



# Guadalupe-Blanco River Authority

2023-2028 Strategic Plan



## INTRODUCTION

The Guadalupe-Blanco River Authority (GBRA) engaged Baker Tilly to work with its leadership team and key stakeholders to develop a new comprehensive strategic plan regarding the allocation of resources to support the effective delivery of critical water resource management, and water and wastewater treatment services to the 10-county (Kendall, Comal, Hays, Caldwell, Guadalupe, Gonzales, DeWitt, Victoria, Calhoun and Refugio counties) watershed. The planning process and final document provides a plan with a five-year horizon.

The plan will include:

- Compelling statements of commitment and promise along with a set of concrete, specific, achievable and time-bound strategic goals, objectives and operational initiatives in support of the commitment and promise of the GBRA.
- A graphical strategy map and a structured deployment plan to serve as an implementation guide for the next five years, including the establishment of specific priorities, accountabilities, completion dates and key performance indicators.
- Transform the conceptual goals of the visioning process into realistic, achievable targets.
- Provide a process that allows general alignment and focus to foster a sense of cohesion as to GBRA's strategic direction with considerations of all divisions and geographic areas.
- Chart an effective and innovative course of action for GBRA's future, setting priorities and maximizing innovative opportunities.
- Serve as a way to organize and prioritize GBRA initiatives and resources to achieve specific goals within the next five years with specific performance measures.



## PURPOSE

The strategic planning process focused primarily on what GBRA needs to focus on to achieve its overall vision for the future rather than the day-to-day “hows” of Authority operations and service delivery.

Good strategic planning addresses the issues that challenge the organization today and, more importantly, those that will challenge it tomorrow. The planning process was, therefore, an exercise in collective foresight, as GBRA leadership and stakeholders worked together to clarify what future success looks like considering existing and expected future challenges.

## THE PLANNING PROCESS



An inclusive and collaborative planning approach was applied in the development of the GBRA Strategic Plan.

That process included:

- Initial planning and kickoff meetings with members of the senior management team.
- Discussion of the “business landscape” for the GBRA in terms of the operating environment, critical issues, funding streams, policy priorities, regulatory considerations, and related topics.
- Logistical planning and coordination for the strategic planning workshops for GBRA leadership.
- Conducted interviews with six (6) internal focus groups and eight (8) external focus groups.
- Development of a graphical strategy map illustrating the linkages between the commitment, promise, and strategic goals and objectives and strategic plan document, and creation of a public-facing strategic plan document.
- Deployment of the Strategy road map and schedule.
- Facilitated the development of key performance indicators for each strategic objective.



- Development of strategic communication and change management plans.
- Identification of technology tools for the management and measurement of the strategic plan and a strategic performance reporting model.

## **STAKEHOLDER ENGAGEMENT**

GBRA leaders recognized that the validity and acceptance of the strategic plan depended on the quality of the involvement, support, and effort of multiple stakeholders in the Authority's long-term success. Accordingly, the planning process involved an extensive outreach effort to engage directly with a diverse set of internal and external stakeholders to establish a foundation for the plan's development.

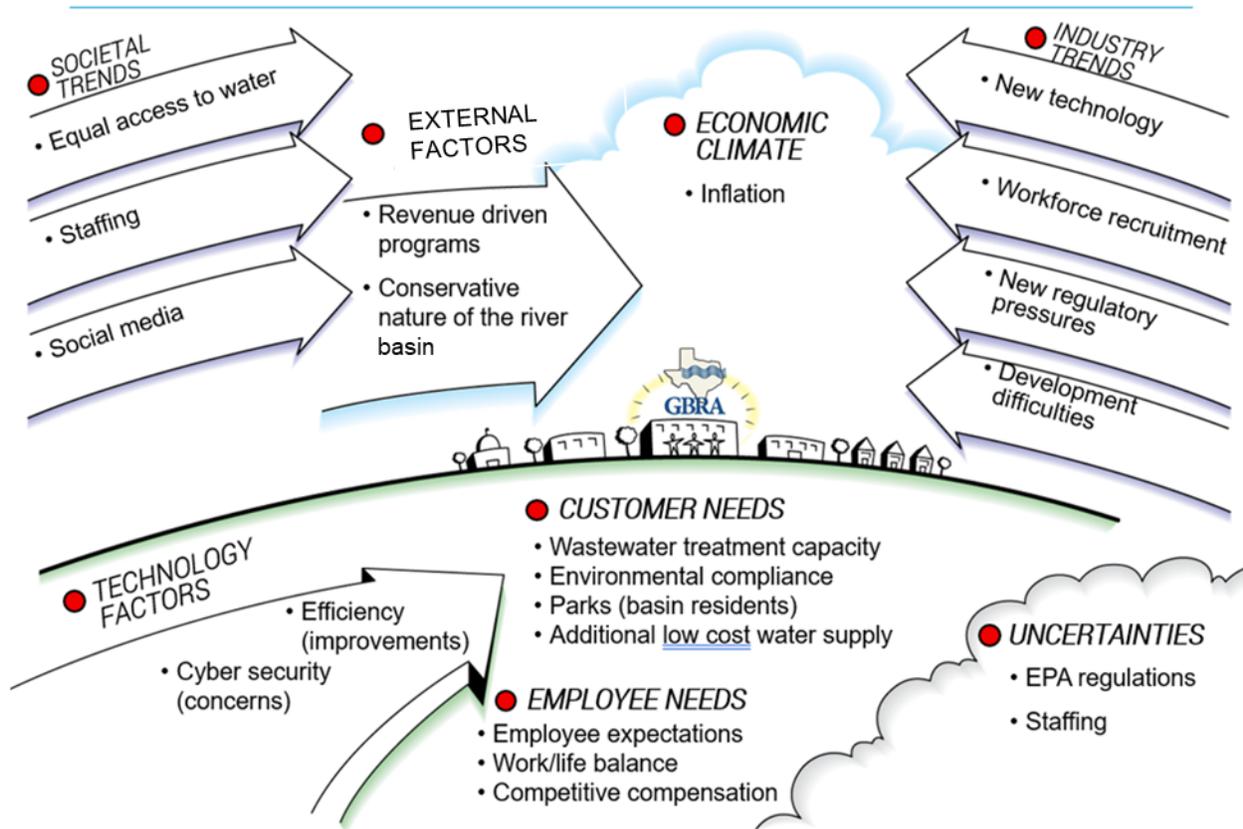
Focus group sessions were conducted with:

