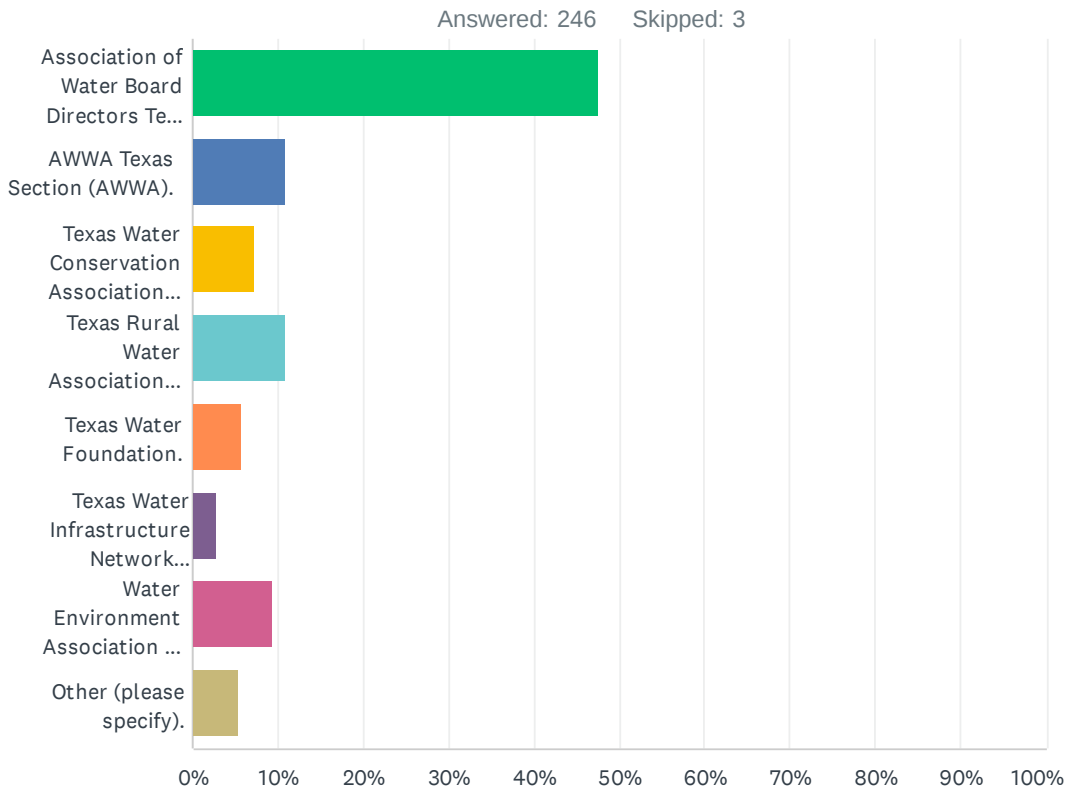




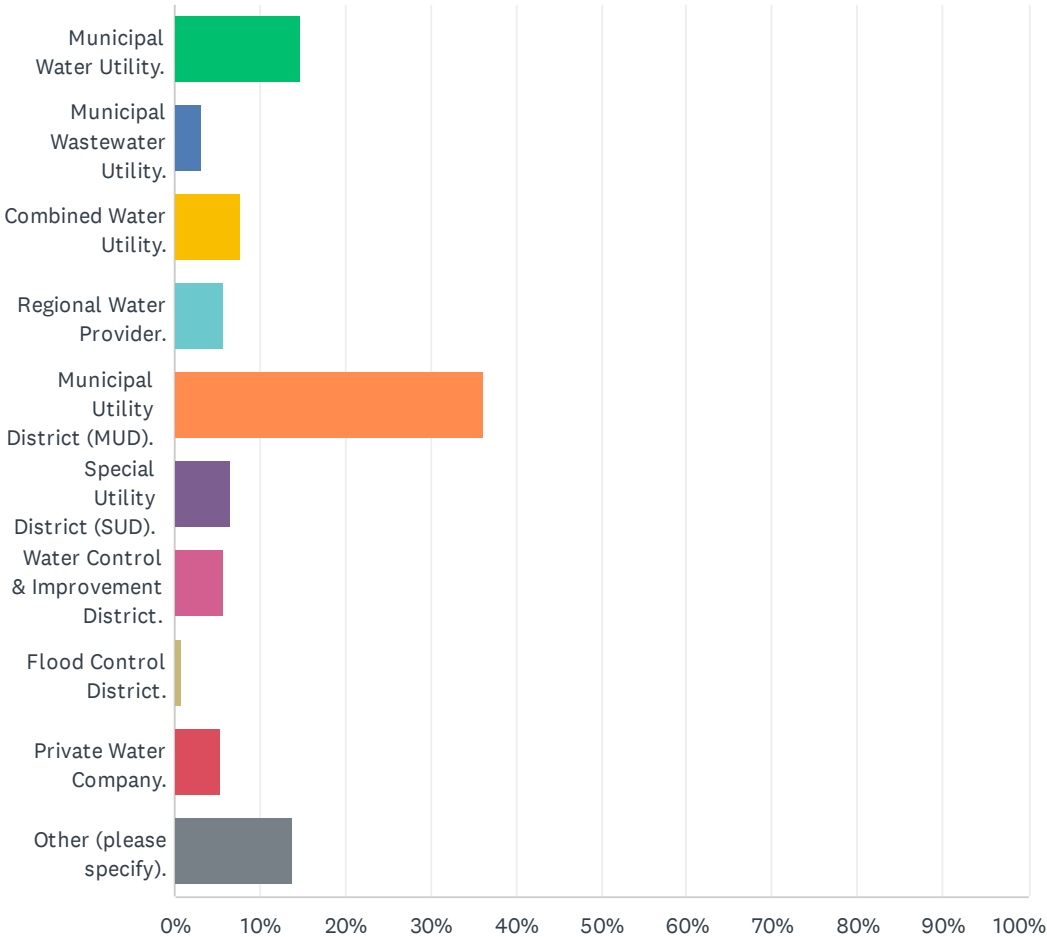
Q1 Please indicate from which organization(s) you received this survey.



ANSWER CHOICES	RESPONSES	
Association of Water Board Directors Texas (AWBD).	47.56%	117
AWWA Texas Section (AWWA).	10.98%	27
Texas Water Conservation Association (TWCA).	7.32%	18
Texas Rural Water Association (TRWA).	10.98%	27
Texas Water Foundation.	5.69%	14
Texas Water Infrastructure Network (TXWIN).	2.85%	7
Water Environment Association of Texas (WEAT).	9.35%	23
Other (please specify).	5.28%	13
TOTAL		246

Q2 How would you classify your utility?

