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Meeting Date: March 18, 2026  
Staff Contact: Susan J. Lander, Controller

**TITLE: R-26-10 – Establishing One-Year Objectives for the Albuquerque Bernalillo County Water Utility Authority in Fiscal Year 2027 to Meet Goals**

**ACTION: Introduction March 18, 2026 - Final Action April 22, 2026**

**SUMMARY:**

**Overview of Goal Development**

The Albuquerque Bernalillo County Water Utility Authority (Water Authority) established its business system Goals and One-Year Objectives in 2005 to guide the annual budget process and prioritize key operational needs. The Budget Ordinance requires annual review and adoption of one-year objectives and directs the Executive Director to prepare an operating budget aligned with these goals and objectives. These elements serve as major factors in determining operating and capital funding.

The Water Authority's Goals are based on the American Water Works Association (AWWA) business model, which draws from recognized quality frameworks including the Malcolm Baldrige National Quality Award, the Deming Award, and ISO standards. The model organizes the Water Authority's work into five business systems:

1. Water Supply and Operations
2. Wastewater Collection and Operations
3. Customer Relations
4. Business Planning and Management
5. Organization Development

The Water Authority participates in AWWA-based continuous performance activities—Benchmarking, Self-Assessment, and Peer Review—and has used the EPA's Effective Utility Management (EUM) framework since 2012 to identify performance gaps. Following EPA's 2024 updates to the EUM Primer and Roadmap, the Water Authority is revising its framework in FY26.

The Technical Customer Advisory Committee reviewed and supports the proposed objectives, which focus on ongoing operational improvement and efficiency.

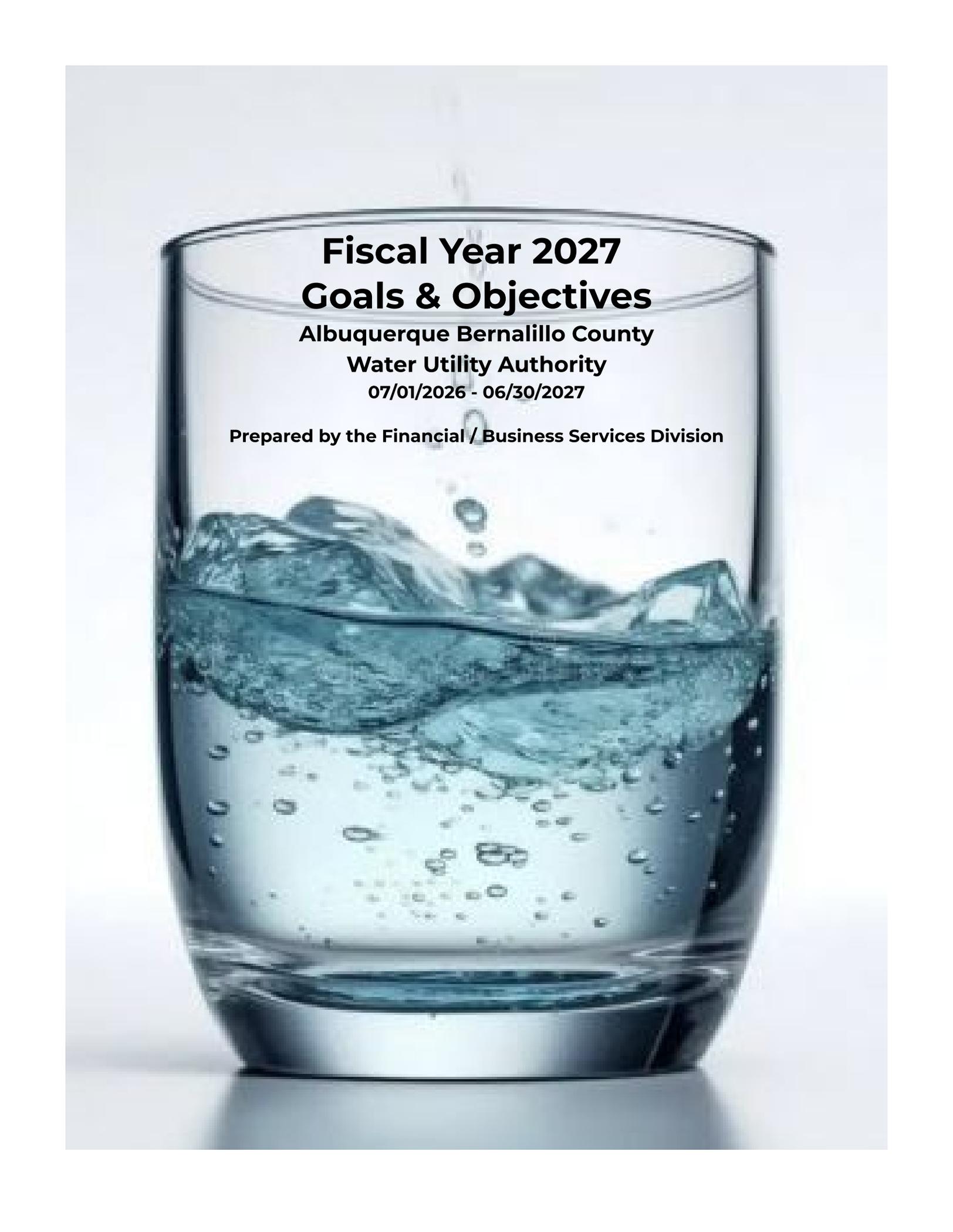
## **Overview of One-Year Objectives**

The One-Year Objectives are organized by business system Goal and reflect long-term desired outcomes in each area. Performance measures are used to monitor results, identify service or performance gaps, and set targets. Objectives are developed to address those gaps, complete priority projects, or improve programs. Some objectives continue from FY26 because they require additional time or represent ongoing work.

### **FISCAL IMPACT:**

Objectives are directly related to the development of the annual budget.



A high-speed photograph of a glass of water with a splash. The water is clear and blue-tinted. The splash is in the middle of the glass, with water droplets flying upwards and outwards. The glass is a simple, cylindrical shape with a thick base. The background is a plain, light color.

# **Fiscal Year 2027 Goals & Objectives**

**Albuquerque Bernalillo County  
Water Utility Authority  
07/01/2026 - 06/30/2027**

**Prepared by the Financial / Business Services Division**



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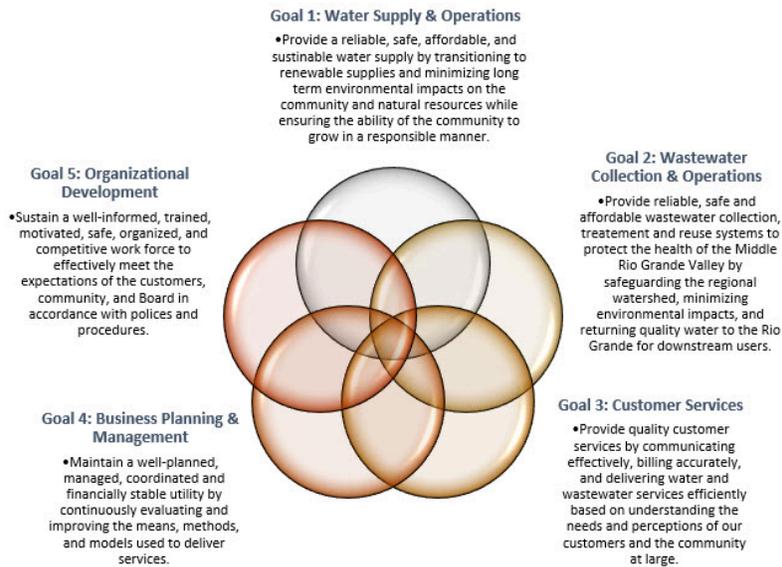
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# Summary

## Business System Goals

The Water Authority’s Business System goals are modeled after the American Water Works Association (AWWA) business framework. This framework draws upon fifteen proven quality achievement programs, including the Malcolm Baldrige National Quality Award, the Deming Prize, and the International Organization for Standardization (ISO) series of quality standards. It defines the work of a typical water and wastewater utility across five core business systems.

