



**Goals, Objectives, and Performance Measures/Standards & Annual Reporting Form
October 1, 2024 – September 30, 2025**

1. COMMUNICATION AND COMMUNITY ENGAGEMENT

Goal 1.1	Access to Records and Documents
Objective	Ensure that meeting minutes and other public records are readily available and easily accessible to the public by completing monthly website checks.
Measurement	Monthly website reviews will be completed to ensure meeting minutes and other public records are up to date as evidenced by District Management’s records.
Standard	100% of monthly website checks were completed by District Management
Achieved	YES / NO
10/1/24 Comments	Website is up to date.

Goal 1.2	Improve Communication
Objective	Develop strategic messaging and communication materials to support the mission of the District. Inform and educate community members and key stakeholders about the role and responsibilities of the District. Explore options regarding how to best achieve including but not limited to working with a professional marketing & public relations firm.
Measurement	Provide District Overview Power Point Presentation at one or more Board meetings. Provide a minimum of two (2) communication outlets to effectively share information and initiatives.
Standard	Maintain communication outlets.
Achieved	YES / NO
10/1/24 Comments	Contract with public relations firm will be brought to Board for approval in November.

2. OPERATION & MAINTENANCE OF INFRASTRUCTURE AND ASSETS

Goal 2.1	Operate & Maintain District Infrastructure and Assets
Objective	Insure, Operate, and Maintain District-owned Infrastructure and Assets.
Measurement	Ensure annual renewal of District Insurance Policy(s), ensure contracted services for District operations are in effect, and verify compliance with all required permits.
Standard	District insurance renewed and in force, contracted services in effect, and permits in compliance.
Achieved	YES / NO
10/1/24 Comments	District Insurance Policy was renewed last week of September.

Goal 2.2	Asset Management Software Integration
Objective	Complete asset management software integration. Onboard select contractors to utilize asset management software for “live” update of District assets.
Measurement	Complete asset management integration. Complete onboarding process for at least one select contractor.
Standard	Utilize asset management software to assist with operating budgets.
Achieved	YES / NO
10/1/24 Comments	ETM will be presenting asset management software at November meeting. Staff continues to utilize Cartegraph daily.

3. FINANCIAL TRANSPARENCY AND ACCOUNTABILITY

Goal 3.1	Annual budget preparation
Objective	Prepare a budget planning calendar that includes dates for additional agreed upon tasks (e.g. one-on-one meetings, Workshops, etc.). Prepare and approve the proposed annual budget before July 15 and adopt final budget by September 15.
Measurement	Present budget planning calendar to the Board by January meeting date. Proposed budget approved by the Board before July 15 and final budget adopted by September 15 as evidenced by meeting minutes and budget documents listed on District website and/or within district records.
Standard	100% of budget approval and adoption completed by the statutory and Collier County deadlines and posted to the District website.
Achieved	YES / NO
10/1/24 Comments	Manager has begun budget planning calendar.

Goal 3.2	Reserve Study
Objective	Finalize and approve the final Reserve Study by February 2025. Incorporate plan for funding reserves based upon reserve study.
Measurement	Present final reserve study to Board for approval by February 2025. Incorporate plan for funding reserves for Fiscal Year 2025/2026.
Standard	Reserve study finalized and updated as needed.
Achieved	YES / NO
10/1/24 Comments	Manager will meet with Reserve Advisors this month to discuss changes to finalize the reserve study.