



FY 2022 Strategic Plan Year End Results



Overview

- Tier 1 Strategic Goals and Measurements
- FY 2022 Balanced Score Card
- Year End Performance Measures Report

Tier 1 Strategic Goals and Measurements

KEY FOCUS AREAS	TIER 1 GOALS	MEASUREMENTS
CUSTOMERS AND COMMUNITY	Recognized as a trusted community partner dedicated to excellence in service	Customer satisfaction survey
PEOPLE AND CULTURE	Develop and retain an engaged and ethical workforce	Employee engagement survey
INFRASTRUCTURE AND TECHNOLOGY	Maintain organizational reliability and resiliency	Percentage of technological up-time, SAIDI, percentage of completion for water/wastewater capital improvement projects
FINANCIAL EXCELLENCE	Maintain a competitive bond rating	Ratings as assigned by recognized financial rating agencies
SAFETY AND SECURITY	Provide a safe and secure environment	OSHA incident rate
STEWARDSHIP	Be a responsible steward of our resources	One water plan

Fiscal Year 2022 Strategic Plan Performance Measures

Balanced Score Card



KEY FOCUS AREA	TIER 1: GOAL	TIER 2: STRATEGY	TIER 3: TACTIC	MEASUREMENT	YEAR END RESULT
Customers and Community	Trusted community partner dedicated to excellence in service	Enhanced customer experience results in increased customer satisfaction	Conduct Customer Satisfaction Survey	Achieve a >67.3% (3 year average of Great Blue Research's national benchmark) customer service satisfaction rating on the compilation of organizational characteristics	Goal accomplished. The survey was conducted and NBU met the measure. NBU Rating 80.31%.
People and Culture	Develop and retain an engaged and ethical workforce	Succession planning retains organizational knowledge and provides career growth and development opportunities	Employee Engagement Road Map Implementation	Develop core skill set NBU seeks in managers; source and implement a minimum training of at least one course per quarter, per manager	Goal accomplished: Three-year training plan was developed and feeds into the engagement roadmap. NBU conducted four leadership level training courses throughout the fiscal year and completed the FY 2022 Employee Engagement Survey in April.
Infrastructure and Technology	Maintain organizational reliability and resiliency	Organizational resiliency includes addressing aging infrastructure, finding innovative solutions and planning for additional growth	Achieve (Maintain) regulatory compliance for Water Services	Complete 80% of baseline water/wastewater projects and stay within +/- 15% projected budget for each project	Goal is on target. 94% Baseline projects are substantially complete. Estimated projected FY 2022 spend for baseline projects at 109%.
			Implement Asset Management Roadmap	Implement Phase 2 of Roadmap	Goal accomplished. Asset Management Policy finalized. Asset Management framework drafted for Fleet department.
		Managing data and information enhances communication, sound decision-making and efficiency	Implement Project Management Roadmap	Implement Phase 2 of Roadmap	Goal accomplished.
			Maintain electric system reliability (SAIDI, CAIDI, SAIFI)	Maintain a three-year rolling average SAIDI in top quartile of Texas utilities or 3 year rolling average <52.56 minutes (99.99% reliability)	Goal accomplished. As of July 31, the current three-year rolling average is 44.21 minutes.
			Investment in technology supports consistently resilient and efficient business operations	Maintain Information Technology Systems Reliability at 90% uptime for production systems.	Sustain 90% uptime standard, each month
Financial Excellence	Maintain a competitive bond rating	Responsible financial management practices ensure economic sustainability	Maintain Cost per Customer	Achieve a cost per customer of = or <\$348.03	On target. Reported through June 30, 2022, the combined cost per customer is \$283.79.
Safety & Security	Provide a safe and secure environment	Customer and employee demographics and data are maintained in a secure manner	Provide a safe work environment for our employees	Manage at-fault safety violations greater than \$250 vehicle or equipment damage less than 3.31%	Goal accomplished. Vehicle/Equipment Incident Rate is 1.43%.
		Safety and security are continually and consistently emphasized within the workforce	Establish and implement plan to retro-fit old and outdated security equipment throughout NBU	Complete security upgrades on a minimum of two high risk locations each fiscal year	Goal accomplished.
Stewardship	Be responsible steward of our resources	Planning for sustained natural resources includes innovative approaches	Bring NBU one water team together to confirm work to complete Regional One Water Road Map Report and Plan	Implement cross organizational working groups	Goal accomplished. Over the last 10 months, the Director of Customer Solutions activated ongoing meetings with the One Water working group and is working with GBRA and the City of New Braunfels to negotiate a working partnership document for One Water between the three foundational members. This is in addition to the Service extension policy working group that has been created to address a One Water approach to Municipal Utility Districts.