- GBRA senior leadership and staff focus groups in administration, engineering and development, environmental science, finance and operations
- City and County leaders in the 10-county watershed
- Representatives of non-profit organizations, economic development corporations and partnerships in the 10-county watershed
- Regional elected officials

The following information provides a high-level summary of the input and perspectives received from each of the noted stakeholder groups.

# ENVIRONMENTAL SCAN

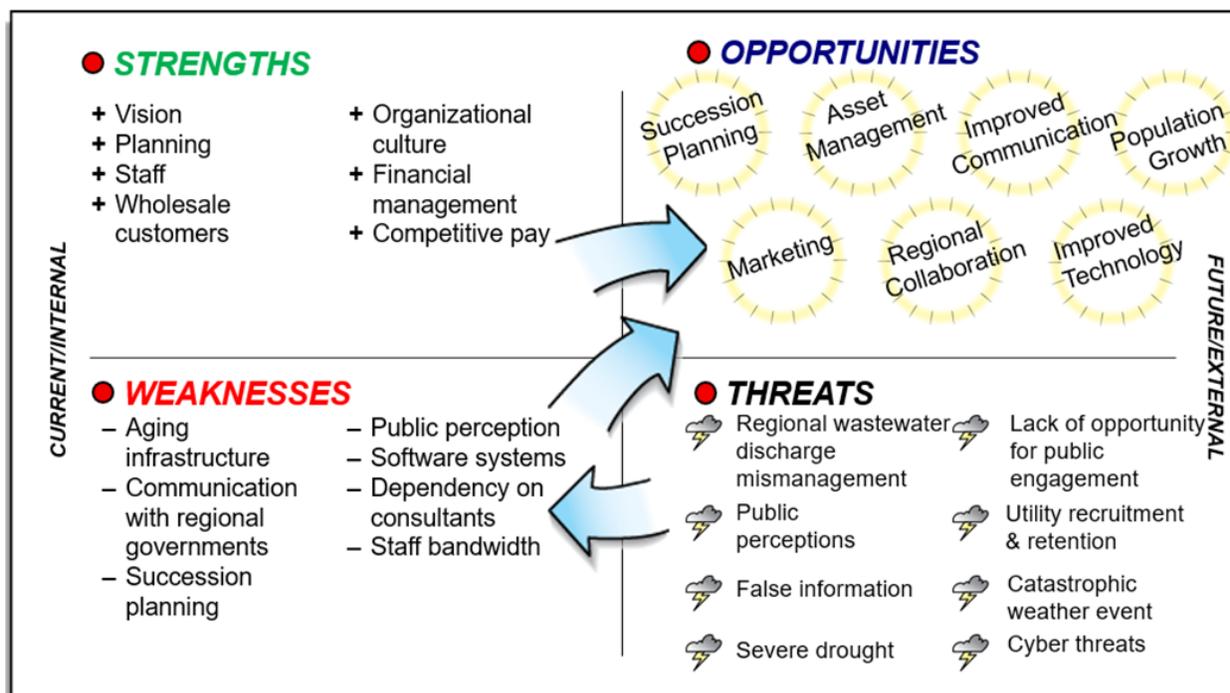
## Context Map



Effective strategic planning does not occur in a vacuum. Instead, it relies on a clear understanding of the environment within which the strategy will be carried out. The Authority’s management team completed a structured exercise to describe the current conditions and future trends impacting the GBRA’s ability to adequately understand, plan, and deliver water, wastewater, and related water resource management services in the best interest of the region.

