, Values, and Core Values are generally positive, indicating a strong alignment with the organization's mission and values. (2) There are opportunities for improvement in certain areas, including communication, employee safety training, and service reliability. The most commonly cited areas of concern, based on the survey results, are: (1) communication, (2) employee safety training, and (3) service reliability. (3) The analysis concludes with a list of recommendations for leadership to address the identified areas of concern.

2. Overview of NBU's Vision, Values, and Core Values

The strategic vision of any organization is deeply intertwined in its alignment between its stated Vision, Values, and Core Values. These three elements are critical to the organization's success. When the organization aligns its vision, values, and core values to its mission, it creates a clear path for progress. The vision outlines the direction of the organization while the values and core values define the behavioral and cultural norms that guide the organization's actions.

3. Key Findings Summary

Employees identified several positive words and concepts within the survey that they feel best represent and describe. These terms consistently reflect a commitment to service, safety, and community.

Consistency and Reliability: These terms were consistently highlighted as positive reflections that connect employees' work to a larger mission.

Resilience and Reliability: The concept of providing resilient and essential services was frequently cited as a key finding. In response to this, the report includes a list of recommendations for NBU to focus on the safety of work and customer service issues that are "bigger than ever".

NBU Strategic Plan Customer Survey



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NBU NEW BRAUNFELS UTILITIES

Strategic Plan Development (Future State)



Workforce capacity, systems, and processes must keep pace with growth to sustain reliable service and a healthy culture.



NBU must consistently earn community trust through clear, stable, and disciplined decision-making over time.



Customers must experience dependable service, predictable rates, and clear explanations for decisions that affect them.



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Strategic Plan Development (Future State)

- Approach
 - Framework first



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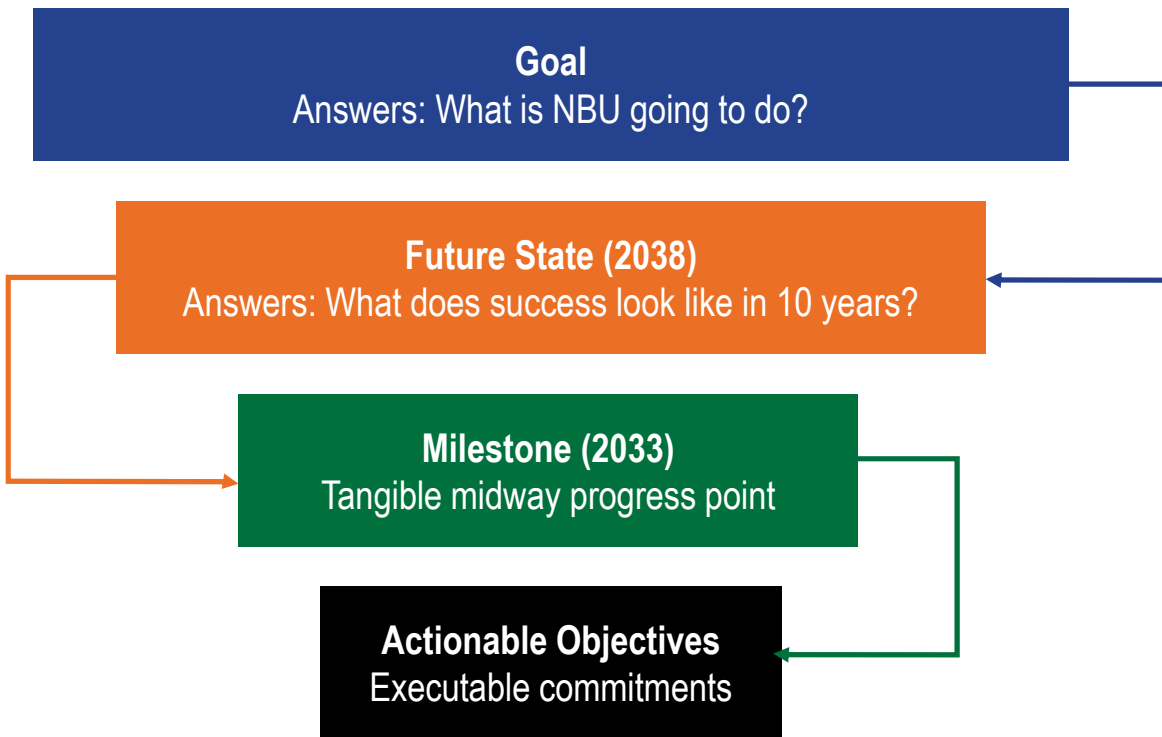
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NBU NEW BRAUNFELS
UTILITIES