Answered: 245 Skipped: 4

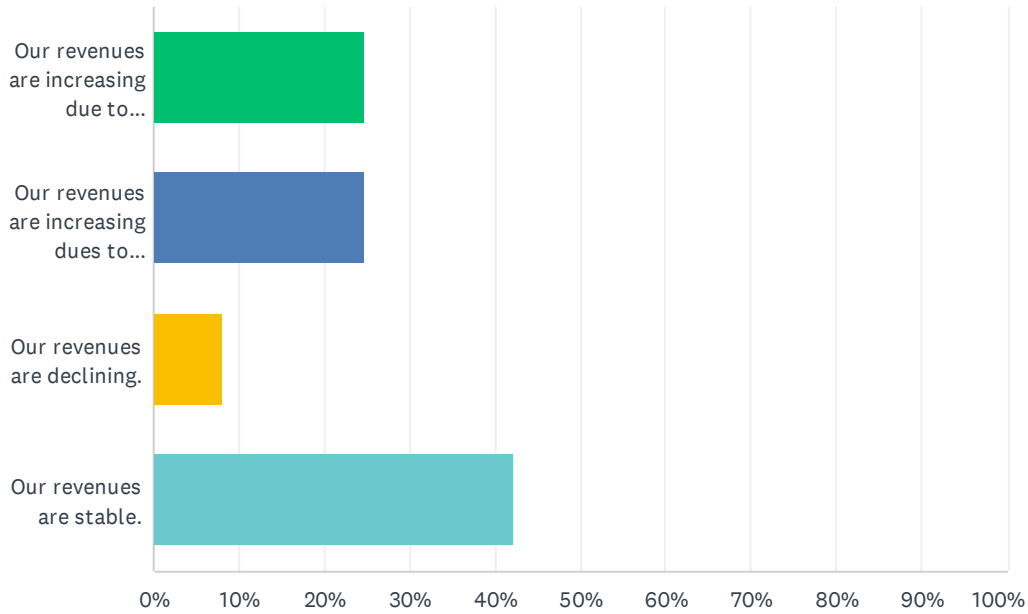


Texas Water Capital Needs Survey (2024)

ANSWER CHOICES	RESPONSES	
Municipal Water Utility.	14.69%	36
Municipal Wastewater Utility.	3.27%	8
Combined Water Utility.	7.76%	19
Regional Water Provider.	5.71%	14
Municipal Utility District (MUD).	36.33%	89
Special Utility District (SUD).	6.53%	16
Water Control & Improvement District.	5.71%	14
Flood Control District.	0.82%	2
Private Water Company.	5.31%	13
Other (please specify).	13.88%	34
TOTAL		245

Q3 How would you describe your utility’s current and projected revenues?

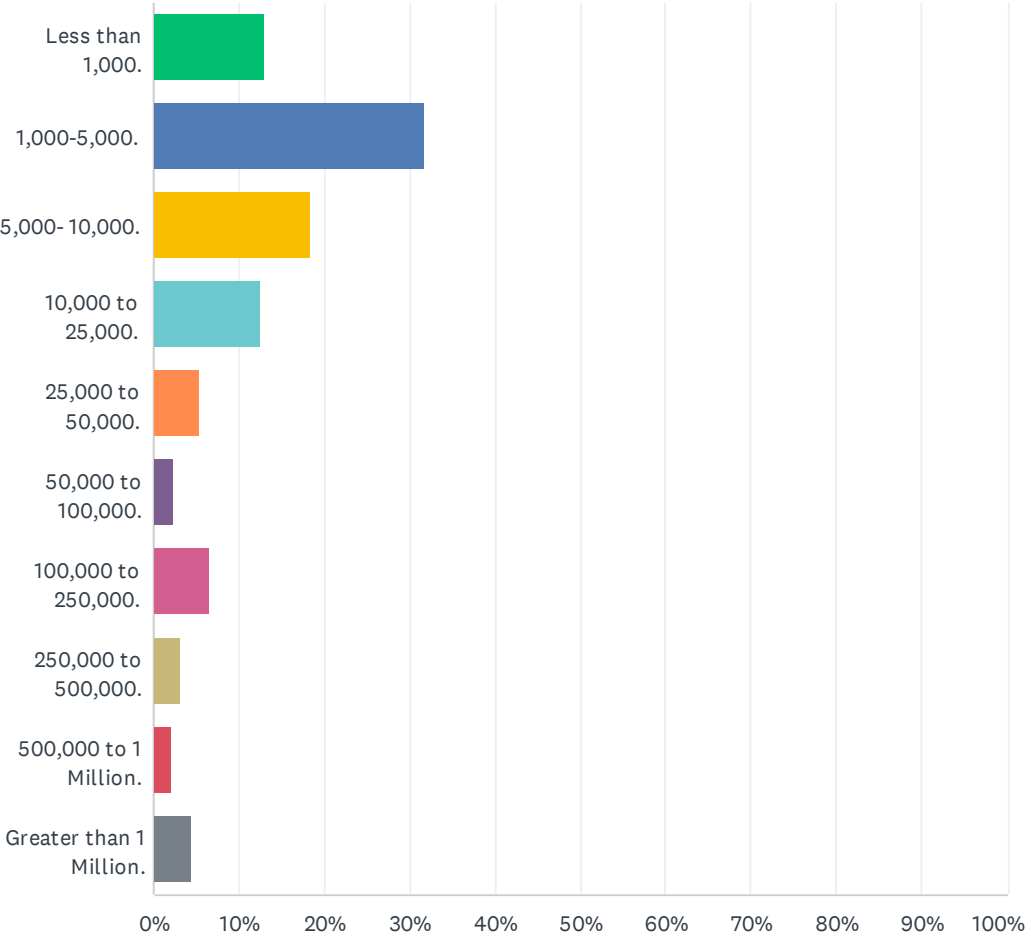
Answered: 246 Skipped: 3



ANSWER CHOICES	RESPONSES	
Our revenues are increasing due to increased water sales.	24.80%	61
Our revenues are increasing dues to increased water rates or inflation.	24.80%	61
Our revenues are declining.	8.13%	20
Our revenues are stable.	42.28%	104
TOTAL		246

Q4 What is the approximate population served by your utility?

Answered: 245 Skipped: 4

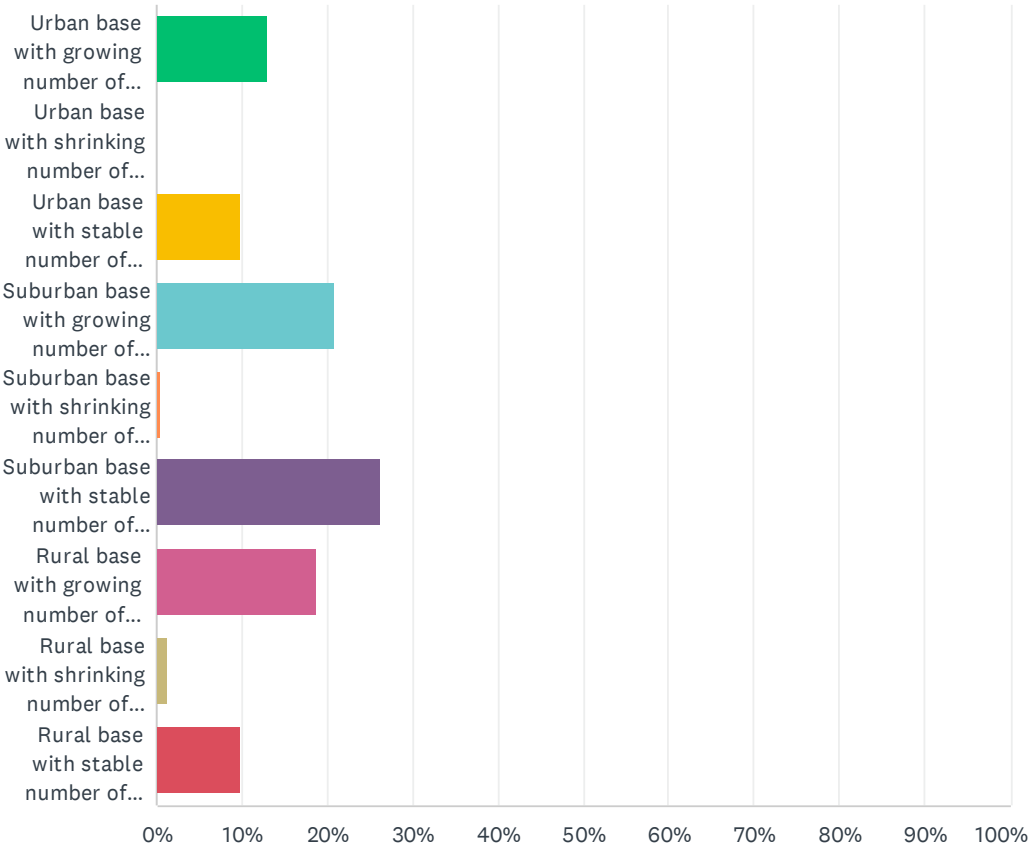


Texas Water Capital Needs Survey (2024)

