

Line #	Audit Name	Action Item Owner	Ref #	Sub Ref #	Finding	Summary of Recommendation	Priority Ranking (H, M, L)	Status	Recent Updates/Notes
294	2021 Permitting Best Practices Audit	Community Projects Review Unit (CPRU)	2		F2: CPRU's Permit Process Could be Better at Meeting Customer and its Own Expectations for Timeliness and Communication - Permittees Want Faster Permit Processing and Better Communication with Applicants - CPRU Has Mixed Success in Meetings Its Goals for Timely Permit Processing F3: Timeliness Concerns Attributed to Multiple Factors - Engineers Spend More Time Reviewing Permits - Bottlenecks Occur at the End of the Permit Review Process - Permit Applicants Experience Challenges in Meeting Insurance Requirements - Some Permit Applications Are Not Recorded on a Timely Basis - Permit Review Activities Need Better Standardization and Clarity - Permit Processing is Primarily a Manual Process - CPRU Does Not Consistently Plan for Large Reviews	The CPRU Manager should complete standardization of permit review policies, practices, roles, and responsibilities.	Low	Pending/Underway	Management Response: Management agrees with the recommendation. CPRU will update and complete the existing permit review policies, practices, and instruction guidance for various types of transactions to bring consistency in the review of projects. Target Implementation Date: June 2022 Auditor Response: Management's response generally addresses the recommendation. A follow-up audit to assess CPRU's efforts to implement this recommendation should be included in the annual audit work plan for 2023. Status 08/2026: Ongoing The Water Resources Protection Manual update is not anticipated to be completed until December 2026. Revised Target Implementation Date: December 2026
297	2021 Permitting Best Practices Audit	Community Projects Review Unit (CPRU)	5		F2: CPRU's Permit Process Could be Better at Meeting Customer and its Own Expectations for Timeliness and Communication - Permittees Want Faster Permit Processing and Better Communication with Applicants - CPRU Has Mixed Success in Meetings Its Goals for Timely Permit Processing F3: Timeliness Concerns Attributed to Multiple Factors - Engineers Spend More Time Reviewing Permits - Bottlenecks Occur at the End of the Permit Review Process - Permit Applicants Experience Challenges in Meeting Insurance Requirements - Some Permit Applications Are Not Recorded on a Timely Basis - Permit Review Activities Need Better Standardization and Clarity - Permit Processing is Primarily a Manual Process - CPRU Does Not Consistently Plan for Large Reviews	The CPRU Manager should assign customer liaison responsibilities (to one or two individuals) to ensure consistent and timely communication on permit applications to help meet customer expectations.	Low	Pending/Underway	Management Response: Management partially agrees with the recommendation. In general, the assignment of liaison responsibilities will increase confusion and will take more time of the staff reviewing the permit to provide and explain the details of customer's request to the liaison. CPRU Manager will explore the role of a liaison where this may increase efficiency and coordinate with IT to explore other tools to integrate with the database (See response to Recommendation 6). CPRU Manager will request additional resources from Management. Use of additional technicians to assist in background research for projects and review of routine, low-risk tasks will free up time to allow engineers to ensure consistent and timely communication on permit applications. Target Implementation Date: October 2022 Auditor Response: Management's response generally addresses the recommendation. The use of additional resources – either a liaison or technician(s) – to perform provide customer service, would allow engineers more time to perform the technical reviews of permit applications and help to reduce review times. These additional resources may be critical to meeting customer's expectations while Valley Water's planned implementation of a new information systems for customer resource management (CRM) is undertaken that will also interface with another new information system that is planned to replace the current CPRU database. A follow-up audit to assess CPRU's efforts to implement this recommendation should be included in the annual audit work plan for 2023. Status 08/2026: Ongoing CPRU, IT and the Timmons Group are finishing discovery and feedback of CPRU work processes. The necessary procurement and agreements to implement IT integrations for plan review (DigEplan), document storage (OnBase) and Cityworks upgrade to Unity are executed. The current estimated Go Live for Cityworks is April 2027. Revised Target Implementation Date: Recommendation 6--April 2027