Strategic Plan Development (Future State)

- What our Strategic Goals may now look like:



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Strategic Plan Development (Future State)

GOAL: X

- Future State (2038)
- Milestone (2033)
 - Actionable Objectives
 - ✓ Lagging Indicators
 - ✓ Leading Indicators



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Then and Now

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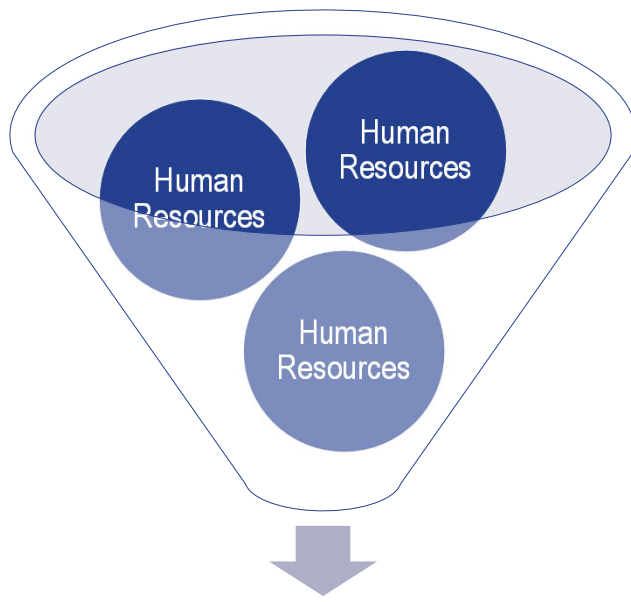
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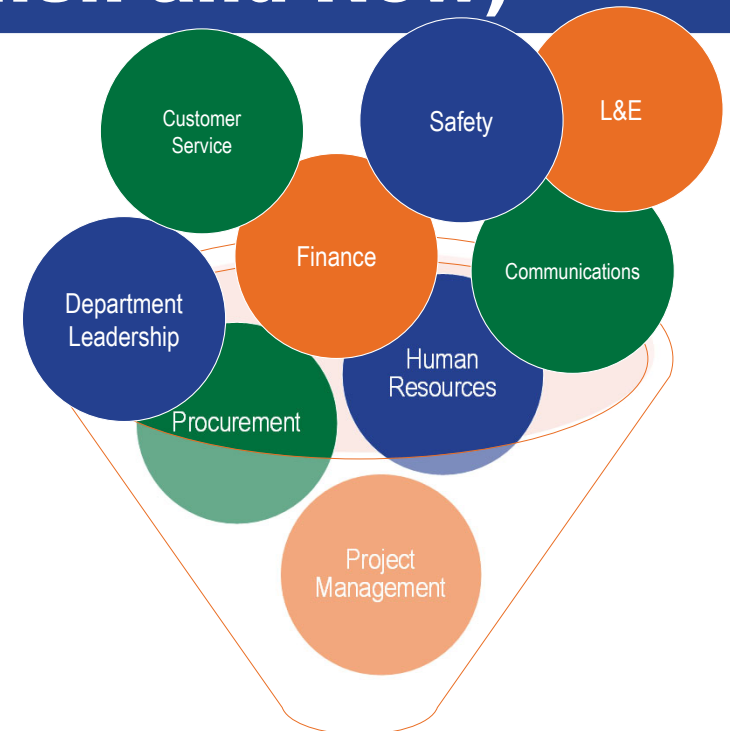
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Strategic Plan Development (Then and Now)



PEOPLE AND CULTURE



CULTIVATE A FUTURE-READY WORKFORCE

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Strategic Plan Development (Then and Now)

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.

