

FY2025-26 AUDIT RESULTS

October 28, 2026

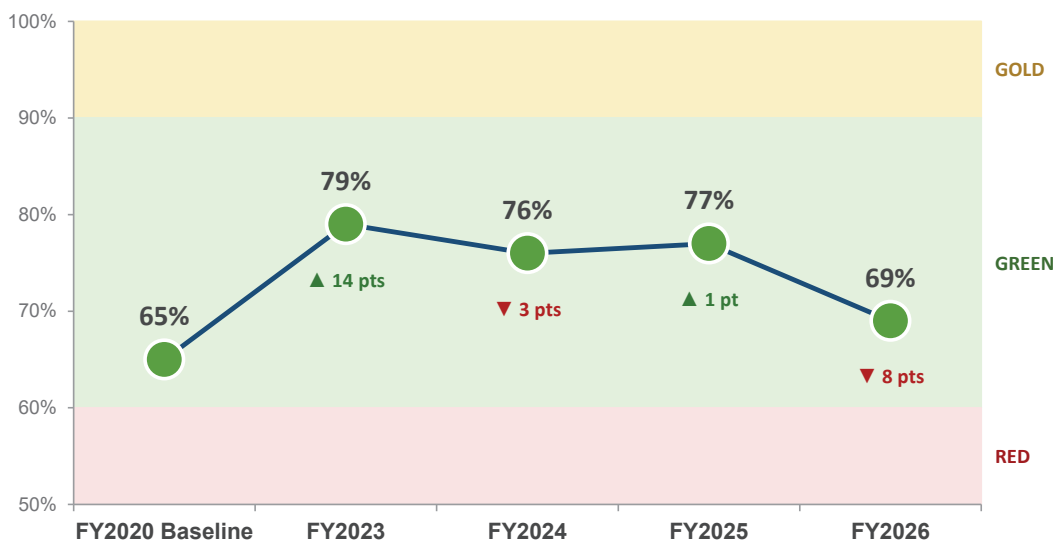
Amie Drotning, PWLF

Harry Lorick, PE, PWLF



1

ANNUAL PERFORMANCE AUDIT: THE ROAD TO GOLD



GOLD

GREEN

RED

Key takeaways

- +4 pts vs. FY2020 baseline
- Peak: 79% (FY2023), 11 pts from Gold
- FY2026 down 8 pts, still Green
- Gap to Gold: 21 pts

Rating bands: Red 59% or below, Green 60–89%, Gold 90–100%. FY2021–FY2022 not shown. Point change vs. prior year shown under each score.

“Continuous improvement is better than delayed perfection.”



ADMINISTRATIVE SERVICES | PERFORMANCE RATING: 88

8 METRICS – 5 GOLD • 2 GREEN • 1 RED | PREVIOUS RATING: 85



RECOMMENDATIONS

NO. 1 – RESULTS FROM KPI's

- Expand KPI tracking and improve monitoring behaviors.
- Conduct a board workshop to refine metrics and ensure a more reliable, comprehensive performance audit.

NO. 6 - PUBLIC RECORDS REQUESTS COMPLIANCE

- Current system uses a strict gold (100%) or red (non-compliant) scale.
- Introduce a three-level performance scale to recognize mid-range green score.

3



CUSTOMER SERVICES | PERFORMANCE RATING: 53

6 METRICS – 1 GOLD • 0 GREEN • 3 RED • 2 N/A | PREVIOUS RATING: 93



RECOMMENDATIONS

NO. 1 – ADD ANOTHER METRIC TO THE GROUP

- Only two indicators from the CMMS database are currently used for evaluation.
- Work with North Ridge Group to add at least one additional metric to provide a more accurate and representative performance rating.

4



ENGINEERING | PERFORMANCE RATING: 64

12 METRICS – 3 GOLD • 4 GREEN • 4 RED • 1 N/A | PREVIOUS RATING: 79



RECOMMENDATIONS

NO. 3 – PROJECT HOURS

Monitor hours reported to projects versus overhead monthly and ensure appropriate time is tracked to each project.

NO. 4 - CONSTRUCTION INSPECTIONS

Refine and establish a process for updating and tracking "yellow cards" from inspection logs using MaintStar with document scanning to automate this process.

This would allow managers to monitor this metric in real-time and facilitate easier sampling and evaluation.

NO. 6 – EFFICIENCY OF PLAN CHECK

This enables the manager to monitor the metric in real-time throughout the year, this process can be automated and established in MaintStar for each project/work order.

Consider purchasing MaintStar plan check module to fully automate routing plan checks for review and approval.

5



ENGINEERING | PERFORMANCE RATING: 64

12 METRICS – 3 GOLD • 4 GREEN • 4 RED • 1 N/A | PREVIOUS RATING: 79



RECOMMENDATIONS

INDICATOR NO. 8 – PROJECT MANAGEMENT < \$400,000

Develop a process to monitor time charged to projects and a process to review with the project manager monthly. Consider providing guidance and education for Project Managers to manage their projects efficiently.

INDICATOR NO. 10 – FILE COMPLETED PROJECTS PROMPTLY

Refine and establish a process for updating and tracking "yellow cards" from inspection logs using MaintStar with document scanning to automate this process.

This would allow managers to monitor this metric in real-time and facilitate easier sampling and evaluation.