The figure below illustrates the business system goals, which align closely with the AWWA model. In addition, the Water Authority has established guiding goal statements for each area, articulating the long-term outcomes it seeks to achieve.



## One-Year Objectives

The Water Authority’s One-Year Objectives are organized around its core business system goal areas. Continuous performance programs play a key role in identifying gaps in service delivery and overall performance.

When gaps are identified, the One-Year Objectives—policy directives set by the Water Authority Board—serve as the mechanism to close those gaps and elevate service and performance levels.

These objectives vary in scope:

- Some focus on completing specific projects or enhancing existing programs.
- Several FY2027 objectives are directly linked to resources allocated in the FY2027 Approved Budget.
- A number of objectives are carried over from FY2026, either because they require additional time to complete or address ongoing issues.
- Others are tied to the Performance Plan, with the aim of strengthening operations and improving customer service.

**The purpose of establishing goals and objectives for the Albuquerque Bernalillo County Water Utility Authority (Water Authority) is to ensure strategic alignment, operational efficiency, and accountability in delivering reliable water and wastewater services to the community.**

## Goal 1: Water Supply and Operations

*Provide a reliable, safe, affordable, and sustainable water supply by transitioning to renewable supplies and minimizing long term environmental impacts on the community and natural resources while ensuring the ability of the community to grow in a responsible manner.*

### 1-1 Objective

Develop a long-term strategy for utilizing existing wells that are currently out of service within the water system and identify/update priority Arsenic Treatment plant projects for design and construction by the end of the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Laughlin/J. Berman/Andrade/Kelly**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-2 Objective

To quantify reservoir leakage and prepare for system-wide reservoir rehabilitation projects for 65 reservoirs (approximately 10-to-15-year rehabilitation program):

- Utilize the hydraulic model to identify system constraints by isolating up to 5 reservoirs per year and presenting results to Plant and Field Operations for field investigations by Q2 of each fiscal year starting in FY27.
- Perform field investigations, exercise valves and trial reservoir isolations for up to 5 reservoirs during Q2 and Q3 of each fiscal year starting in FY27.
- During the trial reservoir isolations, isolate the reservoirs for multiple consecutive days to identify potential leakage rates and other constraints for taking reservoirs out of service for future rehabilitation work (up to 6-month outage per reservoir).

**Staff Assignment: Shuryn/K. Berman/J. Berman/Andrade/ Warren/Malouff**

Results:

| Tasks                | Status | Description |
|----------------------|--------|-------------|
| Hydraulic Modeling   |        |             |
| Field Investigations |        |             |
| Trial Isolations     |        |             |

### 1-3 Objective

Provide quarterly updates on status and progress regarding active rehabilitation of potable reservoirs (concrete and steel) via the active CMAR Reservoir Rehab Program contractor through FY27.

**Staff Assignment: Laughlin/Richardson**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-4 Objective

Work with City and other project stakeholders to design and construct the Tijeras Reuse Reservoir and Pump Station (RRPS) facilities at Mesa Del Sol in multiple phases, to support future reuse irrigation and special industrial activities in the Mesa Del Sol community, through the end of FY27.

**Staff Assignment: Laughlin/Richardson**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-5 Objective

Deliver reliable and compliant water to To'Hajiilee through the new transmission line throughout FY27. Prioritize the use of groundwater in the College Trunk to maintain disinfection byproducts (DBP) below 60 ug/L (ppb) at the To-Hajiilee Terminal Facility without the need to flush the distribution system at or prior to the terminal facility.

**Staff Assignment: J. Berman/Andrade**

Results:

| To'Hajiilee Water Deliveries          |    |    |    |    |
|---------------------------------------|----|----|----|----|
| Parameter                             | Q1 | Q2 | Q3 | Q4 |
| Gallons Delivered                     |    |    |    |    |
| Average Chlorine Residuals (mg/L)     |    |    |    |    |
| Average Disinfection Byproducts (ppb) |    |    |    |    |

### 1-6 Objective

Utilize the hydraulic model to quantify the water system impacts resulting from pumping strategy modifications which align with PNM Time of Day (TOD) rate structure by the end of the 1<sup>st</sup> Quarter of FY27. If the hydraulic modeling results are favorable, implement modified pumping strategy to balance cost efficiency with water quality and quantity starting in the 2<sup>nd</sup> Quarter of FY27.

**Staff Assignment: Shurn/K. Berman/J. Berman/Andrade**

Results:

| Tasks                       | Status | Description |
|-----------------------------|--------|-------------|
| Hydraulic Modeling          |        |             |
| Modified Pumping Strategies |        |             |

### 1-7 Objective

Improve monitoring and trending of the Total Organic Carbon (TOC) concentration and removal across the Water Treatment Plant to better predict potential Disinfection By-Product (DBP) formation in the distribution system. Continue to optimize TOC removal through enhanced coagulation and biologically active filtration by reporting quarterly data to assess seasonal TOC trends and removal metrics through the 4th Quarter of FY27.

**Staff Assignment: J. Berman/Sanchez**

Results:

| Average Total Organic Carbon (TOC) in mg/L |         |         |         |         |
|--|---------|---------|---------|---------|
| Sample Point                               | Q1 Avg. | Q2 Avg. | Q3 Avg. | Q4 Avg. |
| Gallons Delivered                          |         |         |         |         |
| Average Chlorine Residuals (mg/L)          |         |         |         |         |
| Average Disinfection Byproducts (ppb)      |         |         |         |         |

### 1-8 Objective

Submit annual treatment data to the Partnership for Safe Water—Treatment program for inclusion in the program's annual report of aggregated system water quality data by the end of the 4th Quarter of FY27.

- Maintain turbidities for each individual filter cell and for combined filter effluent at less than 0.1 nephelometric turbidity unit (NTU) more than 95% of time in operation.
- Continue work on items identified from the Phase 3 Self-Assessment that are not yet considered optimized and submit a progress report to AWWA.
- Continue working towards the application for the Phase IV Excellence in Water Treatment Award in the Partnership for Safe Water—Treatment.

**Staff Assignment: J. Berman/Sanchez**

Results:

| Tasks                    | Status | Description |
|--------------------------|--------|-------------|
| Percent of Time <0.1 NTU |        |             |

### 1-9 Objective

Operate the newly constructed Volcano Cliffs Arsenic Treatment Facility immediately after commissioning to demonstrate functionality and reliability throughout the 12-month warranty period during FY27.