# SWOT ANALYSIS

## Strengths, Weaknesses, Opportunities, Threats



After evaluating the attributes of the current and future operational environment, senior leadership members critically and constructively considered the current state of the organization itself:

- Strengths are those assets and capabilities presently available within the organization that can be leveraged to achieve desired results.
- Weaknesses are those current aspects of the organization that stand in the way of strategic success and that must be overcome to achieve optimal results.
- Opportunities are in the future and may be either internal or external. These are conditions that can be captured to obtain strategic advantage through capitalizing on strengths, overcoming weaknesses, and mitigating threats.
- Threats are future external events if unmitigated, have the potential to impair the organization’s ability to realize strategic success. These may be political, economic, societal, natural, or man-made in nature.
- Results of the SWOT analysis helped the management team in the identification of important goals, objectives, and initiatives, both short- and long-term.



## **COMMITMENT & PROMISE**

### **Our Commitment**

A commitment statement describes the organization's purpose. It defines the business of the organization and its relationship to its customers. The Guadalupe-Blanco River Authority updated their commitment statement to address the future needs and desires of the organization.

**Our Commitment: Lead cooperative stewardship of the water resources within the Guadalupe River Basin to promote quality of life for all.**

### **Our Promise**

The promise statement details the fundamental values that guide how members of the organization conduct themselves in pursuit of the commitment of the organization. The guiding values provide an ethical framework for decision making and action.

**Passion for Service**

**Customer Driven**

**Ethical Leadership**

**Professional Excellence**



## STRATEGIC GOALS

After systematically scanning the external environment, evaluating the strengths and weaknesses of the organization, identifying opportunities and threats, senior leadership confirmed the organization's commitment and promise. The focus of the strategic planning effort turned to the identification of specific strategic goals likely to have the greatest positive impact on the performance of the organization and the results it delivers.

Using a brainstorming technique known as “future pull,” the GBRA leaders were challenged to imagine a future filled with great success. They visualized an organization that is advancing steadily towards its commitment in accordance with its promised values.

They were then asked to think about this question:

**“Looking back from a position of great success, what, specifically, did the Guadalupe – Blanco River Authority do to achieve this level of success?”**

Members of the senior leadership team listed the action steps that, if taken today, would lead the organization to the future they visualized. They considered how to leverage strengths to overcome weaknesses and how to mitigate threats to create opportunities.

Many ideas were generated and captured with each participant describing their own aspirations and priorities for the organization. Working collaboratively, they grouped these ideas together to reveal common key strategic areas of long-term focus, along with a set of immediate “bold steps” to initiate and propel the implementation of the strategic plan.

These bold steps include: invest in our people; play well with others; implement high impact projects; pursue operational excellence; leverage information technology; and leadership in stewardship.



## **STRATEGIC COMMITMENTS**

The identification of the “bold steps” necessary to initiate the implementation of the strategic plan allowed the GBRA leaders to define a set of five strategic goals, and the accomplishment of these goals will lead to the realization of the Authority’s commitment guided by the promised values. These strategic goals are the “must-dos” that establish a foundation for the development of more detailed operating objectives, initiatives, and departmental work plans.

**Focus on the Future**

**Operational Excellence**

**Cooperative Collaboration**

**Invest in Our People**

**Integrated Communications**

# STRATEGY MAP



The map shown here is a simple graphical depiction of the GBRA's overall strategy in terms of its commitment and promised values. It is a concise reference guide to the strategic plan and a useful tool for organizing and aligning departmental business plans and resources in support of the Authority's strategy.



## STRATEGIC GOALS, OBJECTIVES & INITIATIVES

The GBRA Strategic Plan incorporates five (5) strategic goals and sixteen (16) individual objectives supported by forty-six (46) specific initiatives. Additionally, the plan identifies a management team sponsor for each goal, assigns specific accountabilities for the implementation of each initiative, and sets a target date for their completion.



Focus on the Future				
Objective	Initiatives	Accountability	Target Completion Date	Key Performance Indicators
<b>Serve as the leader in environmental stewardship and resource protection for the river basin</b>	Enhance data collection, improve processes, and grow programs related to water quality sampling and analysis	Water Quality Program Supervisor  Laboratory Administrator	FY2023  FY2023 & FY2025  FY2024  FY2023 FY2027	<ul style="list-style-type: none"> <li>Amend the Clean Rivers Program contract to be revenue/expense neutral</li> <li>Collect data and information for the HCP while maintaining baseline data</li> <li>Work with WPP coordinators to implement BMPs through the Plum Creek WPP and Geronimo Creek WPP</li> <li>Demonstrate state of readiness during critical operation periods (weather events, hurricanes, power outages, etc.) by developing an internal readiness plan</li> <li>Evaluate the lab fees and reset per inflation and market comparison</li> </ul>
	Develop a Habitat Conservation Plan, through a regional collaborative process to allow for sustainable water and wastewater services while protecting and stewarding the resources and endangered species of the Guadalupe River Basin	Executive Manager Environmental Science	FY2023 FY2024  FY2025  FY2027	<ul style="list-style-type: none"> <li>Form and seat a committee structure to allow for collaboration and input</li> <li>Compile data and information relevant to species of concern and related hydrologic elements; supplement as needed, including: mussel sampling, WQ sampling, species research and water quality analysis</li> <li>Establish conservation measures and mitigation strategies that are compatible with operations and benefit endangered species</li> <li>Receive an issued ITP from the USFWS</li> </ul>
	Initiate a standing research program at GBRA that addresses operational and environmental issues facing GBRA	Deputy Manager of Environmental Science	Ongoing  Annually  FY2023	<ul style="list-style-type: none"> <li>Conduct site assessments to inform the locations for future GBRA infrastructure projects</li> <li>Coordinate with other basin stakeholders and regulators to prioritize data and information that needs to be generated in the Guadalupe Basin</li> <li>Participate in the SARA nutrient analysis</li> </ul>