ANSWER CHOICES	RESPONSES	
Less than 1,000.	13.06%	32
1,000-5,000.	31.84%	78
5,000- 10,000.	18.37%	45
10,000 to 25,000.	12.65%	31
25,000 to 50,000.	5.31%	13
50,000 to 100,000.	2.45%	6
100,000 to 250,000.	6.53%	16
250,000 to 500,000.	3.27%	8
500,000 to 1 Million.	2.04%	5
Greater than 1 Million.	4.49%	11
TOTAL		245

Q5 What is the best description of your utilities customer base?

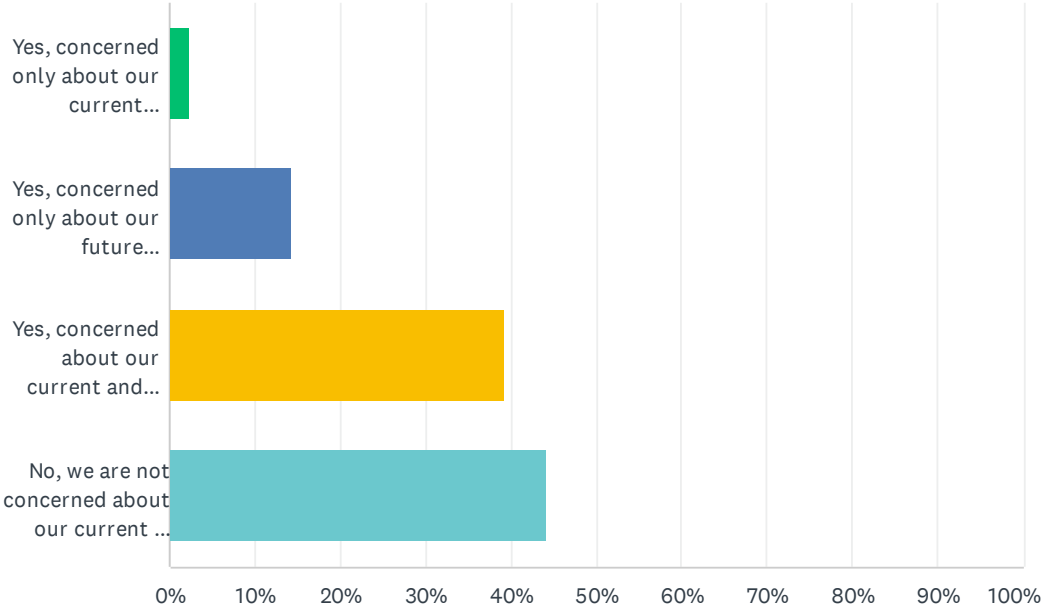
Answered: 245 Skipped: 4



ANSWER CHOICES	RESPONSES	
Urban base with growing number of connections.	13.06%	32
Urban base with shrinking number of connections.	0.00%	0
Urban base with stable number of connections.	9.80%	24
Suburban base with growing number of connections.	20.82%	51
Suburban base with shrinking number of connections.	0.41%	1
Suburban base with stable number of connections.	26.12%	64
Rural base with growing number of connections.	18.78%	46
Rural base with shrinking number of connections.	1.22%	3
Rural base with stable number of connections.	9.80%	24
TOTAL		245

Q6 Are you concerned about the ability to maintain your current or future workforce?

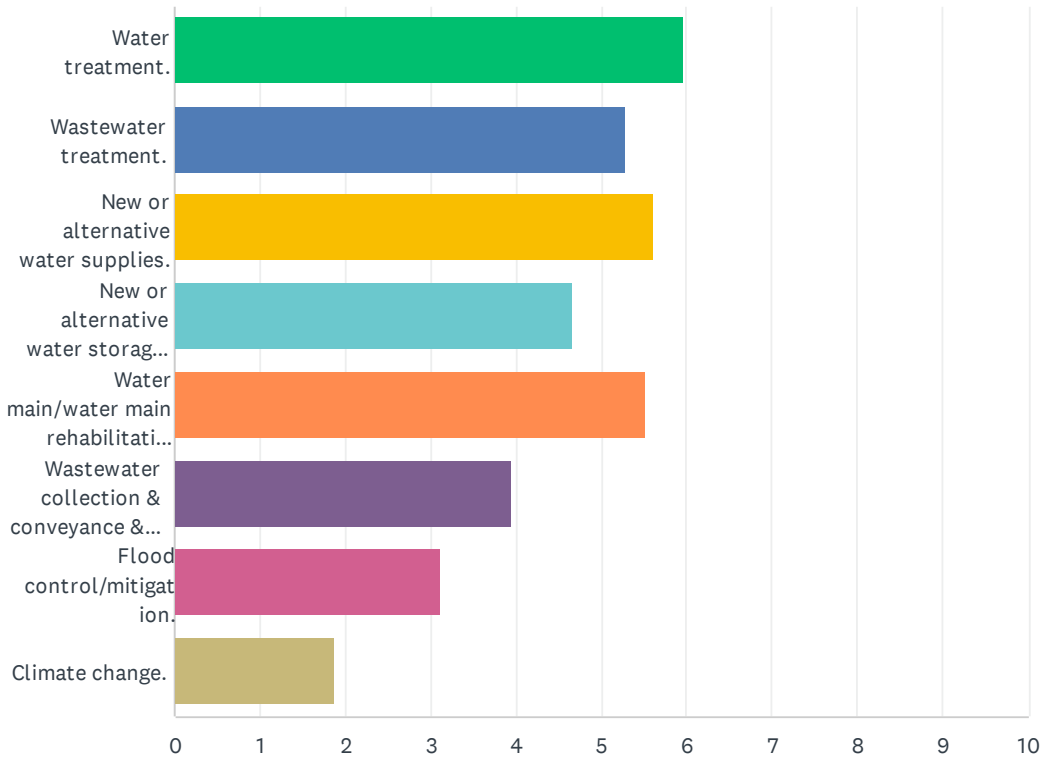
Answered: 245 Skipped: 4



ANSWER CHOICES	RESPONSES	
Yes, concerned only about our current workforce.	2.45%	6
Yes, concerned only about our future workforce.	14.29%	35
Yes, concerned about our current and future workforce.	39.18%	96
No, we are not concerned about our current or future workforce.	44.08%	108
TOTAL		245

Q7 Please rank your utilities current infrastructure needs by priority. (1 to 8, with 1 representing your highest Priority)