**Staff Assignment: J. Berman/Andrade**

Results:

| <b>Volcano Cliffs Arsenic Treatment Facility Performance</b>  |         |         |         |         |
|---|---------|---------|---------|---------|
| Parameter   | Q1 Avg. | Q2 Avg. | Q3 Avg. | Q4 Avg. |
| <b>Avg. Arsenic Concentration—Influent from Wells (ppb)</b>   |         |         |         |         |
| <b>Avg. Arsenic Concentration—Effluent to Customers (ppb)</b> |         |         |         |         |
| <b>Treated Wellfield Volume to Customers (MG)</b>             |         |         |         |         |

### 1-10 Objective

Submit annual distribution data to the Partnership for Safe Water—Distribution program for inclusion in the program’s annual report of aggregated system water quality data by the end of the 4th Quarter of FY27.

Continue to work on items identified from the Phase 3 Self-Assessment that are not yet considered optimized and submit a progress report to AWWA.

**Staff Assignment: Warren/Malouff**

Results:

| Tasks  | Status |
|--|--------|
| Submittal of annual distribution data to the Partnership for Safe Water for FY27 |        |
|  |        |

### 1-11 Objective

Complete an emergency vulnerability assessment including hydraulic modeling based on available demands for a consecutive water system that utilizes the Water Authority system as a backup source to ensure no operational impacts are anticipated. Develop a report of the results of the assessment to include any operational changes or capital improvements required by the end of FY27.

**Staff Assignment: Warren/Malouff/Shuryn/K. Berman**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-12 Objective

Evaluate the use of ultrasonic meters for low flow measurement at various large meter vaults during FY27. Prepare a cost-benefit analysis of transitioning to ultrasonic meters considering the meter accuracy, lifespan, and the required maintenance of the existing mechanical meter.

**Staff Assignment: Warren/Malouff**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-13 Objective

Update the Water Resources Management Strategy: Water 2130 by the end of the 2<sup>nd</sup> Quarter of FY27.

**Staff Assignment: Kelly/Agnew/Arber**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-14 Objective

Begin implementation of the Colorado River Water Users Memorandum of Understanding (MOU), which promotes municipal water conservation through conversions to drought-and climate-resilient landscaping, while maintaining vital urban landscapes and tree canopies that benefit our communities, wildlife, and the environment. Implement the MOU by developing three (3) non-functional turf pilot projects by the end of the 4th Quarter of FY27.

**Staff Assignment: Kelly/Arber**

Results:

| Tasks                             | Status | Goal |
|-----------------------------------|--------|------|
| <b>Reduce Non-functional Turf</b> |        | 30%  |
|                                   |        |      |

### 1-15 Objective

Support and advocate for the Water Authority's interests on the Colorado River through the end of the 4th Quarter of FY27.

- Promote collaboration and advocacy among San Juan-Chama contractors and the San Juan River Basin for sustainable water resources through continued leadership and support for the San Juan Chama Contractor's Association.
- Attend Upper Colorado River Commission (UCRC) meetings as well as regular monthly updates from the New Mexico Interstate Stream Commission (NMISC).

**Staff Assignment: Kelly/Agnew**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-16 Objective

Work with the New Mexico Environment Department (NMED) and Office of the State Engineer to begin aquifer storage and recovery (ASR) permitting by the end of the 4th Quarter of FY27.

**Staff Assignment: Kelly/Agnew**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-17 Objective

Implement the Rivers and Aquifers Protection Plan (RAPP), the Water Authority's source water protection plan, through the following actions:

- i. Identify and develop outreach and education of source water protection actions for customers and agencies in support of implementation of the RAPP;
- ii. Track and review site data and documents for priority groundwater contamination sites through the end of the 4th Quarter of FY27;
- iii. Collaborate and coordinate with other agencies, including support of the Water Protection Advisory Board (WPAB) through the end of the 4th Quarter of FY27; and
- iv. Collaborate and coordinate with Water Authority divisions on responses and actions for released to source waters.

**Staff Assignment: Kelly/Agnew**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 1-18 Objective

Take steps towards permitting of native Rio Grande system water by the Water Authority within Abiquiu Reservoir. Coordinate with NMISC and NMOSE on the permit application and draft permit through the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Kelly/Agnew**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

**The Water Authority's primary mission is to provide reliable, high-quality, affordable, and sustainable water supply and wastewater services to the Albuquerque and Bernalillo County region. Goals and objectives help operationalize this mission by setting measurable targets for service delivery, infrastructure maintenance, and system upgrades.**

## Goal 2: Wastewater Collection and Operations

*Provide reliable, safe and affordable wastewater collection, treatment and reuse systems to protect the health of the Middle Rio Grande Valley by safeguarding the regional watershed, minimizing environmental impacts, and returning quality water to the Rio Grande for downstream users.*

### 2-1 Objective

Continue work on the Partnership for Clean Water program for the Southside Water Reclamation Plant (SWRP) to optimize system operations and performance by the end of the 4th Quarter of FY27.

Continue work on outstanding items identified from the Phase 3 Self-Assessment that are not yet considered optimized and submit a progress report to AWWA.

**Staff Assignment: J. Berman/Larson**

Results:

| Tasks  | Status | Description |
|--|--------|-------------|
| Partnership for Safe Water - Phase III Self-Assessment |        |             |
| Staff work on items not yet optimized                  |        |             |
| Self-Assessment update                                 |        |             |

### 2-2 Objective

Manage chemical usage and residual iron sludge from the Water Treatment Plant to manage collection system corrosion and odor control, with a goal of zero odors, while considering impacts on wastewater treatment operations and effluent quality and considering cost-effective ventilation control solutions. Monitor and report metrics through the end of the 4th Quarter of FY27.

**Staff Assignment: Warren/Holstad/J. Berman/Larson**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 2-3 Objective

As part of the CMOM Program, continue to evaluate pilot modifications to the Sub-Basin cleaning program. Look at possible changes such as sub-basin cleaning frequency to optimize effectiveness of preventative maintenance cleaning to the lines most likely to spill. Engage with national efforts to evaluate effectiveness of industry guidelines for collection system cleaning. Provide final recommendations for modifications to the cleaning program by the end of the 4th Quarter of FY27.

**Staff Assignment: Warren/Holstad**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 2-4 Objective

With FY25 completion of AMI device installation in all ten vacuum station service areas, obtain and utilize data to gather system performance data by the end of the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Warren/Holstad**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

## 2-5 Objective

Collection section – Field Division will evaluate additional linear asset rehabilitation that can and should be performed in-house by the end of the 4<sup>th</sup> Quarter of FY27. The goal will be to increase level of service to the customers through cost effective extension of asset life. Consideration will be needed for specific types of rehab, equipment needed and staffing, including skills. Evaluation will be through internal studies and networking.

**Staff Assignment: Warren/Holstad**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

## 2-6 Objective

Develop a template contract for new satellite communities which discharge wastewater to the Water Authority Collection System for conveyance to and treatment by the SWRP by the end of the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Warren/Holstad/Shuryn/Cadena/Melendrez**

Results:

| Tasks   | Status | Description |
|---|--------|-------------|
| Breakout sessions as needed to review initial topic list and draft more specific language for Wastewater Ops, UTD, CE, and Water Resources. |        |             |
| Identify whether consecutive water systems should be included.  |        |             |
| Legal review of initial draft and list of satellite communities of concern.   |        |             |

## 2-7 Objective

In support of the Bosque Water Reclamation Plant, work collaboratively to develop actions, workflow, and an updated timeline for completion of the required planning/design documents, permits, and environmental documents through FY27.