**Strategic Goal - Focus on the Future**



			FY2024 FY2023-2025	<ul style="list-style-type: none"> <li>Establish a routine/annual sampling program for freshwater mussels and other aquatic species of interest</li> <li>Assist in the HCP planning process by providing WQ data and analysis related to requirements of freshwater mussels and salamanders</li> </ul>
	Facilitate a process to establish nutrient criteria for the Guadalupe River in the Texas Hill Country for use in the permitting of effluent discharges from WWTPs	Executive Manager of Environmental Science  Deputy Executive Manager of Environmental Science	FY2023  FY2024 FY2023-2025 FY2025  FY2026	<ul style="list-style-type: none"> <li>Collect baseline data and information related to nutrients in the Hill Country</li> <li>Meet with WQ experts to establish a path forward and timeline to achieve the overall goal</li> <li>Engage and inform stakeholders</li> <li>Conduct annual sampling as needed</li> <li>Build a Hill Country water quality model to be used in assessing different parameter levels and scenarios</li> <li>Present results and recommendations to TCEQ</li> </ul>
<b>Implement solutions for future water/ wastewater needs of a growing population and economy</b>	Construct expansion of the ongoing Carrizo Groundwater Supply Project to bring a new source of supply to customers along the TX-130 corridor in Hays and Caldwell Counties	Executive Manager of Engineering  Deputy Executive Manager of Engineering	FY2023  FY2024 FY2027	<ul style="list-style-type: none"> <li>Secure permits for additional groundwater supply from existing leases</li> <li>Complete design</li> <li>Complete construction</li> </ul>
	Development of a new water supply project source from GBRA's existing mid-basin and lower basin surface water permits	Executive Manager of Engineering  Deputy Executive Manager of Engineering	FY2024 FY2027  FY2029	<ul style="list-style-type: none"> <li>Complete preliminary engineering</li> <li>Complete ASR piloting phase and secure TCEQ permitting</li> <li>Complete design</li> </ul>
	Development of the lower basin regional water supply project	Executive Manager of Engineering  Deputy Executive Manager of Engineering	FY2027	<ul style="list-style-type: none"> <li>Complete preliminary engineering</li> </ul>
	Plan and implement capacity expansions to GBRA's Sunfield WWTP to serve the needs of eastern Hays County	Executive Manager of Engineering  Treatment Design Director	FY2023  FY2025 FY2028	<ul style="list-style-type: none"> <li>Complete construction of the expansion to 1.0 MGD by end of FY23</li> <li>Complete design of 2.0 MGD expansion</li> <li>Complete construction of 2.0 MGD</li> <li>Complete 4.0 MGD expansion</li> </ul>

**Strategic Goal - Focus on the Future**



	Plan and implement capacity expansions to GBRA's Stein Falls and Dietz wastewater systems to serve the growing needs between Seguin and New Braunfels	Executive Manager of Engineering  Treatment Design Director	FY2023  FY2023  FY2025	<ul style="list-style-type: none"> <li>• Develop a master plan for the Dietz north service area</li> <li>• Complete design of the 2.0 MGD expansion of the Stein Falls WRF</li> <li>• Complete construction of the 2.0 MGD expansion of the Stein Falls WRF</li> </ul>
	Minimize the impacts of permitting timelines and impacts on infrastructure projects	Executive Manager of Environmental Science  Executive Manager of Engineering	FY2023  FY2023-FY2027  FY2027	<ul style="list-style-type: none"> <li>• Establish a standing meeting between key staff in engineering and environmental to discuss permitting</li> <li>• Develop a list of priority projects and their associated permitting requirements and related needed data/information</li> <li>• Generate needed information in advance of permitting process</li> <li>• Secure an ITP that includes processes and/or steps to facilitate ESA consultations for categories of and specific projects</li> </ul>
<b>Enhance recreational opportunities</b>	Enhance recreational opportunities	General Management Team	FY 2026	<ul style="list-style-type: none"> <li>• Development of the Recreation Master Plan</li> </ul>