298	2021 Permitting Best Practices Audit	Community Projects Review Unit (CPRU)	6		F4: Local Agencies' Strategies Could Benefit Valley Water - Some Agencies Utilize Online Customer Service Portals to Upload Permit Application and to Check Permit Status - One Agency Uses a Project Coordinator to Facilitate Communication and Timely Processing - Other Agencies Identify Themselves Differently; Renaming CPRU May Avoid Confusion - Other Agencies Outreach Annually to Publicize Agency's Permit Services	The CPRU Manager, in collaboration with Valley Water Information Technology Unit, should continue efforts to identify and implement the solutions for desired functionality needed to strengthen permit processing, which include: a. Electronic submission of permit applications and supporting documents that automatically creates an electronic permit review file. b. Expanded search function for researching past projects and permits. c. Customizable dashboards and/or reports that facilitate management oversight of permit processing timeliness, invoice aging, and other measures of performance. d. Tools, such as a request form or ticketing system, to help CPRU track requests for services in addition to permit reviews received from internal and external stakeholders. e. Ability for customers to self-check the status of their applications and other service requests through interface of the new customer resource management system with the new document management system. f. Minimize the administrative burden of tracking and reporting time spent on permit review and other asset protection services by CPRU and other Valley Water units.	Low	Pending/Underway	Management Response: Management agrees and will approach the implementation of this recommendation in phases: 1. Modernize processes, support submission of permit applications, track requests, complete reviews, facilitate online reporting for customers and reduce administrative burden of tracking and reporting through the selection and implementation of a new CPRU online portal. Management will consider options to include this functionality within other active projects such as the Wells Management System Upgrade and Access Valley Water. (6a, d, e, f) 2. Expand search/research functions and reduce administrative burden via the implementation of the Data Consolidation Capital Project Proof of Concept currently underway and scheduled for completion in October 2022. (6b, f) 3. Create Dashboards and reports via the implementation of the Data Consolidation Capital Project Proof of Concept currently underway and scheduled for completion in October 2022, the ERP Capital Project currently underway. (6c)" Target Implementation Date: Varies Auditor Response: Management's response generally addresses the recommendation. A target date to complete all activities should be established and a follow-up audit to assess CPRU's efforts to implement this recommendation should be included in the annual audit work plan for 2023. Status 08/2026: Ongoing. 1. Ongoing. Work with the Timmons Group to implement Cityworks is underway. Timmons currently estimates that the new online portal will Go Live by Apri; 2027. Cityworks will include all the functionality recommended by the audit items a thru e. Cityworks will reduce staff labor answering questions from customers on project status, allow for automated customer guidance on how to submit a complete application, and allow for dashboards to monitor and track customer submittals and timelines which the current database cannot do. 2. Ongoing. CPRU has specified that its online customer service portal must have expanded and agile search capabilities. 3. Ongoing. CPRU has specified that its online customer service portal must have configurable dashboards for management. Revised Target Implementation Date: April 2027

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304	2021 Permitting Best Practices Audit	Community Projects Review Unit (CPRU)	12		F5: Update Needed for Fee Schedule and Cost Recovery Strategy - Valley Water Recovers Only a Small Percentage of CPRU's Operating Costs from Permit Fees and Other Services - Updating Valley Water's Fee Schedule, Based on a Fee Study, Could Help Ensure Appropriate Cost Recovery - Updated Guidance for Billing for Staff Time Spent Reviewing Permits is Needed - Other Local Water Agencies Charge Hourly Rate Instead of Flat Fee for Inspections	The CPRU Manager should adopt a risk-based permit review strategy to reduce processing time for low-risk, repetitive types of permit applications. Clarify in the strategy how time spent on the review of permit applications and other processing tasks should be tracked and invoiced.	Low	Pending/Underway	Management Response: Management agrees with this recommendation. a. CPRU Manger will consider strategies to reduce processing time for low-risk, repetitive types of permit applications. CPRU Manager and experienced staff, through permit guidance instructions will add further clarity for new and less experienced staff and reduce ambiguity in the process. (Target Date: June 2022) b. Implementation of Recommendation 6 via the implementation of the Data Consolidation Capital Project Proof of Concept and the ERP Capital Project and the results of the fee study with the implementation of Recommendation 11, and results from Recommendation 13 will provide better information and insight to strategize the tracking and invoicing of permit applications and other processing tasks. (Target Date: June 2023 depending on the research outcome in Recommendation 13) Target Implementation Date: Varies Auditor Response: Management's response generally satisfies the recommendation. A follow-up audit to assess CPRU's efforts to implement this recommendation should be included in the annual audit work plan for 2023. Status 08/2026: a. Complete b. Ongoing. See Recommendation 6. Revised Target Implementation Date: Recommendation 6—April 2027.