FY26-27

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

Leading Indicator:

Monthly Stay Interviews

Green ≥ 3.5

Yellow 3.49 – 2.5

Red < 2.5

Leading Indicator:

New Hire Interviews avg. score of 3.5/5

Green: ≥ 3.5

Yellow: 3.49 – 2.5

Red: < 2.5

Leading Indicator:

Learner Satisfaction Rate

Green > 3

Yellow 3 - 2

Red < 2

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Strategic Plan Development (Then and Now)

GOAL: CULTIVATE A FUTURE-READY WORKFORCE

FY28-38

Future State (2038): NBU is Texas' premier utility employer, able to reliably attract, develop, and retain the technical and leadership talent required to operate and grow resilient utility systems under sustained growth, regulatory pressure, and extreme events.

Milestone (2033): By 2033, NBU will have transitioned from "reactive hiring" to "proactive talent cultivation," evidenced by a 90% internal readiness rate for critical leadership and technical roles

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Strategic Plan Development (Then and Now)

GOAL: CULTIVATE A FUTURE-READY WORKFORCE

- Future State (2038)
- Milestone (2033)
 - Actionable Objectives
 - Lagging Indicators
 - Leading Indicators

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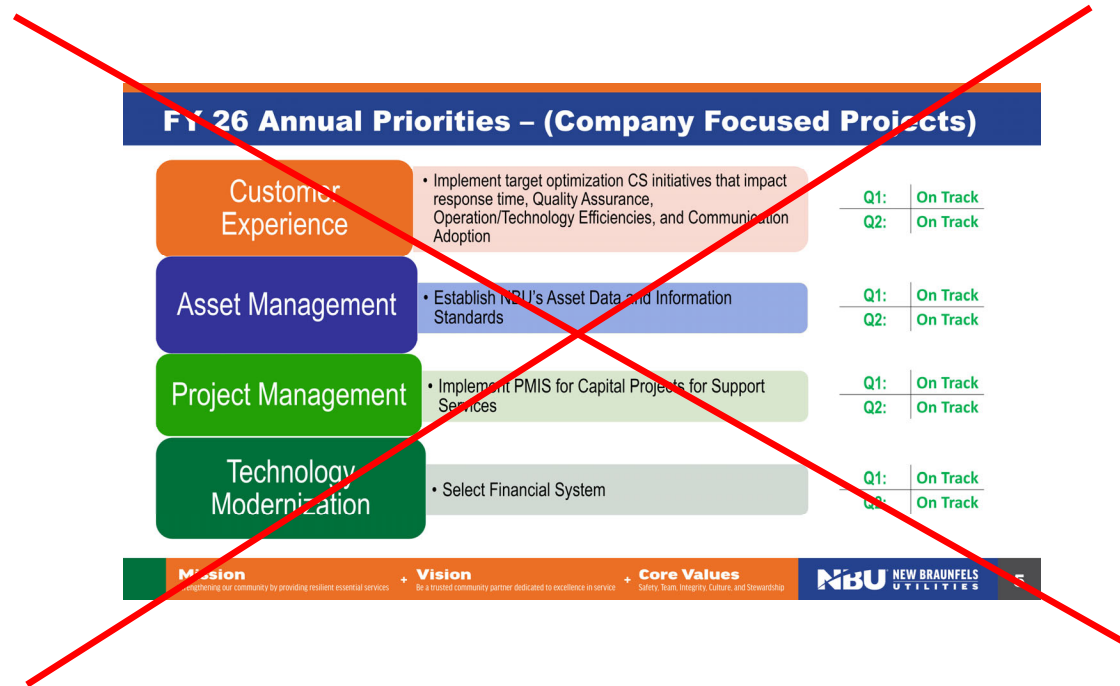
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Strategic Plan Development (Then and Now)

Actionable Objectives

A set of objectives that NBU can focus on to reach the 2033 Milestone and beyond.