Operational Excellence				
Objective	Initiatives	Accountability	Target Completion Date	Key Performance Indicators
<b>Provide superior water and wastewater service</b>	Operate water and wastewater facilities in a manner that is recognized on national and state levels. Apply for awards annually.	Executive Manager of Operations Division Managers	Annually	<ul style="list-style-type: none"> <li>Applications for operational excellence, reuse or optimization submitted to NACWA, AWWA or other related associations</li> </ul>
	Clean all gravity sewers and video inspect for condition assessment. Video inspection every three years after initial assessment.	Chief Operators Collections Crew	FY2023 / Repeat annually	<ul style="list-style-type: none"> <li>Timely NEXGEN reports</li> </ul>
	Cross-train operators to be available as backup or replacement operators for operational continuity, resilience, and safety	Division Managers	FY2027	<ul style="list-style-type: none"> <li>Four operators minimum annually for Hays/Caldwell and Kendall/Comal divisions</li> </ul>
<b>Advance the use of a centralized asset management program</b>	Work with Division Managers to complete the inventory of current assets and initiate preventative maintenance (PM) work orders	Asset Manager	FY2023	<ul style="list-style-type: none"> <li>Enter new or replaced assets into the system and initiate PM orders within three months of final acceptance for each new asset</li> </ul>
	Complete initiation of NEXGEN and produce reports for contracted operations for clients	Asset Manager	FY 2023 / Annually	<ul style="list-style-type: none"> <li>Timely reports</li> </ul>
	Complete development of various available modules in NEXGEN software and implement usage with operators	Chief Operators Division Managers	FY2023 FY2025 FY2024	<ul style="list-style-type: none"> <li>Develop and complete long range asset replacement functions of NEXGEN</li> <li>Implement advanced use of NEXGEN modules to create checklist for daily operational tasks</li> <li>Transfer existing records and add any new data into the backflow prevention module and utilize for compliance</li> </ul>

**Strategic Goal - Operational Excellence**



<b>Leverage technology to advance organizational growth and efficiency</b>	Enhance and advance GBRA's GIS platform to maximize user experience, increase user engagement and optimize tools and spatial data workflows	IT Director IT Project Manager System Administrator	FY2024  FY2025  FY2026	<ul style="list-style-type: none"> <li>• Migrate field data collection efforts to ArcGIS Field Maps</li> <li>• Redesign GIS Portal and map viewers using ArcGIS Enterprise Sites &amp; ArcGIS Experience Builder</li> <li>• Develop, train and implement agency-wide editing workflows for critical spatial business data</li> <li>• Expand external web mapping applications and spatial data access (open data) for partners and the general public.</li> </ul>
	Enhance/modernize measures to protect and defend data and information from cybersecurity risks	IT Director IT Project Manager System Administrator Network Administrator	FY2024	<ul style="list-style-type: none"> <li>• Develop and execute an end user pre and post training survey</li> <li>• Secure and evaluate proposals from phishing simulation service providers</li> <li>• Perform regular risk assessments of cyber threats and liabilities</li> <li>• Implement a network security monitoring platform to detect cyber threats</li> </ul>
	Develop a SCADA Master Plan to address the challenges introduced by system growth	IT Director IT Project Manager SCADA Administrator	FY2024	<ul style="list-style-type: none"> <li>• Master plan to include:                             <ul style="list-style-type: none"> <li>• Forecast of staffing needs based on growth</li> <li>• Standardization of hardware and software across the agency</li> </ul> </li> </ul>
	Develop or enhance current software to improve departmental workflows and system integration	IT Director IT Project Manager System Administrator Database Administrator	FY2025	<ul style="list-style-type: none"> <li>• Plan and implement the migration of GBRA's network drives to SharePoint and OneDrive</li> <li>• Determine the feasibility of implementing an enterprise (ERP) solution to replace major standalone software</li> <li>• Establish IT governance for cohesive system integration</li> <li>• Plan and implement measures to efficiently share GBRA data with internal and external users</li> </ul>
	Boost the network infrastructure to enhance communications, increase its reliability, strengthen security, and provide redundancy	IT Director IT Project Manager Network Administrator	FY2025	<ul style="list-style-type: none"> <li>• Develop network design standards and implement standards on all existing and new local and wide area networks</li> <li>• Implement layer 3 networking within GBRA's communication backbone</li> </ul>

**Strategic Goal - Operational Excellence**



<b>Prudently manage financial resources to ensure sufficient funding for operations, programs and long-term sustainability</b>	Strategically propose and potentially utilize financial reserves when appropriate to take advantage of economic opportunities, purchase one-time items, implement specific initiatives, or provide funding for new projects prior to the receipt of bond proceeds	Executive Manager of Finance/CFO	Ongoing	<ul style="list-style-type: none"> <li>• Board action items presented for consideration</li> <li>• Periodic updates to the Board</li> </ul>
	Evaluate new initiatives to ensure alignment with the objectives in the Strategic Plan	Executive Manager of Finance/CFO Deputy Executive Manager of Finance	Annually and ongoing	<ul style="list-style-type: none"> <li>• Balanced budget adopted by Board with priority given to items that align with Strategic Plan</li> <li>• Align budget work plan and business plans with organizational strategic plan</li> </ul>
	Develop a risk assessment tool to evaluate and monitor financial operations to ensure the adequacy and effectiveness of internal controls and provide detailed documentation to financial auditors	Executive Manager of Finance/CFO Deputy Executive Manager of Finance	FY2024	<ul style="list-style-type: none"> <li>• Deficiencies identified through risk assessments should be addressed and corrected within 60 days</li> <li>• Reassessments will be performed periodically as existing processes are changed and new processes implemented.</li> </ul>
	Evaluate and implement best practices in debt administration to efficiently manage the increased workload and compliance requirements with higher levels of debt	Executive Manager of Finance/CFO Deputy Executive Manager of Finance	FY 2025	<ul style="list-style-type: none"> <li>• Responsibilities to be shifted to create greater capacity for treasury and debt administration responsibilities, which may require additional staffing</li> <li>• Provide additional training opportunities for team members involved in debt management</li> </ul>
	Explore additional ways to expand financial transparency in providing more information to the public	Executive Manager of Finance/CFO Deputy Executive Manager of Finance Purchasing Manager	FY2026	<ul style="list-style-type: none"> <li>• Expand GBRA's Financial Transparency webpage to meet Texas Comptroller guidelines for additional Transparency Stars (considerations may include debt obligations, public pensions, and contracts &amp; procurement)</li> </ul>