**Staff Assignment: Kelly/Agnew/Shuryn/Laughlin**

Results:

| Tasks              | Status | Description |
|--------------------|--------|-------------|
| Funding Plan       |        |             |
| Outfall            |        |             |
| Plan & Design      |        |             |
| CMAR Solicitation  |        |             |
| Public Meetings    |        |             |
| Public Impact Plan |        |             |

## 2-8 Objective

Review the Waste Hauling Oversight & Pretreatment processes with SWRP plant staff to identify improvements in the ability to limit and enforce against prohibited waste that is dumped at septage receiving by the end of the 4<sup>th</sup> Quarter of FY27. This review will include administrative and technical process reviews as well as any necessary changes to the Sewer Use and Wastewater Control Ordinance that may be necessary to implement changes.

**Staff Assignment: Shuryn/Zarrei/J. Berman/Larson**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

## 2-9 Objective

Initiate the local limits review and calculations for the new NPDES permit, propose changes to the Sewer Use and Wastewater Control Ordinance for review. Meet EPA timeline requirements for TDS-related deadlines, identify any additional data collection requirements and assist with hiring outside assistance for review, as needed by the end of the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Shuryn/Zarrei/Peacock**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

## 2-10 Objective

Integrate the sewer model into the centralized modeling program with the following priority projects by the end of the 4<sup>th</sup> Quarter of FY27:

- Build a reference map and procedure for Collections to easily and quickly calculate sewage interceptor flow amounts in an overflow emergency.
- Work with Utility Development to establish an updated Availability Statement process for sewer use.
- Establish a strategic plan and priorities for using the sewer model into the future with feedback from all divisions.

**Staff Assignment: Shuryn/K Berman/Warren**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

**The Water Authority’s objectives include responsive customer service, transparent communication, and public education about water conservation and infrastructure projects. These efforts build trust and encourage community participation in water stewardship.**

## Goal 3: Customer Services

*Provide quality customer services by communicating effectively, billing accurately, and delivering water and wastewater services efficiently based on understanding the needs and perceptions of our customers and the community at large.*

### 3-1 Objective

Improve customer satisfaction and operational efficiency in achieving the call center targets through the 4th Quarter of FY27.

**Staff Assignment: Ortiz/Mendez**

Results:

| Tasks                  | Q1 | Q2 | Q3 | Q4 | Target    |
|------------------------|----|----|----|----|-----------|
| Wait Time (minutes)    |    |    |    |    | <1:00 min |
| Contact Time (minutes) |    |    |    |    | <4:00 min |
| Abandoned Call Ratio   |    |    |    |    | <3%       |
| First Call Resolution  |    |    |    |    | >95%      |
| Average Call Quality   |    |    |    |    | >90%      |

### 3-2 Objective

Reduce the percentage of delinquent water and wastewater accounts to below 10% over the next 2 years by the end of the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Ortiz/Mendez**

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 3-3 Objective

Increase "HomeConnect" enrollment and enhance the digital customer experience by the end of the 4th Quarter of FY27, using the platform to strengthen customer awareness of water-conservation practices.

**Staff Assignment: Kelly/Ortiz/Mendez**

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 3-4 Objective

Continue implementation of the AMI project by replacing 8,000 aging water meters with smart meters to increase revenue, support conservation efforts, and provide better customer service by the end of the 4th Quarter of FY27.

**Staff Assignment: Warren/Malouff**

| Quarter | Meters Replaced | Goal           |
|---------|-----------------|----------------|
| Q1      |                 | 8,000 Annually |
| Q2      |                 |                |
| Q3      |                 |                |
| Q4      |                 |                |
| Total   |                 |                |

### 3-5 Objective

Conduct Customer Conversation meetings to engage customers and obtain input from customers on the Water Authority's activities through the end of the 4th Quarter of FY27.

**Staff Assignment: Morris**

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 3-6 Objective

Develop data-based conservation efforts to utilize customer and Water Authority data to target users for conservation efforts by the 4th Quarter of FY27.

**Staff Assignment: Kelly/Arber**

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 3-7 Objective

Incorporate components of the Guide to Development on the public website to create a better experience for customers by the end of the 4<sup>th</sup> Quarter of FY27. This includes creation of a Utility Development landing page that houses flow charts, common forms and other helpful resources.

**Staff Assignment: Cadena**

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

**The Water Authority uses its goals to guide budgeting and rate-setting processes. For example, performance objectives are tied to cost-of-service studies, debt management plans, and equitable rate structures to ensure financial sustainability while maintaining affordability.**

## Goal 4: Business Planning and Management

*Maintain a well-planned, managed, coordinated, and financially stable utility by continuously evaluating and improving the means, methods, and models used to deliver services.*

### 4-1 Objective

Implement at least one planned Interceptor Rehabilitation project in FY27, and complete at least one interceptor design package by the 4th Quarter of FY27; Implement at least one planned Small Diameter Sanitary Sewer Rehabilitation project in FY27.

**Staff Assignment: Laughlin/Holstad**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 4-2 Objective

Complete design and start construction on the new SWRP O&M/Trades and a new SWRP Warehouse buildings throughout FY27 and FY28, to provide much needed facility upgrades at SWRP.

**Staff Assignment: Laughlin**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 4-3 Objective

Seek to increase renewable/green energy generation at Water Authority facilities. Provide updates on plan and project progress and report power generation over time by the end of the 4th Quarter of FY27. Generate at least 35% of total SWRP power needs from the on-site solar array and from digester gas-fueled cogeneration by the end of the 4th Quarter of FY27 and report progress quarterly.

**Staff Assignment: J. Berman/Larson**

Results:

| Maintenance  | Q1 | Q2 | Q3 | Q4 | Goal |
|--|----|----|----|----|------|
| Percentage Total SWRP power needs met using renewable sources. * |    |    |    |    | 35%  |

\*Sum of power produced by an on-site solar array or digester gas-fueled cogeneration.

### 4-4 Objective

Complete Pro Rata Cleanup Phase 2, which consists of vetting assessments with missing documentation throughout FY27 and FY28.

**Staff Assignment: Cadena**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 4-5 Objective

Update of Effective Utility Management (EUM) and Operations dashboards via Microsoft Power BI and continue key performance indicators (KPIs) dashboards with remaining workgroups to be completed by the end of the 4<sup>th</sup> Quarter of FY27.

