INVIZION
Unified Data. Actionable Insights.

CASE STUDY

From Spreadsheet Silos to Financial Clarity

Laguna Beach County Water District, formed in 1925, serves an 8.5-square-mile coastal community in Orange County — a complex system of roughly 135 miles of pipeline, 8,500 connections, 21 reservoirs, 12 pump stations, and 15 pressure zones. In recent years its capital program has grown sharply, from about $3M a year before FY24 to a sustained $10–12M spanning every asset class.

56
CAPITAL PROJECTS
Managed in one platform

$10–12M
ANNUAL CIP INVESTMENT
Up from ~$3M before FY24

$15.5M
WATER REVENUE BOND
Planned for FY27

CLIENT **Laguna Beach County Water District**

CHALLENGE

Before Invizion, the capital program lived in disconnected spreadsheets: a master list in engineering, separate expenditure trackers in finance, and a bond-scenario model — none of them interlinked.

Heather Rhee arrived as Manager of Engineering mid-budget-cycle, from Long Beach where she had used Invizion, facing rate and cost pressure, a PAYGO balance to hold under threshold, and another bond to plan — all riding on the timing of capital projects. Across so many non-interlinked datasets, it was far too easy to miss something.

APPROACH

One hub for the capital program

Drawing on her experience with Invizion at Long Beach, Heather brought it to Laguna Beach to pull the scattered spreadsheets into a single hub for the capital program. Invizion is now the District's single source of truth: finance feeds in actual expenditures, project managers report status and projected spend, and Heather brings it all together in one platform.

From that one dataset she does two things — she tells the CIP story to every audience in its own language (actuals and forecasts for finance, high-level visuals and KPIs for the board, status updates for her engineering team), and she runs the program with real transparency and accountability, with clear visibility into cost and schedule performance for a publicly funded program.

RESULTS/IMPACT

What changed with Invizion

- **One source of truth.** Engineering's master list of capital projects, finance's expenditure trackers, and bond tracking tools now live in one database — actuals, status, and projected spend together, not in disconnected files.
- **Speaks every stakeholder's language.** Using Invizion dashboards, Heather tailors the story: actuals and forecasts for finance, visuals and KPIs for the board, status for engineering — refreshed monthly or on demand.
- **Transparency and accountability.** Clear visibility into cost and schedule performance shows which projects are slipping and why, and where to rebalance an overloaded project manager's workload.
- **Cash-flow and bond strategy.** A single, current view of planned spend helps hold the PAYGO balance under threshold and time projects around bond issuance — with one bond outstanding and another planned.
- **A longer planning horizon.** Centralized data lets the District extend past the usual 1–5-year view toward the 10-year-plus outlook it needs to weigh and prioritize new supplies like the Doheny Ocean Desalination Project, in which LBCWD is a partner.

LESSONS/NEXT STEPS

Advice from the field

Tackle change management first

Heather's biggest lesson from two Invizion deployments: if you're moving off an existing platform, the hardest part is change management. Laguna's advantage was starting from spreadsheets, with little to unwind.

Plan your data needs up front

Choose a flexible platform like Invizion that allows you to structure and restructure your data needs. Heather spent time fine-tuning her setup, showing how establishing clear data requirements early can accelerate results.

LESSONS/NEXT STEPS

What's next: widening the platform

LBCWD plans to widen Invizion's use across more of the team, integrate the 2026 Water Master Plan into the CIP database for long-range planning, and continue partnering with finance on bond financing, budget development, and expenditure forecasting.

> *"Now it's all in one place, and I can take that data and speak everyone's language, whether it's finance, the board, or my own team."*
>
> HEATHER RHEE, MANAGER OF ENGINEERING, LAGUNA BEACH COUNTY WATER 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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