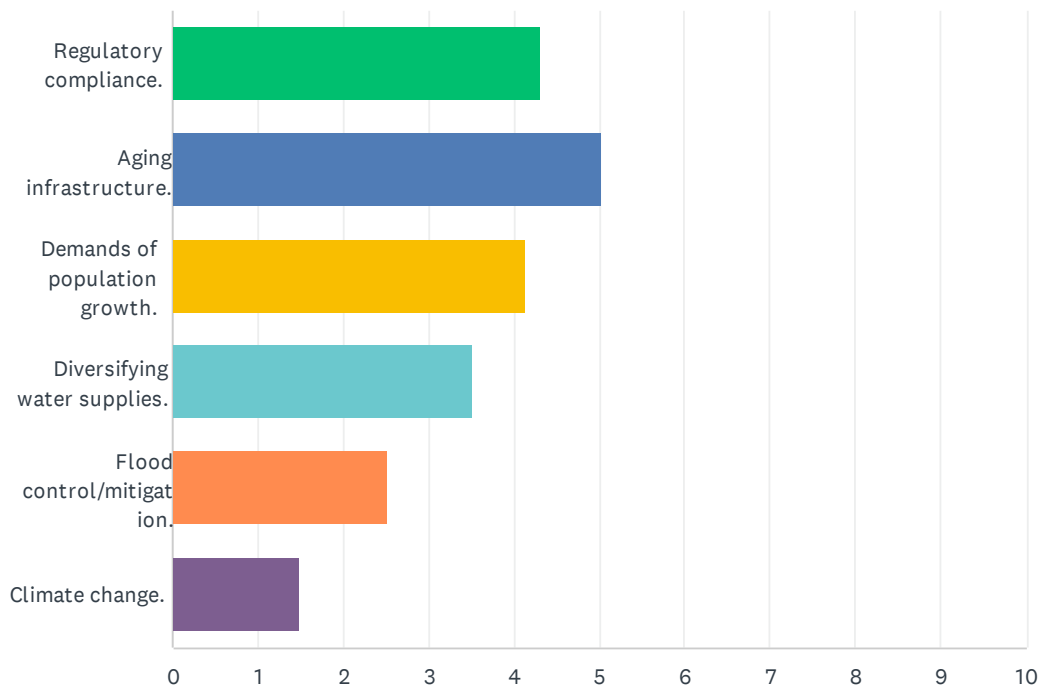
Answered: 246 Skipped: 3



	1	2	3	4	5	6	7	8	TOTAL	SCORE
Water treatment.	26.83% 66	19.92% 49	17.89% 44	14.23% 35	8.54% 21	7.32% 18	3.66% 9	1.63% 4	246	5.98
Wastewater treatment.	15.04% 37	26.02% 64	11.38% 28	9.76% 24	16.67% 41	7.32% 18	6.91% 17	6.91% 17	246	5.29
New or alternative water supplies.	23.17% 57	15.85% 39	16.67% 41	16.67% 41	8.54% 21	9.35% 23	8.54% 21	1.22% 3	246	5.60
New or alternative water storage facilities.	2.85% 7	13.82% 34	18.70% 46	21.54% 53	13.82% 34	16.67% 41	10.57% 26	2.03% 5	246	4.68
Water main/water main rehabilitation, repair, or replacement.	23.58% 58	10.98% 27	15.04% 37	16.26% 40	20.73% 51	7.32% 18	4.47% 11	1.63% 4	246	5.52
Wastewater collection & conveyance & distribution.	2.44% 6	8.94% 22	10.57% 26	13.41% 33	14.23% 35	32.52% 80	10.16% 25	7.72% 19	246	3.95
Flood control/mitigation.	4.07% 10	2.85% 7	6.91% 17	5.28% 13	13.01% 32	12.60% 31	45.12% 111	10.16% 25	246	3.11
Climate change.	2.03% 5	1.63% 4	2.85% 7	2.85% 7	4.47% 11	6.91% 17	10.57% 26	68.70% 169	246	1.87

Q8 Please rank the greatest drivers for your future infrastructure and capital projects? (1 to 6, with 1 representing your highest Priority)

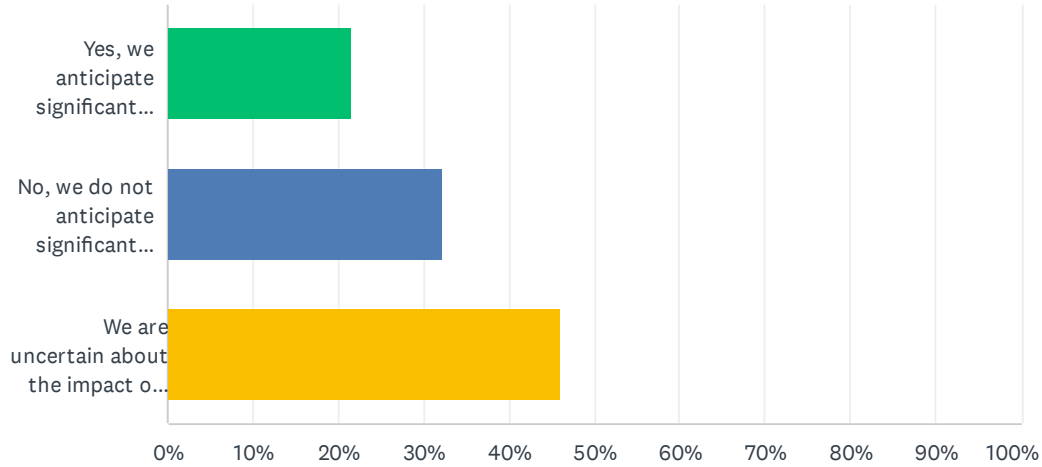
Answered: 232 Skipped: 17



	1	2	3	4	5	6	TOTAL	SCORE
Regulatory compliance.	12.07% 28	38.36% 89	29.31% 68	9.48% 22	9.05% 21	1.72% 4	232	4.30
Aging infrastructure.	55.17% 128	15.52% 36	13.79% 32	10.78% 25	2.16% 5	2.59% 6	232	5.03
Demands of population growth.	21.12% 49	20.26% 47	27.59% 64	18.10% 42	8.19% 19	4.74% 11	232	4.14
Diversifying water supplies.	7.33% 17	15.52% 36	17.67% 41	43.97% 102	12.50% 29	3.02% 7	232	3.52
Flood control/mitigation.	2.59% 6	8.19% 19	9.05% 21	11.64% 27	54.74% 127	13.79% 32	232	2.51
Climate change.	1.72% 4	2.16% 5	2.59% 6	6.03% 14	13.36% 31	74.14% 172	232	1.50

Q9 Is your utility presently concerned about compliance with new PFAS regulations from the U.S. EPA?