Cooperative Collaboration				
Objective	Initiatives	Accountability	Target Completion Date	Key Performance Indicators
<b>Engage with community, customers and thought leaders</b>	Develop and implement a customer and community interaction plan	Director of Regulatory & Customer Affairs  PR/Communications Director	FY2023 - Develop  FY2024/FY2025 - Implement	<ul style="list-style-type: none"> <li>Define community, customers and thought leaders</li> <li>Identify strategic partnerships and economic development partnerships</li> <li>Standardize reporting from meetings of local governing boards to GBRA leadership</li> <li>Create an events calendar</li> <li>Provide annual opportunities for facility tours for stakeholders</li> <li>Generate engagement through the creation of a GBRA Speakers Bureau</li> </ul>
	Develop procurement guidance document for “How to do business with GBRA)	Purchasing Manager  PR/Communications M Director	FY2024	<ul style="list-style-type: none"> <li>Completion of packet and posting on website</li> </ul>
	Publish a Developer Resources Guide to provide information to the development community on procedures to obtain GBRA utility services	Executive Manager of Engineering  Engineering Director  Construction Director	FY2023  Ongoing  FY2024	<ul style="list-style-type: none"> <li>Integrate a new PMIS with stakeholder dashboards and publish the initial DRG</li> <li>Engage internal and external stakeholders annually to receive feedback on potential revisions</li> <li>Publish annual updates to DRG at start of each calendar year beginning in 2024</li> </ul>
<b>Expand involvement with national, regional and state organizations</b>	Create interaction plan for national, regional, water, wastewater, state and local organizations	Director of Regulatory & Customer Affairs	FY2024	<ul style="list-style-type: none"> <li>Identify organizations for GBRA participation and evaluate membership and sponsorship process</li> <li>Identify contacts with each organization and GBRA departments to lead the relationship</li> <li>Participate on association boards or sub-committees</li> <li>Submit abstracts for presentation opportunities</li> </ul>

**Strategic Goal - Cooperative Collaboration**



				<ul style="list-style-type: none"> <li>Identify areas of expansion (local; establish process for roles/boards/etc.)</li> </ul>
<b>Lead basin-wide water resource planning efforts</b>	Lead a regional water supply planning effort for the Guadalupe River Basin identifying options for sharing capacity in planned projects, new sources of supply, and implementation of the first direct reuse facility in the Guadalupe River Basin	<p>Executive Manager of Engineering</p> <p>Deputy Executive Manager of Engineering</p>	FY2024	<ul style="list-style-type: none"> <li>Develop a more thorough understanding of future demands and key areas for water delivery</li> <li>Identify specific projects that can meet future demands</li> <li>Identify new sources of supply for the region</li> <li>Determine the preferred location for the first direct reuse facility in the basin</li> <li>Participate in the State Regional Water Planning effort (Region L)</li> </ul>
	Coordinate the State Regional Flood Planning effort for the Guadalupe River Basin	<p>Deputy Executive Manager of Engineering</p> <p>Director of Regulatory &amp; Customer Affairs</p>	Ongoing	<ul style="list-style-type: none"> <li>Completion of the first regional flood plan by January 2023</li> </ul>
	Leverage the FEMA Cooperative Technical Partnership Program to secure funding for Guadalupe River Basin communities to update flood hazard data	Deputy Executive Manager of Engineering	Ongoing	<ul style="list-style-type: none"> <li>Develop an annual list of potential projects for interested communities in the basin</li> <li>Host annual meeting</li> </ul>