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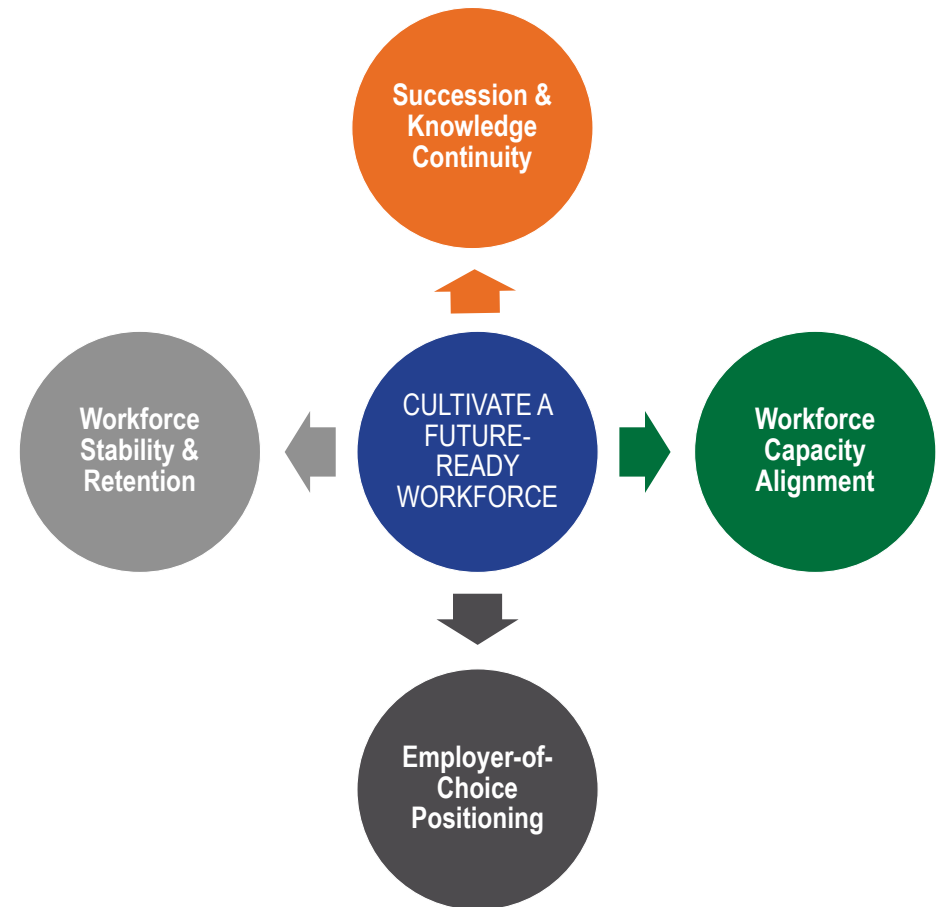
Strategic Plan Development (Then and Now)

❑ Succession & Knowledge Continuity
Sustain leadership and technical continuity by institutionalizing succession and knowledge transfer initiatives.

❑ Workforce Stability & Retention
Proactive management of workload, development, and employee wellbeing/engagement

❑ Employer-of-Choice Positioning
Offer clear expectations and credible paths for people to build long-term utility careers at NBU.

❑ Workforce Capacity Alignment
Staffing plans integrated with growth forecasts, capital plans, and regulatory demands