**Staff Assignment: Ortiz/Daniels/Lander**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 4-6 Objective

Complete the update of the Comprehensive Asset Management Plan (CAMP) by the end of the 4<sup>th</sup> Quarter of FY27 to include the following tasks:

- Update asset condition scoring and monitoring framework
- Develop integration with existing asset registry data – Maximo
- Explore feasibility of energy and chemical usage cost analysis
- Update Fleet Maintenance and Compliance Equipment CAMPs

**Staff Assignment: Ortiz/Daniels/Lander/Arellano/Laughlin/J. Berman/Shuryn**

Results:

| Tasks                                    | Status | Description |
|--|--------|-------------|
| Coordination Stakeholder                 |        |             |
| Engage Consultant                        |        |             |
| Begin Data Collection                    |        |             |
| Update Asset Condition Scoring Framework |        |             |
| Develop Integration with Asset Registry  |        |             |
| Update Fleet Maintenance CAMP            |        |             |

### 4-7 Objective

Complete the update of the Asset Management Onboarding and Decommissioning Procedures by the end of the 4<sup>th</sup> Quarter of FY27 to include the following tasks:

- Update asset onboarding process for Centralized Engineering/Utility Development projects
- Clearly define asset hierarchy and structure of asset records–cost and condition data requirements
- Lifecycle maintenance rollup requirements
- Clarify onboarding of specific assets and decommissioning/disposal procedures
- Define year-end asset onboarding financial requirements
- Complete final draft of document for publication
- Train staff on final update.

**Staff Assignment: Ortiz/Daniels**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 4-8 Objective

Continue promoting a Culture of Security in accordance with the AWWA G430 standard within the Water Authority, by developing policies and procedures that include strategies for internal communication and training on security-related topics. Track and measure metrics quarterly throughout FY27 that are directly related to National Infrastructure Protection Plan Water Sector-Specific Plan and America’s Infrastructure Act.

**Staff Assignment: Santiago/Stinson/J. Berman**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 4-9 Objective

Complete the annual update and review of the Comprehensive Information Technology Security Plan and related policies that are aligned with the standards, guidelines, and best practices of the National Institute of Standards and Technology (NIST) Cybersecurity Framework by the end of the 4th Quarter of FY27. Track and measure metrics that are directly related to NIST standards. Incorporate specific standards and policies that directly relate to the Water Authority’s Supervisory Control and Data Acquisition (SCADA) systems. Complete the Annual Penetration (PEN) test and remediate any critical items that pose an imminent threat. Automate and implement a secure zero-trust model to proactively detect and remediate indicators of compromise to minimize the impact on the Water Authority.

**Staff Assignment: Stinson/Sample**

Results:

| Tasks                         | Status | Description       |
|-------------------------------|--------|-------------------|
| External Penetration Testing  |        | Scheduled Q3 FY27 |
| Security Plan & Policy Review |        | Scheduled Q4 FY27 |
| Incident Response Plan Review |        | Scheduled Q4 FY27 |

### 4-10 Objective

Upgrade and patch all enterprise applications to perform required upgrades and enhancements, mitigate potential cybersecurity vulnerabilities, leverage functionality enhancements, and capture and use data intelligently to create efficiencies through the end of the 4th Quarter of FY27. Major Projects include:

- Utility Network upgrade – began in FY26 with completion targeted for FY27.
- SCADA Master Program related projects.
- Begin upgrade to the Asset Management System (Maximo). Expected completion during the 4<sup>th</sup> Quarter of FY27.
- Migration of Infrastructure to SJTP Datacenter.

**Staff Assignment: Stinson/Lind/Walz-Burkett/Chavez/Ebia**

Results:

| Tasks | Health | Timeline Health | Financial Health | Scope Health |
|-------|--------|-----------------|------------------|--------------|
| #1    |        |                 |                  |              |
| #2    |        |                 |                  |              |
| #3    |        |                 |                  |              |

### 4-11 Objective

Develop, implement, and monitor a Maximo conditions assessment for Compliance Division’s inventoried assets by the end of the 4th Quarter of FY27.

**Staff Assignment: Shuryn/Hardeman/Pompeo**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |
| #3    |        |             |

### 4-12 Objective

Implement and begin monitoring a Fleet condition assessment program in the Maximo asset management system by the end of the 4th Quarter of FY27.

**Staff Assignment: Arellano/Stinson/Rocha**

Results:

| Tasks   | Status | Description |
|---|--------|-------------|
| <b>Implement Fleet Condition Assessment Program</b> |        |             |
| <b>Begin monitoring condition assessments</b>       |        |             |

**With the Southwest U.S. facing historic droughts and declining river flows, the Water Authority’s goals emphasize water conservation, reuse, and long-term resource planning. Objectives often include reducing per capita water use, increasing reclaimed water usage, and protecting aquifer levels.**

## Goal 5: Organizational Development

*Sustain a well-informed, trained, motivated, safe, organized, and competitive workforce to effectively meet the expectations of the customers, community, and Board in accordance with adopted policies and mandates.*

### 5-1 Objective

Complete two employee wellness challenges per fiscal quarter focusing on nutrition, physical activity and weight loss, and disease and injury prevention to employees with a 70% or greater overall completion rate by the end of the 4th Quarter of FY27. In collaboration with the Safety program, attend 30% of all in-person safety trainings to lead a stretching/warmup session and promote wellness. Incorporate more remote wellness options for employees to participate in, including video classes and instructional videos by the end of the 4th Quarter of FY27.

**Staff Assignment: Jaramillo/Gonzales**

Results:

| Quarter | Challenge | Completion Rate | Goal |
|---------|-----------|-----------------|------|
| Q1      |           |                 |      |
|         |           |                 |      |
| Q2      |           |                 |      |
|         |           |                 |      |
| Q3      |           |                 |      |
|         |           |                 |      |
| Q4      |           |                 |      |
|         |           |                 |      |

### 5-2 Objective

Develop an awareness program to increase employee participation in annual physicals by 25% by the end of the 4th Quarter of FY27.

**Staff Assignment: Jaramillo/Gonzales**

Results:

| Quarter | FY26 | FY27 | % | Goal |
|---------|------|------|---|------|
| Q1      |      |      |   |      |
| Q2      |      |      |   |      |
| Q3      |      |      |   |      |
| Q4      |      |      |   |      |

### 5-3 Objective

Maintain an average utility-wide vacancy rate of no greater than 7% through the 4th Quarter of FY27. Maintain an average number of days to fill positions of 40 days or less through the end of the 4th Quarter of FY27.

**Staff Assignment: Jaramillo**

Results:

| Tasks        | Q1 | Q2 | Q3 | Q4 | Goal |
|--------------|----|----|----|----|------|
| Vacancy Rate |    |    |    |    | 7%   |
| Days to Fill |    |    |    |    | 40   |

### 5-4 Objective

Consistent with the Water Research Foundation Utility Innovation Project, report the Water Authority's Innovation Program success stories through the end of the 4th Quarter of FY27 with a goal of at least 1 innovation story each quarter.

**Staff Assignment: Jaramillo/Lucas**

Results:

| Quarter | Success Stories |
|---------|-----------------|
| Q1      |                 |
| Q2      |                 |
| Q3      |                 |
| Q4      |                 |

### 5-5 Objective

Explore a partnership with Central New Mexico College to develop an intern program designed to increase recruitment and develop future utility employees by the end of the 4th Quarter of FY27.

**Staff Assignment: Jaramillo/Lucas**

Results:

| Tasks | Status | Description |
|-------|--------|-------------|
| #1    |        |             |
| #2    |        |             |

### 5-6 Objective

Develop a program to enable Water Authority employees to volunteer at community events and represent the Water Authority throughout FY27. Ensure that events are approved through a transparent process, and that normal work is completed.