FY 2022

Tier 1 Goals/Performance Measures
Fourth Quarter Updates – Year End Results

Customers and Community

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Recognized as a trusted community partner dedicated to excellence in service	Conduct Customer Satisfaction Survey	Achieve a >67.3% (three-year average of Great Blue Research's national benchmark) customer service satisfaction rating on the compilation of organizational characteristics	Goal accomplished The survey was conducted and NBU met the measure NBU Rating 80.31%

Financial Excellence

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Maintain a competitive bond rating	Maintain Cost per Customer	Maintain cost per customer of = or <\$348.03	On target Reported through June 30, 2022, the combined cost per customer is \$283.79

People and Culture

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Develop and retain an engaged and ethical workforce	Implement NBU Employee Engagement Roadmap	Develop core skill set NBU seeks in managers Source and implement training for NBU managers, targeting a minimum of one course per quarter	Goal accomplished Three-year training plan was developed and feeds into the engagement roadmap NBU conducted four leadership level training courses throughout the fiscal year and completed the FY 2022 Employee Engagement Survey in April

Stewardship

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
<p>Be responsible steward of our resources</p>	<p>Bring NBU One Water team together to confirm work to complete Regional One Water Road Map Report and Plan and present plan to the NBU Board of Trustees</p>	<p>Implement cross organizational working groups</p>	<p>Goal accomplished</p> <p>Over the last 10 months, the Director of Customer Solutions activated ongoing meetings with the One Water working group and is working with GBRA and the City of New Braunfels to negotiate a working partnership document for One Water between the three foundational members. This is in addition to the Service extension policy working group that has been created to address a One Water approach to Municipal Utility Districts</p>

Infrastructure and Technology

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Maintain organizational reliability and resiliency	Achieve regulatory compliance for Water Services	Complete 80% of baseline W/WW projects and stay within +/- 15% projected budget for each project	On target 94% of Baseline projects are substantially complete Estimated projected FY 2022 spend for baseline projects at 109%

Infrastructure and Technology

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Maintain organizational reliability and resiliency	Maintain electric reliability (SAIDI, CAIDI, SAIFI)	Maintain a three-year rolling average SAIDI in top quartile of Texas utilities or three year rolling average <52.56 minutes (99.99% reliability)	Goal accomplished As of July 31, the current three-year rolling average is 44.21 minutes

Infrastructure and Technology

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Maintain organizational reliability and resiliency	Implement Asset Management Road-map	Implement Phase 2 of Asset Management Road-map: 1. Finalize Asset Management Policy 2. Draft Asset Management Framework for one area	Goal accomplished Asset Management Policy finalized Asset Management framework drafted for Fleet department

Infrastructure and Technology

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Maintain organizational reliability and resiliency	Implement Project Management Road-map	Implement Phase 2 of Project Management Road-map: 1. Establish Center of Excellence	Goal accomplished

Infrastructure and Technology

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Maintain organizational reliability and resiliency	Maintain Information Technology Systems Reliability at 90% uptime for production systems	Sustain a 90% uptime standard each month	Goal accomplished Year-end average uptime is 99.96%

Safety and Security

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Provide a safe and secure environment	Provide a safe work environment for our employees	Manage at-fault safety violations greater than \$250 vehicle or equipment damage less than 3.31%	Goal accomplished Vehicle/Equipment Incident Rate is 1.43%

**Safety is my
Responsibility.**

Safety and Security

TIER 1: GOAL	TIER 3: TACTIC	PERFORMANCE MEASUREMENT	FOURTH QUARTER UPDATE
Provide a safe and secure environment	Establish and implement plan to retro-fit old and outdated security equipment throughout NBU	Complete security upgrades on a minimum of two high risk locations	Goal accomplished

Thank you!