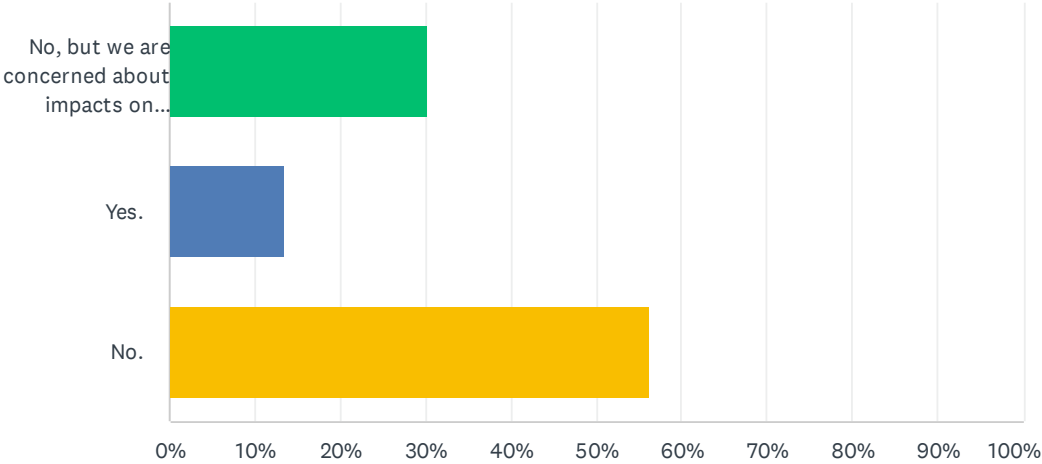
Answered: 245 Skipped: 4



ANSWER CHOICES	RESPONSES	
Yes, we anticipate significant costs associated with PFAS treatment and mitigation.	21.63%	53
No, we do not anticipate significant costs associated with PFAS treatment and mitigation.	32.24%	79
We are uncertain about the impact on our utility.	46.12%	113
TOTAL		245

Q10 Within the last five years, has a proposed economic development project in your area been turned away, hindered, or altogether halted due to your utility's inability to meet its water supply needs?

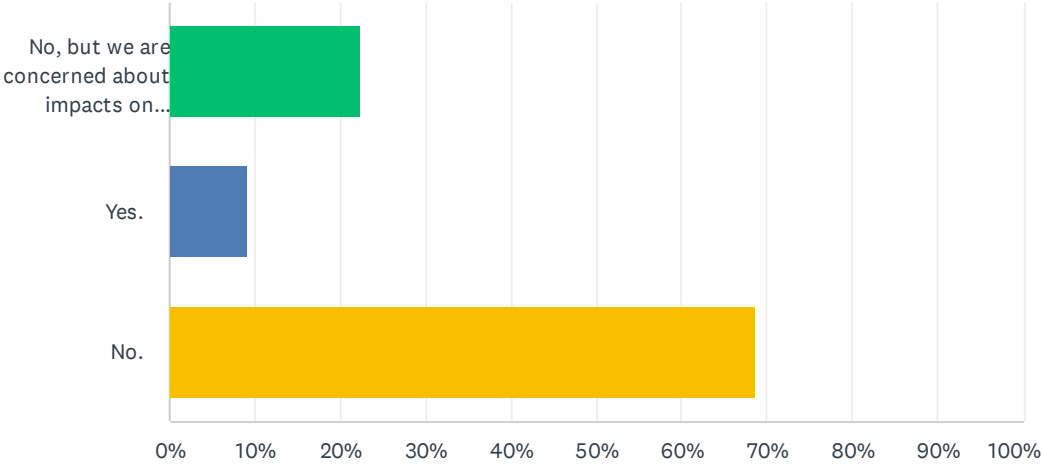
Answered: 245 Skipped: 4



ANSWER CHOICES	RESPONSES	
No, but we are concerned about impacts on future economic development projects.	30.20%	74
Yes.	13.47%	33
No.	56.33%	138
TOTAL		245

Q11 Within the last five years, has a proposed economic development project in your area been turned away, hindered, or altogether halted due to your utility's inability to meet its wastewater treatment capacity needs?

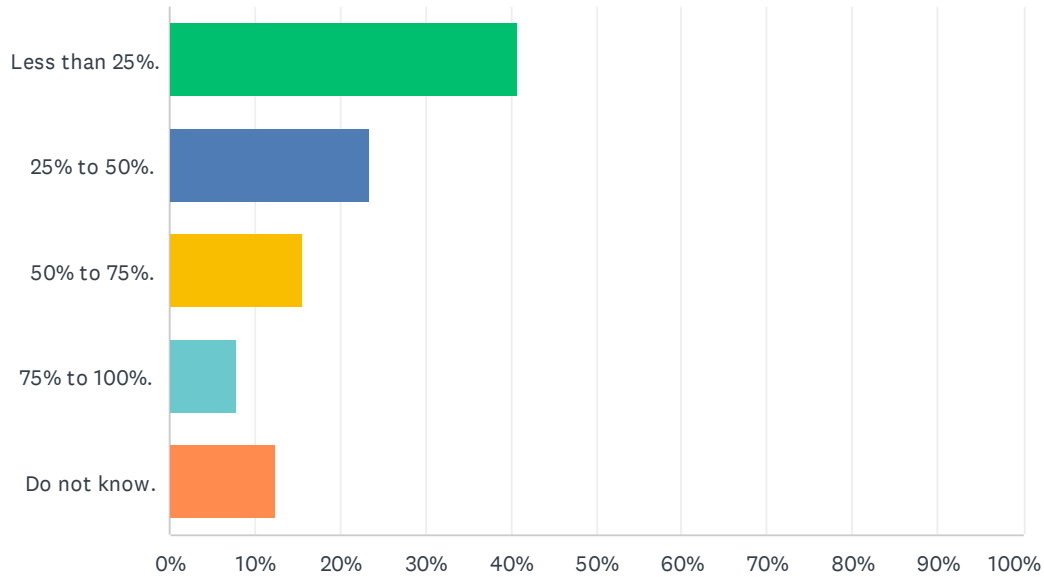
Answered: 242 Skipped: 7



ANSWER CHOICES	RESPONSES	
No, but we are concerned about impacts on future economic development projects.	22.31%	54
Yes.	9.09%	22
No.	68.60%	166
TOTAL		242

Q12 What percentage of the water mains in your system require replacement or rehabilitation?

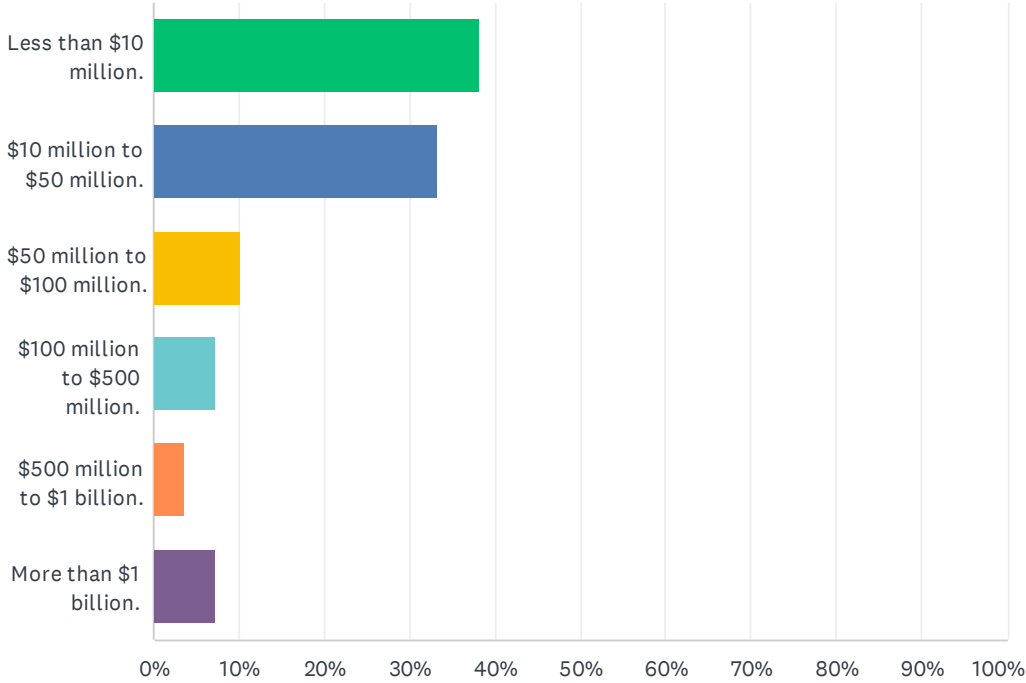
Answered: 243 Skipped: 6



ANSWER CHOICES	RESPONSES	
Less than 25%.	40.74%	99
25% to 50%.	23.46%	57
50% to 75%.	15.64%	38
75% to 100%.	7.82%	19
Do not know.	12.35%	30
TOTAL		243

Q13 What are your estimated capital construction funding needs over the next 10-year period?