**Staff Assignment: Kelly/Tuttle/Jaramillo**

Results:

| Tasks      | Q1 | Q2 | Q3 | Q4 | Goal |
|------------|----|----|----|----|------|
| Volunteers |    |    |    |    |      |

### 5-7 Objective

Consistent with the EUM self-assessment, track and measure the effectiveness of an onsite injury prevention program by utilizing a local ergonomic/physical therapy contractor to conduct field ergonomic assessments. The goal of these assessments is to mitigate workplace injuries and to reinforce correct body mechanics. Maintain the yearly injury hours goal of 2,500 hours or less to improve productivity and reliability of services provided by employees by the end of the 4th Quarter of FY27.

**Staff Assignment: Santiago/Jaramillo**

Results:

| Tasks                           | Q1 | Q2 | Q3 | Q4 | Total |
|---------------------------------|----|----|----|----|-------|
| Onsite Ergo Assessments         |    |    |    |    |       |
| Ergonomic Training Presentation |    |    |    |    |       |
| Onsite Job Coaching             |    |    |    |    |       |
| Total Injury Hours Reports      |    |    |    |    |       |

### 5-8 Objective

Deliver a tailored program of monthly safety trainings that addresses the unique operational risks, hazards, and OSHA regulatory requirements specific to each division by the end of the 4th Quarter of FY27. This approach represents a refinement of the existing training program, shifting from general safety topics to a more focused strategy. Topics include, but are not limited to, excavation safety, electrical safety, fall protection, chemical hazard awareness, confined space entry, and Commercial Driver License (CDL) training certifications. Attendance will continue to be tracked through the Learning Management System (LMS) to ensure compliance and engagement.

**Staff Assignment: Santiago/Riggins/Gonzalez**

Results:

| Tasks                             | Q1 | Q2 | Q3 | Q4 | Goal |
|-----------------------------------|----|----|----|----|------|
| Average LMS & FF Class attendance |    |    |    |    |      |
| Quarterly percentage              |    |    |    |    |      |

Continued emphasis will be placed on staff management to improve participation by employees to meet the year-end target.

### 5-9 Objective

Conduct monthly safety inspections to identify hazards and ensure compliance with OSHA standards, with a renewed focus on documenting, tracking, and resolving corrective actions in the Maximo system by the end of the 4th Quarter of FY27. This enhanced approach emphasizes accountability and timely resolution of high hazard inspection findings to improve workplace safety.

**Staff Assignment: Santiago/Jaramillo**

Results:

| Tasks                           | Q1 | Q2 | Q3 | Q4 | Goal |
|---------------------------------|----|----|----|----|------|
| Number of Inspections Completed |    |    |    |    |      |
| Number of Hazards Identified    |    |    |    |    |      |
| Number of Hazards Resolved      |    |    |    |    |      |
| Percentage Resolved             |    |    |    |    |      |

Continued emphasis will be placed on staff management to improve participation by employees to meet the year-end target.

### 5-10 Objective

Conduct a thorough cost-benefit assessment of the Water Authority's benefit plans and establish a review team to analyze results and provide actionable insights.

**Staff Assignment: Jaramillo/Ortiz/Melendrez**

Results:

| Tasks | Q1 | Q2 | Q3 | Q4 | Goal |
|-------|----|----|----|----|------|
|       |    |    |    |    |      |
|       |    |    |    |    |      |
|       |    |    |    |    |      |
|       |    |    |    |    |      |

# Glossary

**ACFR:** Annual Comprehensive Financial Report — A detailed annual financial report prepared by government entities in accordance with GASB standards over the fiscal year.

**AMI:** Automated Meter Infrastructure — A system of smart meters, communication networks, and data tools enabling real-time or near-real-time water-use monitoring and billing.

**ASR:** Aquifer Storage and Recovery — A method of storing treated water in an aquifer for later recovery during high-demand or drought periods.

**AWWA:** American Water Works Association — A professional organization dedicated to improving water quality and supply through standards, research, and training.

**CAMP:** Comprehensive Asset Management Plan — A long-term plan that inventories assets, evaluates condition and risk, and outlines strategies for maintenance, replacement, and capital investment.

**CDL:** Commercial Driver License — A license required to operate large or specialized vehicles such as utility trucks or equipment transport vehicles.

**CMOM:** Capacity, Management, Operation, and Maintenance — A framework for managing wastewater collection systems to reduce overflows and improve system reliability.

**DBP:** Disinfection Byproduct — Chemical compounds formed when disinfectants react with natural organic matter in water. Regulatory limits often require DBPs to remain below 60 µg/L (ppb).

**EUM:** Effective Utility Management — A management framework for water and wastewater utilities focused on performance improvement across ten key attributes.

**KPI / KPIs:** Key Performance Indicators — Quantifiable metrics used to evaluate progress toward operational, financial, or strategic goals.

**Maximo** — Asset Management System (IBM Maximo) — A computerized maintenance management system (CMMS) used to track assets, work orders, maintenance schedules, and lifecycle costs.

**mg:** Milligram — A unit of mass equal to one-thousandth of a gram.

**mg/L:** Milligrams per Liter — A common concentration unit in water quality analysis, roughly equivalent to parts per million (ppm) in dilute solutions.

**MOU:** Memorandum of Understanding — A formal agreement outlining roles, responsibilities, and cooperative intentions without creating a binding contract.

**NIST Cybersecurity Framework:** National Institute of Standards and Technology Cybersecurity Framework — A widely used framework that helps organizations identify, protect, detect, respond to, and recover from cybersecurity threats.

**NMED:** New Mexico Environment Department — The state agency responsible for environmental protection, including water quality, air quality, and regulatory compliance.

**NTU:** Nephelometric Turbidity Unit — A unit used to measure turbidity (cloudiness) in water based on light scattering.

**OSHA:** Occupational Safety and Health Administration — The federal agency responsible for ensuring safe and healthy working conditions through regulations, training, and enforcement.

**PEN Test:** Annual Penetration Test — A cybersecurity assessment in which ethical hackers attempt to exploit vulnerabilities to evaluate system security.

**PNM TOD Rate:** Public Utility of New Mexico Time of Day Rate — A rate structure where electricity costs vary by time of day to encourage off-peak usage.

**ppb:** Parts per Billion — A concentration unit used for trace contaminants such as metals or disinfection byproducts.

**RAPP:** Rivers and Aquifers Protection Plan — A planning framework focused on protecting surface water and groundwater resources through policy, monitoring, and infrastructure strategies.

**RRPS:** Tijeras Reuse Reservoir and Pump Station — A reclaimed-water facility that stores and pumps treated reuse water for non-potable applications.

**SCADA:** Supervisory Control and Data Acquisition — A control system architecture used to monitor and operate water, wastewater, and industrial processes in real time.

**SWRP:** Southside Water Reclamation Plant — A major wastewater treatment facility responsible for treating and reclaiming municipal wastewater.

**TOC:** Total Organic Carbon — A measure of organic carbon in water, used as an indicator of water quality and treatment effectiveness.

**UCRC:** Upper Colorado River Commission — An interstate commission representing the Upper Basin states (CO, UT, WY, NM) in Colorado River management and compact compliance.

**µg/L (ppb):** Micrograms per Liter — A concentration unit used to measure trace levels of contaminants in water; equivalent to parts per billion (ppb).