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How it Works

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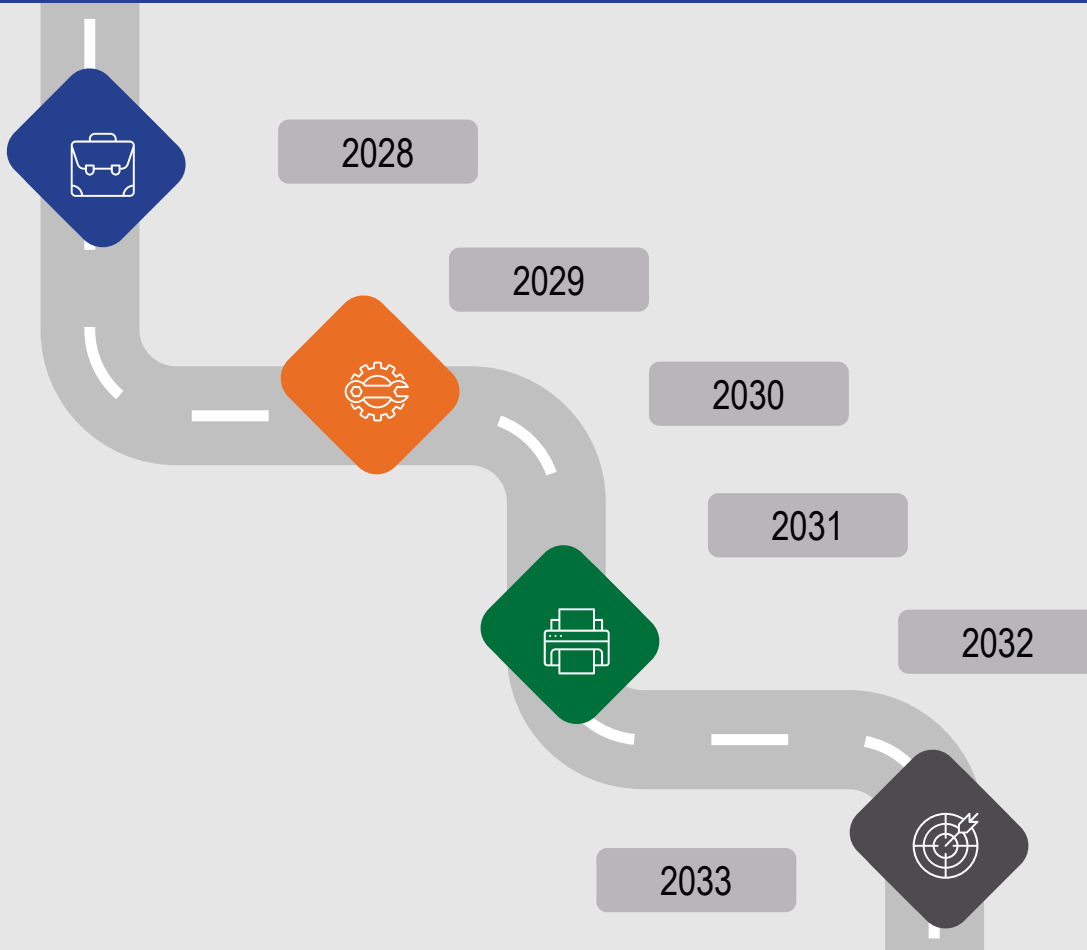
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Strategic Plan Development (How it Works)



● **SUCCESSION AND KNOWLEDGE CONTINUITY**

Sustain leadership and technical continuity by institutionalizing succession and knowledge transfer initiatives.

● **WORKFORCE STABILITY AND RETENTION**

Proactive management of workload, development, and employee well-being/engagement

● **EMPLOYER OF CHOICE POSITIONING**

Offer clear expectations and credible paths for people to build long-term utility careers at NBU.

● **WORKFORCE CAPACITY ALIGNMENT**

Staffing plans integrated with growth forecasts, capital plans, and regulatory demands

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Strategic Plan Development (Sample)

CULTIVATE A FUTURE-READY WORKFORCE

FY28

Succession & Knowledge Continuity

Workforce Capacity Alignment

Lagging Indicators:

≥ 90% **Critical Roles Succession Planned**
Sustain leadership and technical continuity by institutionalizing succession and knowledge transfer initiatives.

>30 **Project Delays Due to Staffing**
Count of CIP projects delayed >30 days, citing "Resource Availability" as the root cause

Leading Indicators:



Critical Role Readiness Coverage



Knowledge Transfer Participation



Bench Strength Index



Projects per Project Manager



Documents Ready for Purchasing



Contractor Ratio

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Strategic Plan Development

Questions?

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