305	2021 Permitting Best Practices Audit	Community Projects Review Unit (CPRU)	13		F6: Robust Internal Control Framework Needed to Ensure Accurate and Timely Invoicing and Collection of Fee Payments	The CPRU Manager and the Chief Financial Officer should seek to identify an IT solution to ensure timely and accurate recording of invoices, payments, and deposits. One option to consider is to use Valley Water's core financial management information system.	Low	Pending/Underway	Management Response: Management agrees and will engage in the research, specification, selection, procurement, and implementation of a comprehensive tool capable of ensuring accurate recording of invoices, payments, and deposits. Target Implementation Date: June 2023 depending on research outcome. Auditor Response: Management's response generally addresses the recommendation. A follow-up audit to assess CPRU's efforts to implement this recommendation should be included in the annual audit work plan for 2023. Status 08/2026: Ongoing. See Recommendation 6 for IT upgrade status. CPRU has specified that its online customer service portal must have an ability to integrate invoicing. Revised Target Implementation Date: Recommendation 6—April 2027
306	2021 Permitting Best Practices Audit	Community Projects Review Unit (CPRU)	14		F6: Robust Internal Control Framework Needed to Ensure Accurate and Timely Invoicing and Collection of Fee Payments	The CPRU Manager, in coordination with the Chief Financial Officer, should establish processes for invoicing and collection of payments that includes a robust framework of financial management internal controls, in particular the segregation of duties for billing and collections; cash management; monitoring of aging receivables; and reconciliation.	Low	Pending/Underway	Management Response: Management agrees and will approach the implementation of this recommendation in phases: 1. Implement the suggested financial management internal controls under the current CPRU data base system, (Target date – July 2021). 2. Engage a consultant to assist in the development of a billing and revenue collection policy that incorporates best practices (Target date – March 2022). 3. Implement an IT solution for invoicing that is linked to Valley Water's core financial system and aligns with Valley Water's billing and revenue collection policy (Target date – June 2023 depending on the research outcome (R13) Target Implementation Date: Varies. Auditor Response: Management's response generally addresses the recommendation. A follow-up audit to assess CPRU's efforts to implement this recommendation should be included in the annual audit work plan for 2023. Status 08/2026: a. Complete. b. Complete. c. Ongoing. See Recommendation 6 for IT upgrade status. CPRU has specified that its online customer service portal must have an ability to integrate invoicing. Currently CPRU has to create invoices in Oracle and MuniBilling which created additional work to address the recommendation in the interim. Revised Target Implementation Date: Recommendation 6--April 2027
344	2023 Capital Improvement Program Performance Audit	Business Planning and Analysis (CIP Team)	1	b	Schedule and spending targets established in the CIP 5-Year Plan may not be achievable.	Improve CIP goal attainment, including the likelihood that expenditure and schedule targets are met, by identifying specific staff and contract resources required to complete projects, including the type of resource, quantity of resource, and timing of the need for the resource	High	Pending/Underway	Management agrees and believes this recommendation will be addressed through the implementation of our new resource planning/staff forecasting tool VEMO. 07/21/26: The VEMO Tool will not be utilized as a staff forecasting tool for VW capital projects. A CIP Long-term Forecasting (LTF) Tool is under development in Vena for Capital Projects for managers to use for labor hours and services & supplies forecasting over a 15-year outlook, for all Capital Projects. The new target date for full implementation of this recommendation is Q4, FY27.