**WPAB:** Water Protection Advisory Board — A board that provides guidance on water planning, watershed protection, and long-term resource management.

**Fiscal Year 2027**  
**July 1, 2026 – June 30, 2027**

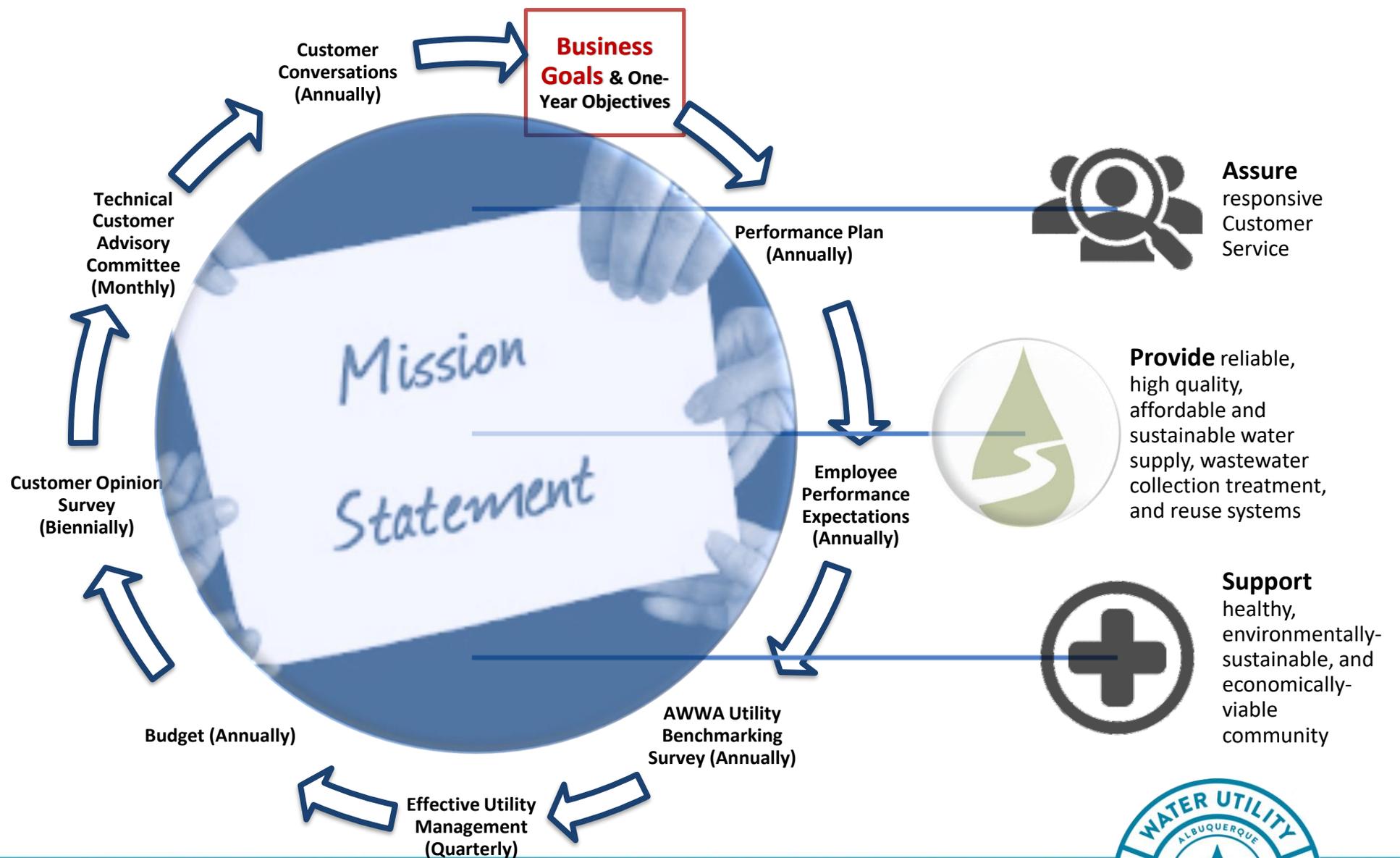


# **Water Authority Business Goals/ One-Year Objectives**



# Strategic Planning, Budgeting & Improvement Process

**NOTE:**  
One-year Objectives are NOT Policies



# Water Authority Business Goals

- Goals are based on AWWA business model
- Model characterizes the work of a typical water and wastewater utility around five business systems:
  - Water Supply & Operations
  - Wastewater Collection & Operations
  - Customer Relations
  - Business Planning & Management
  - Organizational Development



**American Water Works  
Association**

*Dedicated to the World's Most Vital Resource*



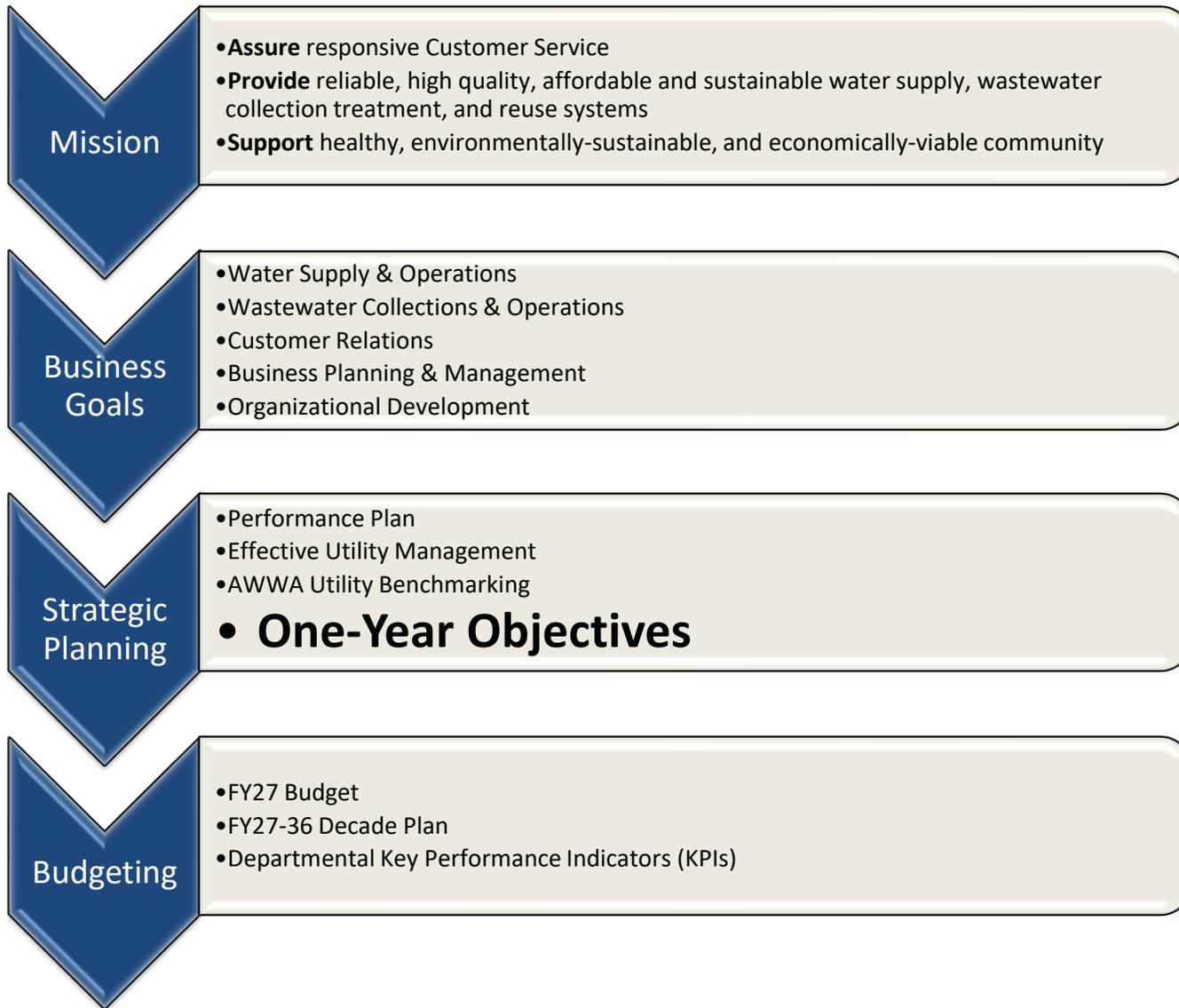
# Water Authority Business Goals, cont.