6



FINANCIAL SERVICES | PERFORMANCE RATING: 55

7 METRICS – 1 GOLD • 2 GREEN • 4 RED | PREVIOUS RATING: 75



RECOMMENDATIONS

NO. 4 – FILE COMPLETED PROJECTS IN A TIMELY MANNER

- A more thorough monitoring process should be established, and Engineering and Finance should provide monthly joint reports to the GM on the project's progress, including when it is closed.

NO. 5 – MONTHLY CLOSE DOCUMENTATION

- Develop a checklist with supporting information to enable the Auditor to review and score the performance compared with the target.
- Establish what actions and documentation are needed to perform a monthly close.

7



HUMAN RESOURCES | PERFORMANCE RATING: 75

11 METRICS – 5 GOLD • 4 GREEN • 2 RED | PREVIOUS RATING: 67



RECOMMENDATIONS

INDICATOR NO. 8 – ANNUAL EMPLOYEE PERFORMANCE EVALUATIONS

- Human Resources should maintain a centralized log of employee performance evaluation due dates and monitor completion status throughout the year. The log should be reviewed monthly, with the status of outstanding evaluations reported to the General Manager.

INDICATOR NO. 9 - ANNUAL EMPLOYEE ENGAGEMENT SURVEY

- Although employee engagement improved from the prior year, the District's 40th percentile rating remains relatively low compared with the industry benchmark. Human Resources should review the factors contributing to the survey results and develop a focused plan to address areas where employee perceptions remain below desired levels.

8



PUBLIC AFFAIRS | PERFORMANCE RATING: IP



9 METRICS – GOLD • GREEN • RED | PREVIOUS RATING: 59

RECOMMENDATIONS

In Progress

9



WATER OPERATIONS | PERFORMANCE RATING: 80



13 METRICS – 7 GOLD • 2 GREEN • 3 RED • 1 N/A | PREVIOUS RATING: 93

RECOMMENDATIONS

NO. 2 - WORK REPORTING ACCURACY

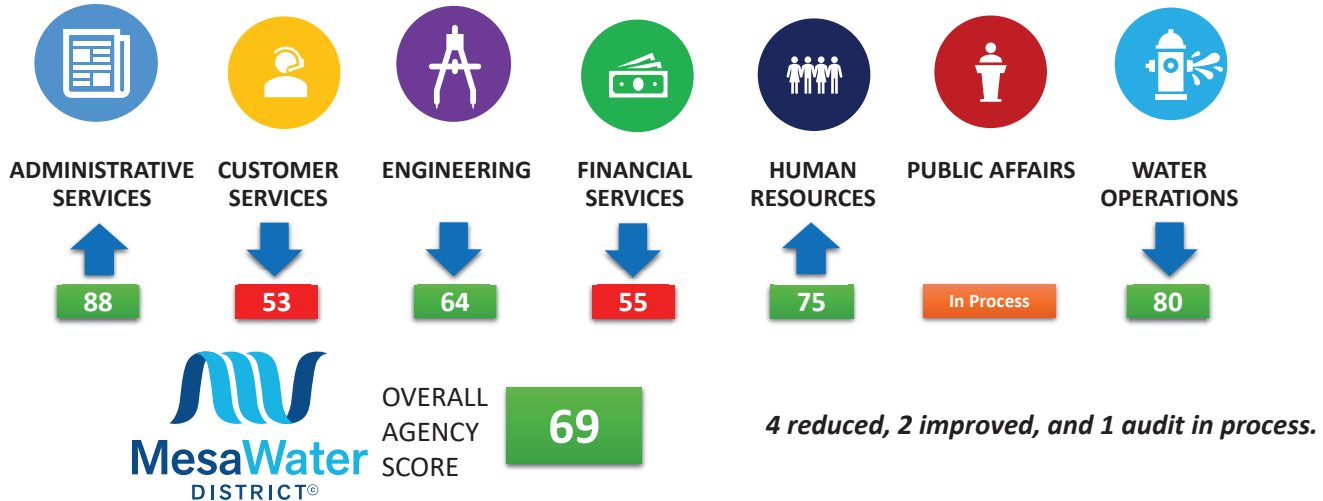
- Daily reporting is now being input directly into MaintStar; another process should be considered, as the accuracy of this information is a critical component in the use of this management system.
- QC reports and/or a dashboard should be set up to verify data entry for various data entry components.

CONSIDERED A NEW INDICATOR FOR COMPLIANCE WITH PMs

- A key element in water operations is the PM tasks.
- Consideration should be given to establishing metrics for auditing the completion of PM/routine maintenance programs using MaintStar.
- Further metrics could be established to monitor the percentage of repairs versus PM work effort by utilizing GIS data to display, in a dashboard, to store and monitor the metrics.

10

OVERVIEW



11

CONCLUSION



Agency is improving in many key metrics but with new managers and training are needed.



Managers take these seriously and are applying them to their work tasks.



Opportunities exist for enhancement with 14 recommendations made.



Process that focuses on continuous improvement (highlights areas in need of improvements).

12

12

QUESTIONS?

Amie Drotning, PWLF

Harry Lorick, PE, PWLF

LA Consulting, Inc.

Ph: (310) 374-5777

adrotning@laconsulting.com

hlorick@laconsulting.com

www.laconsulting.com



MesaWater
DISTRICT®



Consulting, Inc.

We Help Public Works Work!