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345	2023 Capital Improvement Program Performance Audit	Business Planning and Analysis (CIP Team)	1	c	Schedule and spending targets established in the CIP 5-Year Plan may not be achievable.	Improve CIP goal attainment, including the likelihood that expenditure and schedule targets are met, by conducting and formally memorializing analyses of common cost and schedule delays in the Lessons Learned database in ProjectMates and share results agency-wide	High	Completed/Implemented	Management agrees and will implement this recommendation through ProjectMates. 07/21/26: Complete. VW Management believes this remmendation is complete as Lessons Learned trainings are on-going, Change Management Categories are tracked/monitored annually, and Construction Cost Estimating Trainings are held annually.
348	2023 Capital Improvement Program Performance Audit	Business Planning and Analysis (CIP Team)	2	c	Valley Water’s performance in delivering capital projects is obscured by the lack of a robust performance measurement system	Develop a performance measurement system that effectively demonstrates Valley Water’s performance in achieving the goals of the CIP and the capital infrastructure goals of its master plans. This includes incorporating anticipated timelines within which the results of recent process improvements are expected to be evident and measurable in CIP outcomes.	Medium	Pending/Underway	Management agrees. Management is proposing a two-year implementation period for ProjectMates, with a follow-up audit to validate success (e.g. follow-up audit to be initiated in FY26 to allow time for implementation of ProjectMates and Vemo). 07/21/26: Performance Metrics have been identified and will be reevaluated following the completion of a CIP Benchmarking Study, which is scheduled to be completed this September. A new tracking and reporting tool is currently under development. The new target date for full implementation of this recommendation is Q2, FY27.
365	2024 Human Resources	HR Deputy	1	c	Due to leadership changes and insufficient communication, HR employees struggle to trust Department leadership	Review HR employee classifications for HR staff to determine whether their job function suggests they should be confidential positions.	Medium	Completed/Implemented	Although Management agrees with this finding, we believe there is more to it. Valley Water's employment engagement survey conducted in 2023 resulted in a focus on trust and communication as an entire agency. Over the last year, Human Resources (HR) has diligently focused on these areas. The annual 2024 department retreat concentrated on this area, and all employees committed to adding 2025 performance goals, a clear sign of our collective dedication to improving trust and communication. C. Position Evaluation- Management will review and evaluate the positions within the Human Resources Department to address confidentiality. 06/25/2026 Status: Completed. District Counsel reviewed the definition of “Confidential” employees related to the Ralph C. Dills Act (Dills Act) and Meyers Miliias Brown Act (MMBA) and provided a recommendation. Human Resources is in the process of implementing this recommendation. Human Resources developed and implemented new confidentiality survey and evaluation process.
368	2024 Human Resources	Human Resources & IT	3	a	The Department is experiencing challenges using Infor, the District’s enterprise resource planning system (ERP), as its human resource information system (HRIS) due to challenges with system implementation and lack of system integration.	As the District seeks a new ERP system, ensure that a representative from HR with a strong understanding of system needs is highly involved in evaluating system capabilities against HR’s system needs.	High	Completed/Implemented	Management agrees with the recommendations and are in process of obtaining an ERP to address our HRIS deficiencies. Human Resources recently implemented an HRIS unit within the department. Not having the unit greatly hindered the ability to understand the functionality and interfaces needed for an effective and efficient ERP system. Key HR staff have been identified to be part of the evaluation and implementation of the ERP. In addition to an ERP system Valley Water will contract with an implementation partner certified in implementing the solution provider’s software. The Request for Proposal (RFP) for both the software solution and the implementer was published in January 2025. 06/25/2026 Status: Completed. RFP completed Q1 2025. Dayforce selected.