Invest in Our People				
Objective	Initiatives	Accountability	Target Completion Date	Key Performance Indicators
<b>Recruit and retain high-quality team members</b>	Enhance approach to workforce recruitment, hiring, and retention, resulting in a diverse, effective workforce to meet the present and future needs of GBRA	Director of Human Resources	FY2023 FY2024 FY2025	<ul style="list-style-type: none"> <li>Track the retention rates of new employees and turnover rates</li> <li>Develop and issue onboarding survey</li> <li>Execute a market analysis for salary and benefits</li> <li>Establish core training program</li> <li>Establish formal succession plan</li> </ul>
	<p>Create a positive experience and support employee work-life balance through engagement and wellness</p> <p>Improve initiatives such as enhanced staff communication, wellness, recognition, and diversity, equity &amp; inclusion programs</p>	<p>Director of Human Resources</p> <p>Director of Communication</p>	<p>FY2023</p> <p>FY2024 Develop</p> <p>FY2025 Implement</p>	<ul style="list-style-type: none"> <li>Issue employee survey and continue on a bi-annual basis</li> <li>Measure employee participation</li> <li>Establish an approach and framework for the DEI program</li> </ul>
<b>Develop a safety culture that is consistent with industry best practices</b>	Enhance workplace safety and employee engagement program	<p>Safety Department</p> <p>Facility Managers, Operators and Supervisors</p>	FY2023	<ul style="list-style-type: none"> <li>Employee survey engagement results</li> <li>Measure of days away case</li> <li>Track and trend incidents, near misses, positive observation reports</li> </ul>
	Strengthen employee training - provide access and support to cutting-edge technology, training material and hands-on stewardship training	<p>Safety Department</p> <p>Division Managers</p>	FY2023	<ul style="list-style-type: none"> <li>Develop, issue and act on survey for access and usability ease</li> <li>Survey for applicability and new material in field of training</li> <li>Remeasure near miss/incident metrics</li> <li>SSE Program Audit: Form is used, completed, closed out within six months. Audit frequency every 6 months</li> </ul>

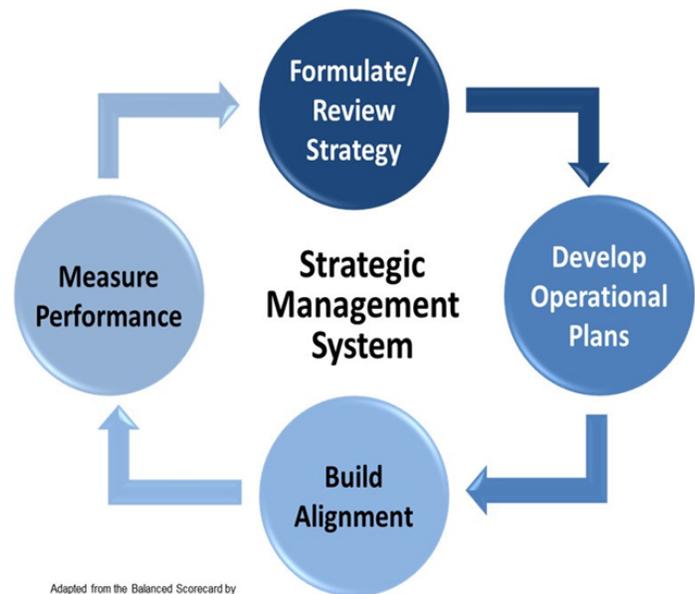


Integrated Communications				
Objective	Initiatives	Accountability	Target Completion Date	Key Performance Indicators
<b>Grow and improve our presence and brand awareness through purpose-driven communications and engaging content</b>	Develop and implement annual communication plan	Director of Communication  Database Administrator  Director of Regulatory & Customer Affairs	FY2023 / annually	<ul style="list-style-type: none"> <li>• Brand refresh/update deliverables</li> <li>• Content engagement - unique visitors, page views, etc.</li> <li>• Website optimization - improved functionality and user experience</li> <li>• Sponsorship strategy</li> </ul>
<b>Expand public outreach through education efforts</b>	Enhance education programming and partnerships to the level of becoming a regional leader in water education	Education Manager	FY2024 / ongoing	<ul style="list-style-type: none"> <li>• Number of engagements with target audiences</li> <li>• Regional partnerships; recognitions</li> </ul>
	Create efficiencies utilizing technology  Promoting awareness of current online education modules; develop strategy to create new modules to boost other initiatives	Education Manager	FY2023	<ul style="list-style-type: none"> <li>• Engagement reports through analytics</li> </ul>
<b>Enhance Board of Director engagement</b>	Create and implement Board of Directors Communication Plan	General Management Team  Director of Regulatory & Customer Affairs  Director of Communications	FY2023  FY2025	<ul style="list-style-type: none"> <li>• Survey Board of Directors and execute on survey results</li> <li>• Annual strategic plan reporting</li> <li>• Performance scorecard</li> </ul>

## IMPLEMENTATION PLAN

Strategy execution is often the most difficult and challenging aspect of strategic management for an organization to tackle. Execution includes translating the strategy into operational plans, building organizational alignment and monitoring performance against plans to ensure an organization stays on course to achieve its strategy. Developing a comprehensive plan that accounts for these execution building blocks and providing the necessary resources to make it happen will enable GBRA to achieve results that are more predictable, in line with its stated direction.

The model at right depicts the four main components of a Strategic Management System. This model is an adaptation of the Balanced Scorecard approach first introduced by Dr. Robert Kaplan and Dr. David Norton in the early '90s and is widely considered a best practice in the strategic management discipline.



Adapted from the Balanced Scorecard by Dr. Robert Kaplan and Dr. Robert Norton

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As shown in the model, strategic management is a cyclical process, including the following major elements.

