

CASE STUDY

From Siloed Spreadsheets to a Unified \$500M Capital Program

East Bay Municipal Utility District (EBMUD) is the thirteenth largest retail water utility in the United States, serving 1.5 million customers across Alameda and Contra Costa counties. The district manages more than 500 active capital projects across both its water and wastewater systems and operates on a biennial budget cycle – with a published capital improvement program (CIP) that, before Invizion, had never extended beyond five years.

500+

CAPITAL PROJECTS SCORED

Water and wastewater systems unified

\$500M+

FY26 WATER CIP ALONE

First fully scored and ranked program

10-Year

PLANNING HORIZON

Extended from 5 years – first in agency's 100-year history

4 Months

FROM CONTRACT TO LIVE

Configured, trained, and active in the budget cycle

CLIENT East Bay Municipal Utility District

Challenge

When the current budget leadership team joined EBMUD, they inherited a process where the expense side of the capital program lived in one set of files and the revenue picture lived in a completely separate file managed by someone else in finance. Budget decisions emerged from informal negotiations — adjusting debt issuance and revenue assumptions back and forth until the numbers roughly reconciled.

Project prioritization was equally informal. A Capital Steering Committee of executives would review the high-level CIP and identify large projects to defer or cancel — based on judgment rather than data. There was no scoring framework, no cross-departmental ranked list, and no way to visually show leadership what the tradeoffs actually looked like. Their plan before Invizion: score 500+ projects in spreadsheets and sort the list manually.

OTHER

The Solution

EBMUD encountered Invizion through a professional network connection at the CIP Forum. The timing was tight: the Board approved the contract in August, and a preliminary CIP presentation was due in November — leaving just three months to get the system configured, staff trained, and data loaded. Invizion's implementation team trained key individuals in three to four two-hour sessions. Within weeks, the system was live and actively being used in the budget cycle.

The configuration gave EBMUD a single platform where project data, priority scores, schedule, and revenue constraints all coexisted — eliminating the silo between the expense and revenue views of the CIP for the first time. Department contacts for water and wastewater were each given responsibility for their respective systems.

Department leads for water and wastewater now independently manage their respective systems. This includes full ownership over their separate budgets to deliver a balanced CIP within their individual revenue limits.

For the first time, all 500+ water and wastewater projects received a numeric priority score. The prior approach — an executive committee making judgment calls about which projects to defer — was replaced by a fact-based ranking that could be shown, defended, and iterated on in real time. Invizion's multi-axis chart, contrasting fixed and flexible project spending against the revenue constraint line, became the team's most powerful executive communication tool.

With Invizion handling the analytical complexity, EBMUD extended its capital plan from a 5-year to a 10-year outlook — a first in the agency's 100-year history.

RESULTS/IMPACT

Results

EBMUD now operates with a single, unified view of its capital program — expense and revenue in the same platform, 500+ projects scored and ranked, and a planning horizon that stretches a full decade into the future.

Outcome

Detail

One platform for revenue and expense

For the first time, the team enters revenue constraints and sees capital spend relative to funding in real time — no more separate files, no more reconciliation meetings.

500+ projects scored and ranked

Every water and wastewater project received a numeric priority score — replacing executive judgment calls with a defensible, data-driven ranking.

Visuals that changed the conversation

Invizion's multi-axis chart contrasting committed and flexible spend against the revenue constraint line became the team's most powerful executive communication tool.

10-year planning horizon

EBMUD extended its capital planning outlook from 5 years to 10 — a first in the agency's 100-year history.

Distributed ownership

Department teams now own and update their CIP data directly. The central budget team shifted from hands-on data management to review and oversight.

LESSONS/NEXT STEPS

Lessons Learned

Timing: Implement Before Budget Season. The biggest efficiency gain comes when Invizion is fully configured before data collection begins. EBMUD went live mid-cycle, which meant some data had already been gathered in a format that didn't align with the new process — a small but avoidable friction point. If you're committing to the solution, get it approved and ready before budget development starts.

Alignment: Get Leadership Across the Chain. Support from the GM or CEO matters — but the teams who actually submit and score projects need to hear the mandate from their own direct leadership. Where that alignment existed, Invizion adoption was smooth and self-directed. Building alignment across the full executive chain before go-live removes the biggest adoption barrier.

LESSONS/NEXT STEPS

Next Steps

EBMUD is loading its current adopted CIP into Invizion and plans to have both water and wastewater department contacts take greater ownership of their own updates during the next budget development cycle. The central budget team will shift further toward review and oversight – with Invizion handling the analytical complexity that previously required hands-on central involvement.

“Before Invizion, the expense side and the revenue side lived in completely different files. We’d adjust debt levels and revenue assumptions back and forth until something worked. With Invizion, we entered the revenue constraints and immediately could see capital expense relative to funding – in the same place.”

NATHAN HOOD, CAPITAL BUDGET ADMINISTRATOR, EAST BAY MUNICIPAL UTILITY DISTRICT

About Invizion

Invizion is a strategic advisory and technology firm that helps federal agencies and large organizations achieve clarity in complex, data-intensive environments. We combine advanced analytics, program management expertise, and purpose-built platforms to help clients make faster, better-informed decisions.

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