369	2024 Human Resources	Human Resources & IT	3	b	The Department is experiencing challenges using Infor, the District’s enterprise resource planning system (ERP), as its human resource information system (HRIS) due to challenges with system implementation and lack of system integration.	After a new system is selected, conduct a thorough implementation process to support successful system adoption.	High	Pending/Underway	Management agrees with the recommendations and are in process of obtaining an ERP to address our HRIS deficiencies. Human Resources recently implemented an HRIS unit within the department. Not having the unit greatly hindered the ability to understand the functionality and interfaces needed for an effective and efficient ERP system. Key HR staff have been identified to be part of the evaluation and implementation of the ERP. In addition to an ERP system Valley Water will contract with an implementation partner certified in implementing the solution provider's software. The Request for Proposal (RFP) for both the software solution and the implementer was published in January 2025. 06/25/2026 Status: Ongoing. Selected ERP and Executive Steering Committee completed kickoff. Selected ERP and Project team completed kickoff. Selected ERP and Project team implementing the first phase of the implementation.

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373	2024 Renewed SCW Prog	CFO, Financial Planning & Management Services	1		The audit identified a minor procedural discrepancy in how Valley Water files Measure S tax resolutions with Santa Clara County. While the measure specifies filing with the Auditor-Controller and County Recorder, current practice is to file with the County Clerk-Recorder and Tax Assessor, reflecting changes in County office structure.	Formally document the assessment that the current process meets the functional intent of Measure S, Provision C. Furthermore, incorporate clarifying language into future Board resolutions to explicitly state the specific County offices where certified copies will be filed. Document the rationale supporting the current filing process and include clarifying language in future Board resolutions specifying why certified copies are filed with the current County offices.	Low	Completed/Implemented	Response: Management agrees with the recommendation and staff will implement this recommendation. Implementation Date: Q4, FY26 for FY2026-2027 Annual Rate Setting Report (May 2026). 7/16/2026: Completed. Staff validated that internal process guidelines correctly document the Santa Clara County Clerk-Recorder and Tax Assessor offices as the appropriate offices for filing SCW Measure S tax resolutions. Staff also verified that the FY2026-27 Measure S tax resolution was prepared using the certified resolution template and filed timely with the Santa Clara County Clerk-Recorder office.
374	2024 Renewed SCW Prog	CFO, Financial Planning & Management Services and AO, Office of Integrated Water Management – Business Planning and Analysis Unit	2		The process for reconciling SCW capital project funding allocations with adjustments approved in the CIP Plan needs improvement to support accurate and timely reporting in the SCW Annual Report.	Revise methods for identifying, reconciling, and reporting SCW funding allocation adjustments. Establish a corrected baseline, create a formal reconciliation process for CIP changes, require management review before publication, and clarify public reporting expectations in the Change Control Process.	High	Completed/Implemented	Response: Management agrees with the recommendation and staff will implement the recommendation. Implementation Date: Q4, FY26 7/16/26: Completed in Q4 in accordance with the management response.
375	2024 Renewed SCW Prog	AO, Office of Integrated Water Management – Business Planning and Analysis Unit	3		A clearer crosswalk is needed between CIP and SCW project schedule adjustments to improve transparency for stakeholders. Currently, differences in reporting cycles and formats make it challenging to track the impact of schedule changes on KPI delivery.	Continue the practice of clearly and visually differentiating the milestone for achieving a project’s KPI from the milestones for other project phases; illustrate and explain how adjustments to capital project schedules in the CIP Plan impact the delivery schedule for the corresponding SCW Program KPI; when presenting the annual CIP Plan for Board approval, explicitly report on how proposed schedule changes will affect the KPI delivery dates for SCW projects; and update the Change Control Process to clarify how schedule changes will be made publicly available through reporting and posting on the Program’s web page.	High	Completed/Implemented	Response: Management agrees with the recommendation and staff will implement the recommendation. Implementation Date: Q4, FY26 7/16/26: Completed in Q4 in accordance with the management response.