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- **Formulate/Review Strategy:** Articulate the mission, vision, values, and high-level goals, strategies and measures of success. Review the strategy at least annually and adjust as needed.
- **Develop Operational Plans:** Develop Service Area and Service Unit business plans and budgets that include the specific objectives, initiatives, performance targets, resources and funding required to achieve the strategy.
- **Build Alignment:** Communicate the strategy and plans internally and with key external stakeholders, incorporate strategic goals and objectives into employee performance plans and link compensation and reward to strategic results.
- **Monitor Results:** Regularly measure, analyze and report on performance results against plans/targets, resolve issues, make course corrections as needed, and share knowledge and best practices to improve overall organizational performance.



With the adoption of this plan, the GBRA administrative team has completed the **Formulate Strategy** stage of the strategic management cycle and is now in the initial phase of the **Develop Operational Plans** stage, having defined objectives, initiatives and accountabilities. Going forward, as the Authority's organizational strategic planning and management capability matures, additional effort will be devoted to building Alignment of the budgeting, business planning and performance management processes and the development and application of a comprehensive set of **Key Performance Indicators**.

The implementation plan in this section documents an approach for the GBRA to effectively transition into disciplined strategy execution and a process of ongoing strategic management. It includes an overall **Strategic Management** phase and the remaining activities required to complete the **Develop Operational Plans** phase and the key activities in the **Build Alignment** and **Monitor Performance** phases.

## Strategic Management System Transition Plan

Establish the core implementation team and finalize the plan for the transition from the current management model to one directly aligned to the organizational strategic plan. The transition plan should include all phases, tasks, deliverables, status meetings, and due dates.

**Task 1.1** – Establish a dedicated core team of leaders to work with the Director of Regulatory and Customer Affairs. The Director, in turn, will coordinate with the designated strategy owner for each of the strategic goals and selected representatives from each Service Area.

**Task 1.2** – Define and document team member roles and responsibilities.

**Task 1.3** – Define strategic management administration guidelines (progress reporting, issue tracking, change control, meeting schedule, etc.).

**Task 1.4** – Conduct a project team kick-off – project overview and provide strategic management training for the core team to increase understanding and awareness of the process itself.

**Task 1.5** – Complete an objective assessment to document the current state of GBRA's strategic management capabilities and to create a baseline for future progress monitoring and to identify capability and process gaps that need to be closed in the design of a new strategic management model.

**Task 1.6** – Finalize the detailed strategic management transition plans, including tasks, deliverables, milestones and timeline.



**Task 1.7** – Monitor project progress, issues and risks.

**Task 1.8** – Conduct regular status meetings.

**Task 1.9** – Transition to “steady state” strategic management (when the strategic management discipline is fully embedded into standard management operating processes).

## Develop Operational Plans

Develop and finalize Service Area and Service Unit business plans aligned to the organizational strategic plan, including specific operating objectives and initiatives, performance measures and targets, resources and funding required to execute the organizational strategy and drive results.

**Task 2.1** – Work with service unit leadership to develop relevant key performance indicators (KPI). Define the KPIs and establish targets.

**Task 2.2** – Develop/finalize an enterprise level strategic performance scorecard.

**Task 2.3** – Develop/finalize Service Area and Service Unit level strategic performance scorecards.

**Task 2.4** – Prioritize and finalize strategic initiatives. Establish owners.

**Task 2.5** – Review current operating plans and budgets. Determine what changes may be required to integrate strategic goals, objectives, initiatives and KPIs into plans.

**Task 2.6** – Determine resource requirements (budget and people) and identify any gaps based on current budget and staff allocation.

**Task 2.7** – Finalize unit-level operational plans to execute strategy.

## Build Alignment

Communicate the strategy and unit-level operating plans internally and with key external stakeholders, incorporate strategic goals and objectives into employee performance plans and reward to strategic results and actively manage cultural change.

**Task 3.1** – Develop a change management plan and communications strategy.

- Identify key messages (i.e., overall strategy, plans, key initiatives, progress updates, etc.)

- Determine purpose for each key message (i.e., inform, call to action, decision-making, etc.)
- Identify internal and external audiences
- Determine communication channels
- Identify communication frequency.

**Task 3.2** – Develop / design an aligned performance management process and evaluation tools. Determine what changes to current and/or past practices may be required to integrate strategic goals and objectives into individual performance plans to establish employee connection and contribution to the strategy.

**Task 3.3** – Determine other activities as appropriate to build alignment and support of the GBRA’s strategy.

## Monitor Performance

Measure, analyze and report on performance results against plans/targets, resolve issues, make course corrections as needed, and share knowledge and best practices to improve overall organizational performance.

**Task 4.1** – Develop and implement a strategic reporting process.

- Develop a strategic management reporting template.
- Determine method to collect and analyze data.
- Determine reporting frequency (i.e., monthly, quarterly, etc.).
- Develop a report and conduct periodic reviews with the GBRA’s General Manager/CEO, the Strategic Management Team and appropriate others including the GBRA Board of Directors.
- Publish/communicate strategic performance results to customers, managers, employees and other stakeholders

**Task 4.2** – Work with IT to automate data collection and build robust reporting functionality and executive dashboards.

**Task 4.3** – Establish an annual strategic management planning calendar.

**Task 4.4** – Develop and publish an annual report highlighting strategic accomplishments, misses, and any other insights to improve/enhance overall strategic performance. This information is a key input into the Formulate/Review phase of the Strategic Management system.