- Definitions of Business Goals:
  - **Goal 1** – Provide a reliable, safe, affordable, and sustainable water supply by transitioning to renewable supplies and minimizing long term environmental impacts on the community and natural resources while ensuring the ability of the community to grow in a responsible manner.
  - **Goal 2** - Provide reliable, safe, and affordable wastewater collection, treatment and reuse systems to protect the health of the Middle Rio Grande Valley by safeguarding the regional watershed, minimizing environmental impacts, and returning quality water to the Rio Grande for downstream users
  - **Goal 3** – Provide quality customer services by communicating effectively, billing accurately, and delivering water and wastewater services efficiently based on understanding the needs and perceptions of our customers and the community at large.
  - **Goal 4** – Maintain a well planned, managed, coordinated, and financially stable utility by continuously evaluating and improving the means, methods, and models used to deliver services.
  - **Goal 5** – Sustain a well informed, trained, motivated, safe, organized, and competitive work force to effectively meet the expectations of the customers, community, and Board in accordance with adopted policies and mandates.

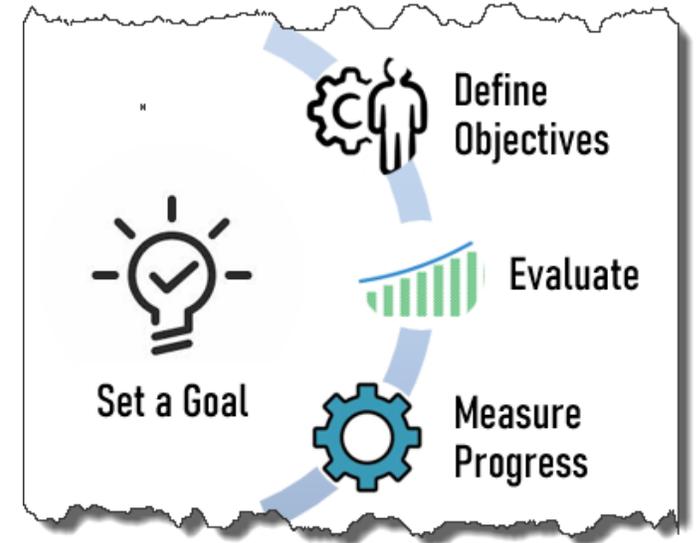


# Budgeting, Strategic Planning, and Business Goals

## To achieve the Water Authority's Mission



# FY27 One-Year Objectives



- Categorized into the 5 business system goals
- Related to completing projects or improving programs
- Identify performance gaps during the budget process by allocating and prioritizing resources
- Help develop improvement processes to be more efficient and effective in operations and service delivery



# Examples of One-Year Objectives

- Goal 1 – Water Supply & Operations

- Objective 1.2

To quantify reservoir leakage and prepare for system-wide reservoir rehabilitation projects for 65 reservoirs (approximately 10-to-15-year rehabilitation program):

- Utilize the hydraulic model to identify system constraints by isolating up to 5 reservoirs per year and presenting results to Plant and Field Operations for field investigations by Q2 of each fiscal year starting in FY27.
    - Perform field investigations, exercise valves and trial reservoir isolations for up to 5 reservoirs during Q2 and Q3 of each fiscal year starting in FY27.
    - During the trial reservoir isolations, isolate the reservoirs for multiple consecutive days to identify potential leakage rates and other constraints for taking reservoirs out of service for future rehabilitation work (up to 6-month outage per reservoir).



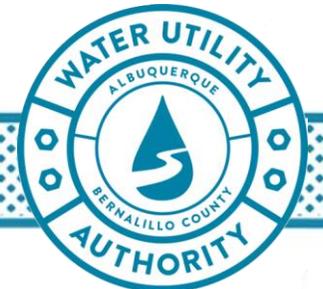
# Examples of One-Year Objectives

- Goal 2 – Wastewater Collection & Operations

- Objective 2.8

Review the Waste Hauling Oversight & Pretreatment processes with SWRP plant staff to identify improvements in the ability to limit and enforce against prohibited waste that is dumped at septage receiving by the end of the 4th Quarter of FY27.

This review will include administrative and technical process reviews as well as any necessary changes to the Sewer Use and Wastewater Control Ordinance that may be necessary to implement changes.

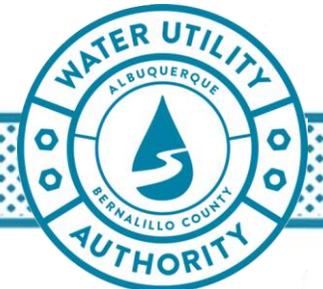


# Examples of One-Year Objectives

- Goal 3 – Customer Relations

- Objective 3.3

Increase “HomeConnect” enrollment and enhance the digital customer experience by the end of the 4th Quarter of FY27, using the platform to strengthen customer awareness of water-conservation practices.



# Examples of One-Year Objectives

- Goal 4 – Business Planning & Management

- Objective 4.6

Complete the update of the Comprehensive Asset Management Plan (CAMP) by the end of the 4th Quarter of FY27 to include the following tasks:

- Update asset condition scoring and monitoring framework
- Develop integration with existing asset registry data – Maximo
- Explore feasibility of energy and chemical usage cost analysis
- Update Fleet Maintenance and Compliance Equipment CAMPs



# Examples of One-Year Objectives

- Goal 5 – Organizational Development

- Objective 5.8

Deliver a tailored program of monthly safety trainings that addresses the unique operational risks, hazards, and OSHA regulatory requirements specific to each division by the end of the 4th Quarter of FY27. This approach represents a refinement of the existing training program, shifting from general safety topics to a more focused strategy.

Topics include, but are not limited to, excavation safety, electrical safety, fall protection, chemical hazard awareness, confined space entry, and Commercial Driver License (CDL) training certifications.

Attendance will continue to be tracked through the Learning Management System (LMS) to ensure compliance and engagement.





**Questions?  
Welcome  
TCAC Input &  
Feedback**