377	2024 Renewed SCW Prog	COB, Office of the Clerk of the Board	5		Ongoing vacancies on the IMC have made it challenging to consistently meet quorum requirements and distribute workload among members.	Partner with the Board to enhance recruitment strategies, to identify, attract, and recruit qualified candidates.	Medium	Pending/Underway	Response: Management agrees with the recommendation and staff will explore additional recruitment strategies in partnership with the Board of Directors. Implementation Date: Q4, FY27 7/16/26: Directors met with prospective applicants in Q4 of FY 2026 for vacant seats in District 4 and District 7. An appointment for the vacant District 4 seat will be going to the Board for approval on August 11, 2026. Three current IMC members were reappointed by the Board on June 9, 2026.
378	2024 Renewed SCW Prog	COO, Watersheds	6		Valley Water’s role in this externally led partnership, Project E5, has shifted from project lead to funding partner. The project’s existing management mechanisms, designed for direct project execution, may not be the most effective tools for managing this evolving role.	Implement a Strategic Decision & Risk Log to identify and monitor key decisions, document Valley Water’s official positions, assess associated risks, and guide proactive engagement.	High	Completed/Implemented	Response: Management agrees with the recommendation and where applicable, staff will develop and implement a Strategic Decision & Risk Log to formalize its partnership management. Implementation Date: Q4, FY26 7/20/2026: Completed. Staff have developed and implemented an internal-facing Strategic Decision & Risk Log which is periodically updated to reflect ongoing developments with the SFCJPA and high-level decisions being made by management.
379	2024 Renewed SCW Prog	COO, Watersheds	7		The KPI for Project E5 holds Valley Water accountable for a community outcome it no longer directly controls due to the transfer of leadership to the SFCJPA. The KPI, as currently worded, does not accurately reflect Valley Water’s role.	Continue to re-evaluate the KPI, shifting from an outcome-based metric to one that measures Valley Water’s specific, controllable contributions, such as a funding or partnership-based deliverable.	High	Pending/Underway	Response: Management agrees with the recommendation and staff will reevaluate Project E5: San Francisquito Creek Flood Protection KPIs to determine how best to reflect current realities. If it is determined that modifications to the KPIs are required, management will propose them in accordance with the Change Control Process. Implementation Date: Q4, FY27 7/16/26: On June 23, 2026, the Board initiated the public hearing process for a proposed KPI modification to reflect the current project responsibilities. The first hearing was held on July 14, 2026, with the second scheduled for August 11, 2026.

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380	2024 Renewed SCW Prog	DOO, Watersheds Operations and Maintenance Division	8		Inconsistent processes for entering and compiling operational data impacted the accuracy of reported performance figures. For Project F5, inconsistencies were noted in the initial entry of source data, while for Project D1, reported figures in the SCW Annual Report varied from the underlying data in the Maximo system.	Enhance procedures to ensure accurate data entry and processes for ensuring final reports align with source data.	Low	Completed/Implemente	Response: Management agrees with the recommendations and staff will develop a process to verify that the data entered is in alignment with the work performed. Implementation Date: Q4, FY26 7/20/26: Short Term: Implementation of a supervisory review for key data fields within Maximo work orders to verify accuracy data. Long Term (January 2027): Currently working with GIS and Maximo team to automate acreages from geospatial polygons to ensure data accuracy.
381	2024 Renewed SCW Prog	COO, Watersheds	9		KPIs could be improved to support long-term financial sustainability and more accurately reflect the scope of program activities. Project F1.1’s KPI represents a perpetual maintenance commitment, while KPIs for Projects D1 and F3 could be enhanced for clarity and scope.	Enhance review of KPIs to ensure they are financially sustainable, remain aligned with current project activities, and that their descriptions clearly articulate the project’s scope and deliverables.	Medium	Completed/Implemente	Response: Management acknowledges the recommendation. Staff is assessing related policies and processes. Depending on the outcome of those efforts, Valley Water may consider modifying the KPI in the current 15-year financial cycle or revisit it in the next 15-year financial cycle. Implementation Date: Q4, FY26 7/16/26: Completed. Following KPI review, the Board approved Project D1 and F3 KPI adjustments in accordance with the Change Control Process. Management determined that a KPI adjustment for Project F1.1 was not necessary and presented this recommendation to the BPMC, which supported the recommendation at its April 21, 2026, meeting.