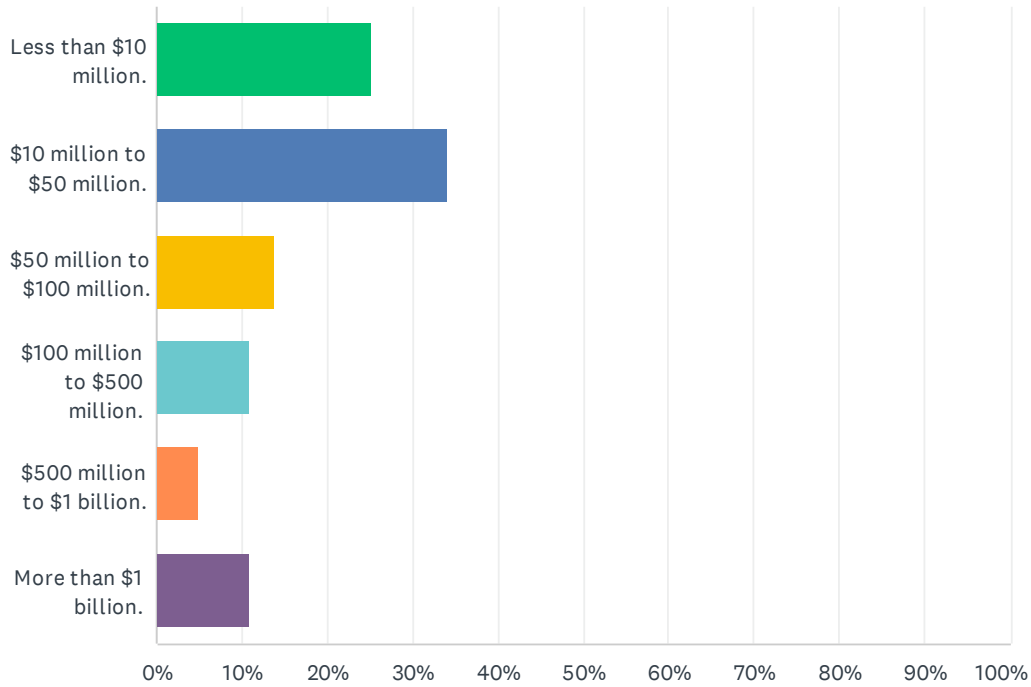
Answered: 246 Skipped: 3



ANSWER CHOICES	RESPONSES	
Less than \$10 million.	38.21%	94
\$10 million to \$50 million.	33.33%	82
\$50 million to \$100 million.	10.16%	25
\$100 million to \$500 million.	7.32%	18
\$500 million to \$1 billion.	3.66%	9
More than \$1 billion.	7.32%	18
TOTAL		246

Q14 What are your estimated capital construction funding needs over the next 20-year period?

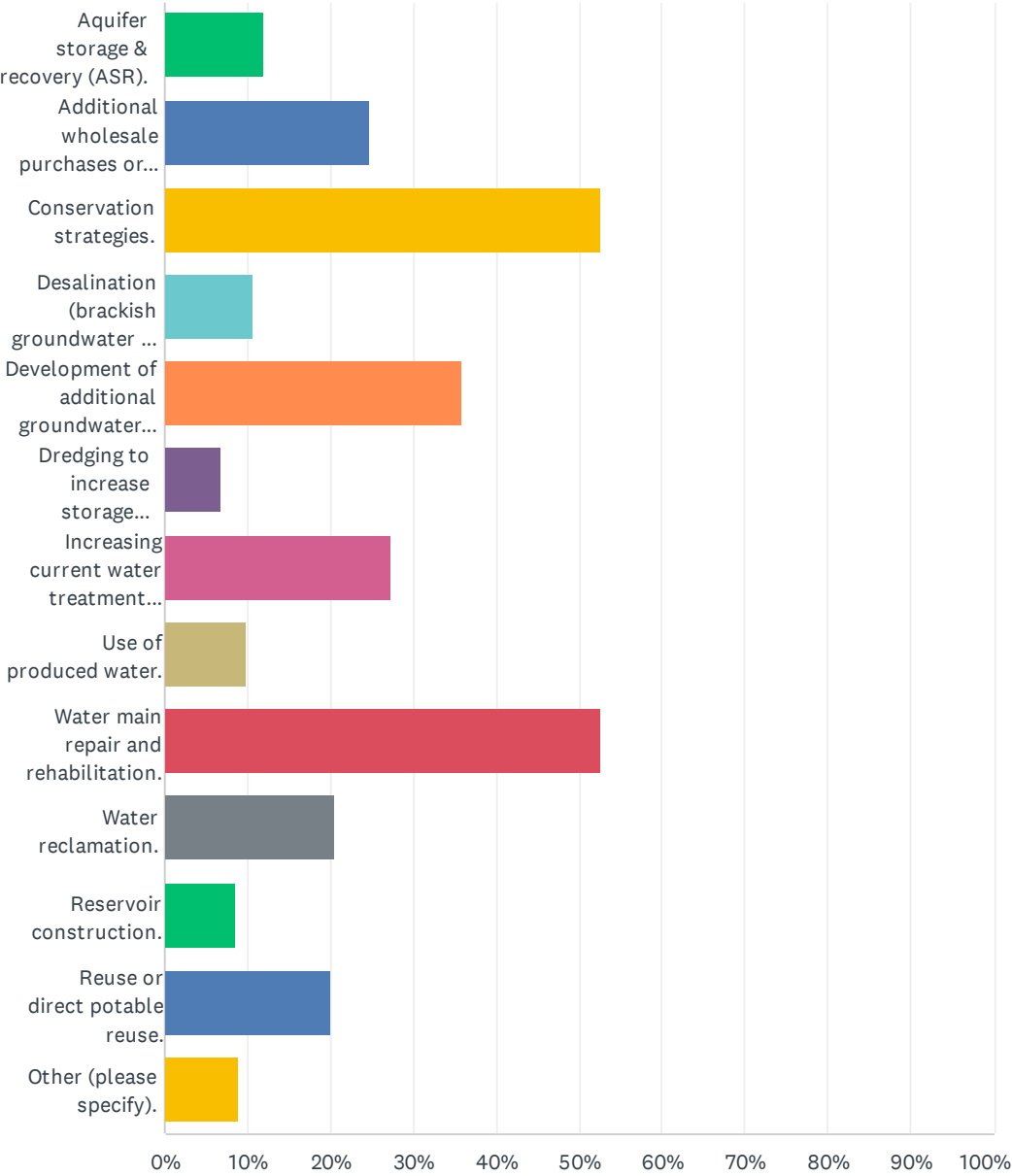
Answered: 246 Skipped: 3



ANSWER CHOICES	RESPONSES
Less than \$10 million.	25.20% 62
\$10 million to \$50 million.	34.15% 84
\$50 million to \$100 million.	13.82% 34
\$100 million to \$500 million.	10.98% 27
\$500 million to \$1 billion.	4.88% 12
More than \$1 billion.	10.98% 27
TOTAL	246