382	2025 Water Conservation Program	Water Supply Planning and Conservation Unit	1		Valley Water’s Water Conservation team is understaffed compared to peer agencies, which may limit capacity to manage workloads and poses risk to achieving the District’s long-term conservation goals.	To ensure the Water Conservation team can meet the District’s long-term conservation goals, Valley Water should consider adding at least five additional staff to the Water Conservation team who are dedicated to stakeholder engagement and administrative and program support.	Medium	Pending/Underway	Response: This recommendation is consistent with the 2021 Water Conservation Strategic Plan findings, recommending an additional 6 full-time staff to meet the Board’s 2040 goal. In 2021, three full-time staff were added. Since the program meets its annual water savings metric, the remaining three positions are documented as unfunded needs in the budget process. Additionally with the adoption of the Board’s 2050 Target, an additional ten (10) full-time staff will need to be added to the program. Management will continue to monitor the programs progress towards meeting its annual metric to guide adding additional staff in a phased approach to be mindful of water rate affordability concerns. Implementation Date: Ongoing 6/26/2026: This recommendation is consistent with the 2021 Water Conservation Strategic Plan findings, recommending an additional 6 full-time staff to meet the Board’s 2040 goal. In 2021, three full-time staff were added. The remaining three positions are documented as unfunded needs in the budget process. Additionally with the adoption of the Board’s 2050 Target, an additional ten (10) full-time staff will need to be added to the program. Management will continue to monitor the programs progress towards meeting its annual metric to guide adding additional staff in a phased approach to be mindful of water rate affordability concerns.
383	2025 Water Conservation Program	Water Supply Planning and Conservation Unit	2		Valley Water employs a multiple channel outreach approach similar to its peers but does not currently have a formal integrated communications strategy. Along with limited staffing capacity, this may constrain its ability to effectively engage diverse and underserved populations and fully realize the potential of its water conservation programs.	To build on the District’s existing outreach activities, the Water Conservation team should work with other District departments, including the Office of Communications, to develop and implement a formalized, comprehensive, data-driven strategic engagement strategy that clearly defines target audiences, messaging priorities, and outreach methods.	Medium	Pending/Underway	Response: Management agrees with this recommendation and will incorporate the development of a data-driven strategic engagement strategy as part of the 5-year update to the 2021 Water Conservation Strategic Plan. A RFP is under development with the goal of hiring a consultant in late 2026. Implementation Date: 2026 - 2028 6/26/2026: An RFP was issued, a consultant was selected, and negotiations are expected to be completed in late 2026.
386	2025 Water Conservation Program	Water Supply Planning and Conservation Unit	3	c	The effectiveness of Valley Water’s water conservation programs is constrained by capacity challenges and opportunities to improve alignment with the following key support departments: Procurement, Communications, and IT.	To facilitate better coordination, the Water Conservation team should formalize collaboration efforts with the Communications department by establishing a clear framework that defines roles, responsibilities, and decision making authority for the annual water conservation campaign.	Low	Pending/Underway	Response: The water conservation team meets with the Procurement, Communications, and IT teams on a monthly basis to facilitate coordinating various work activities and ensure that existing roles and responsibilities are well defined. During times of the development of water conservation campaigns, which are now year-round, meetings with the communications team occur every two weeks. With respect to communications, the Water Conservation Unit leads: campaign priorities and campaign funding. Creative development is collaborative and campaign execution and media buys are lead by the Communications team. Management will incorporate establishing a clear framework, roles, responsibilities and decision-making authority as part of the RFP under finding #2. Implementation Date: 2026 - 2028 6/26/2026: Pending/Underway

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