Q15 What new water supply strategies are you considering? (Please select all that apply)

Answered: 234 Skipped: 15

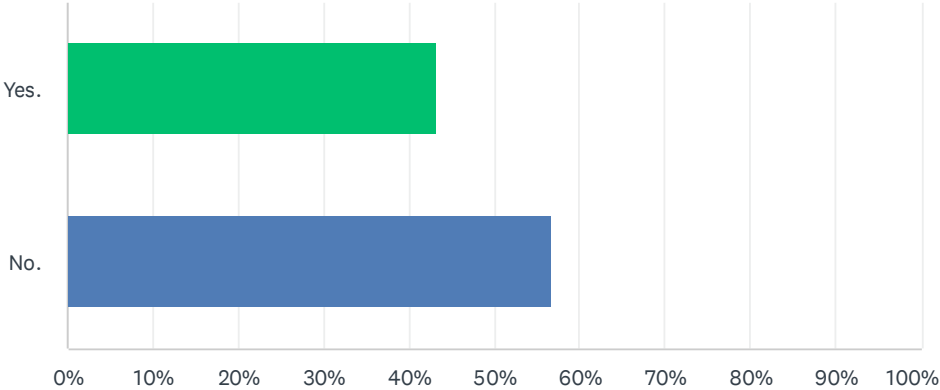


Texas Water Capital Needs Survey (2024)

ANSWER CHOICES	RESPONSES	
Aquifer storage & recovery (ASR).	11.97%	28
Additional wholesale purchases or inter-basin transfers.	24.79%	58
Conservation strategies.	52.56%	123
Desalination (brackish groundwater or seawater).	10.68%	25
Development of additional groundwater supplies or purchase of water rights.	35.90%	84
Dredging to increase storage capacity.	6.84%	16
Increasing current water treatment capacity.	27.35%	64
Use of produced water.	9.83%	23
Water main repair and rehabilitation.	52.56%	123
Water reclamation.	20.51%	48
Reservoir construction.	8.55%	20
Reuse or direct potable reuse.	20.09%	47
Other (please specify).	8.97%	21
Total Respondents: 234		

Q16 Do you presently have any new water supply projects in your regional water plan?

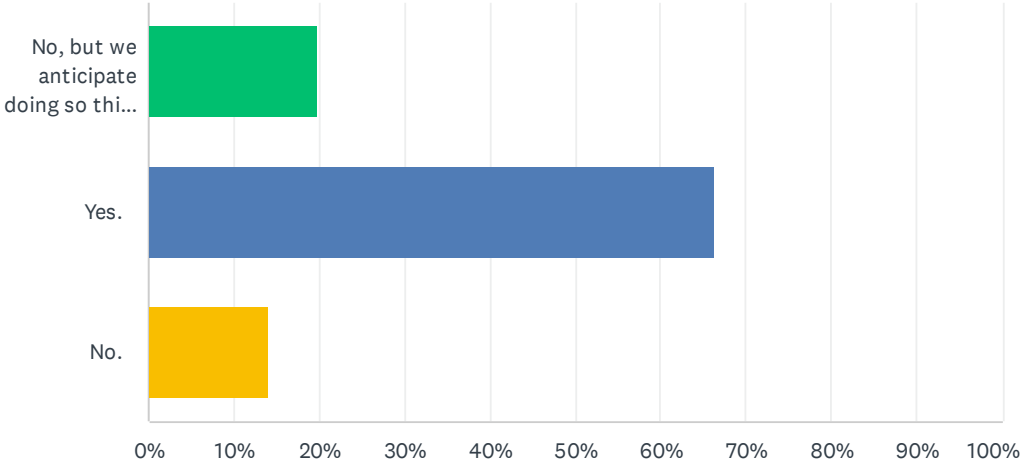
Answered: 242 Skipped: 7



ANSWER CHOICES	RESPONSES	
Yes.	43.39%	105
No.	56.61%	137
TOTAL		242

Q17 Have you allocated or committed funds for capital projects for FY 2024/2025?

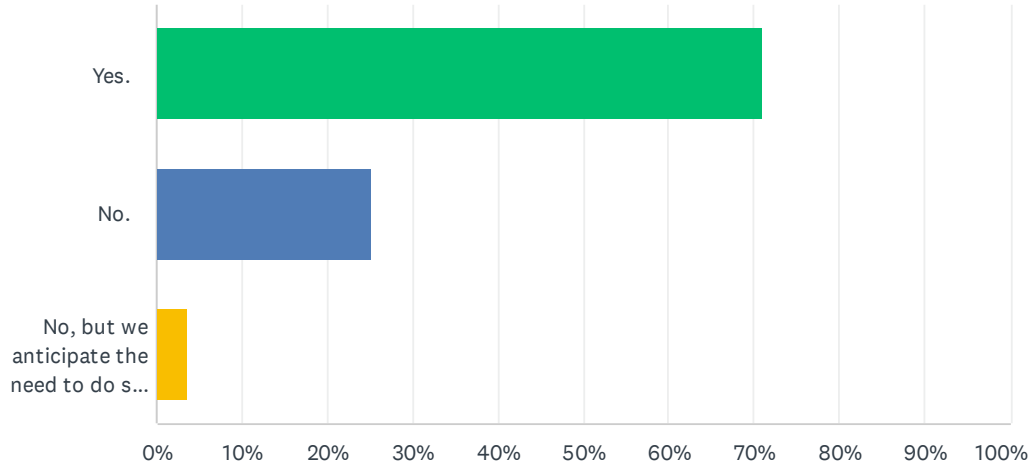
Answered: 243 Skipped: 6



ANSWER CHOICES	RESPONSES	
No, but we anticipate doing so this year.	19.75%	48
Yes.	66.26%	161
No.	13.99%	34
TOTAL		243

Q18 In the last two-years has your utility enacted conservation measures and/or drought contingency plans?

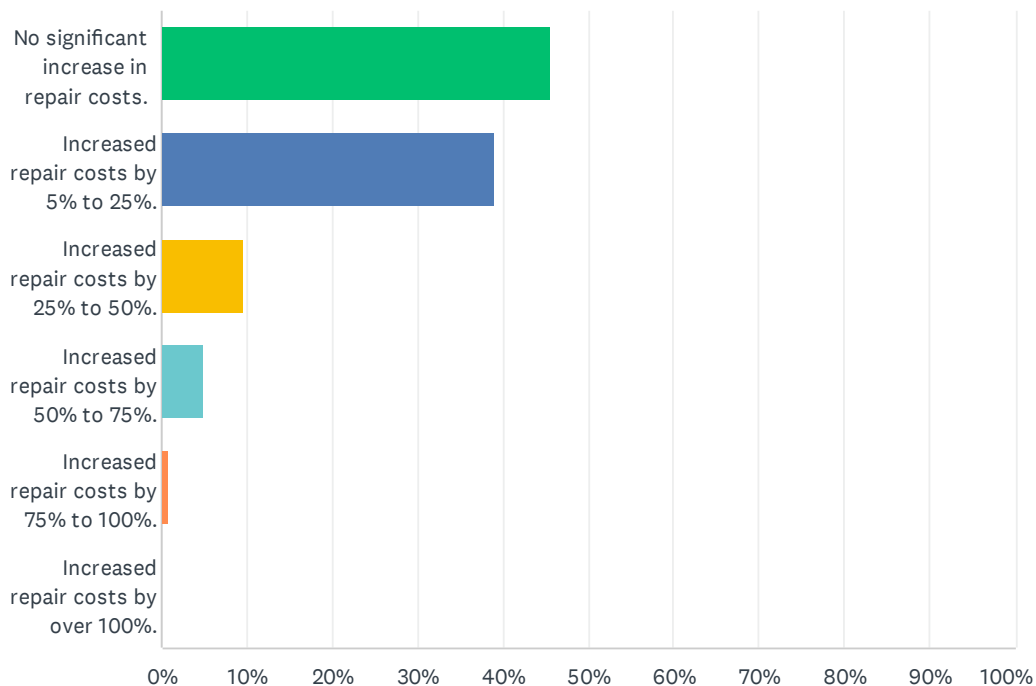
Answered: 242 Skipped: 7



ANSWER CHOICES	RESPONSES
Yes.	71.07% 172
No.	25.21% 61
No, but we anticipate the need to do so this year.	3.72% 9
TOTAL	242

Q19 How has the current drought impacted your infrastructure repair costs over the past two years?

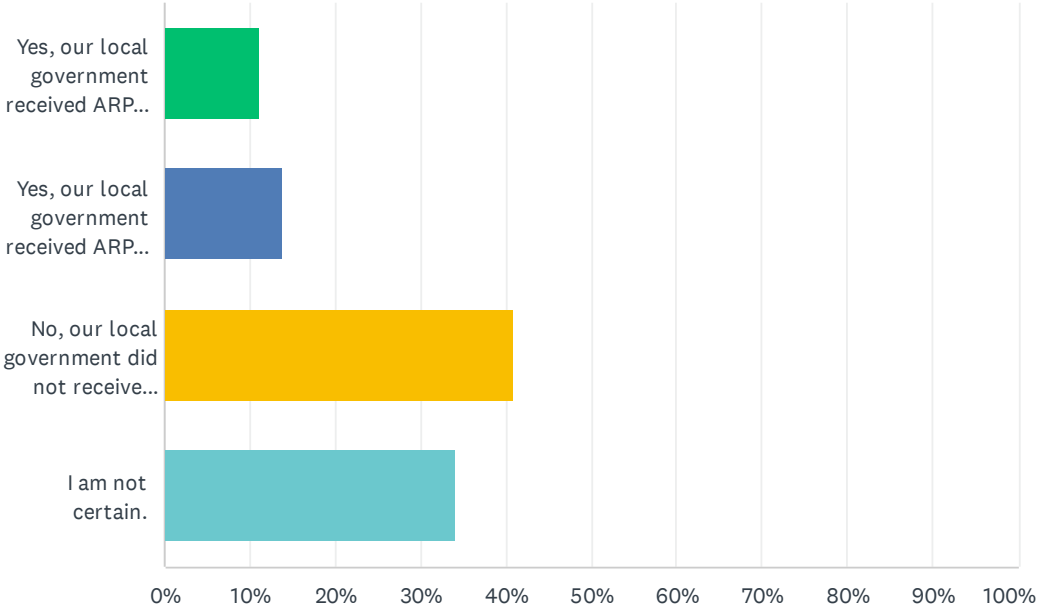
Answered: 241 Skipped: 8



ANSWER CHOICES	RESPONSES	
No significant increase in repair costs.	45.64%	110
Increased repair costs by 5% to 25%.	39.00%	94
Increased repair costs by 25% to 50%.	9.54%	23
Increased repair costs by 50% to 75%.	4.98%	12
Increased repair costs by 75% to 100%.	0.83%	2
Increased repair costs by over 100%.	0.00%	0
TOTAL		241

Q20 Did your local government receive any American Rescue Plan Act (ARPA) funding? If so, were any ARPA funds directed to water infrastructure projects?

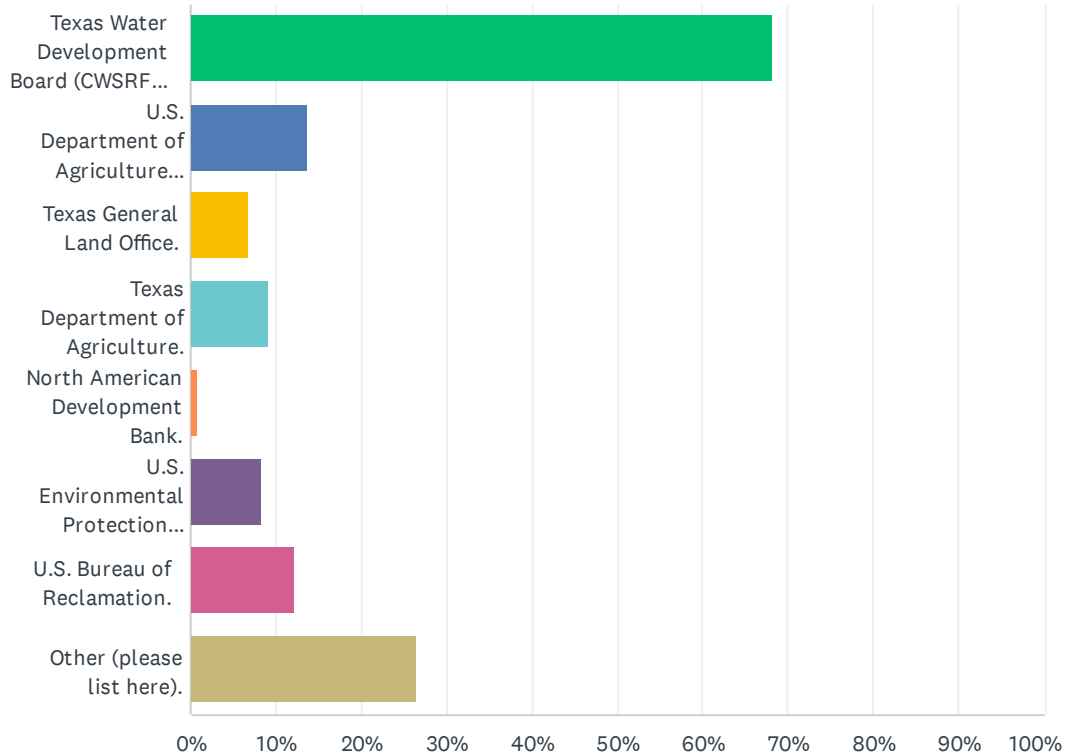
Answered: 244 Skipped: 5



ANSWER CHOICES	RESPONSES	
Yes, our local government received ARPA funds, and some funds were allocated for water infrastructure.	11.07%	27
Yes, our local government received ARPA funds, but funds were not allocated for water infrastructure.	13.93%	34
No, our local government did not receive ARPA funds.	40.98%	100
I am not certain.	34.02%	83
TOTAL		244

Q21 Has your utility applied for funding from any of the following state or federal agencies in the last year, or do you plan to do so in the coming year? (Please select all that apply.)

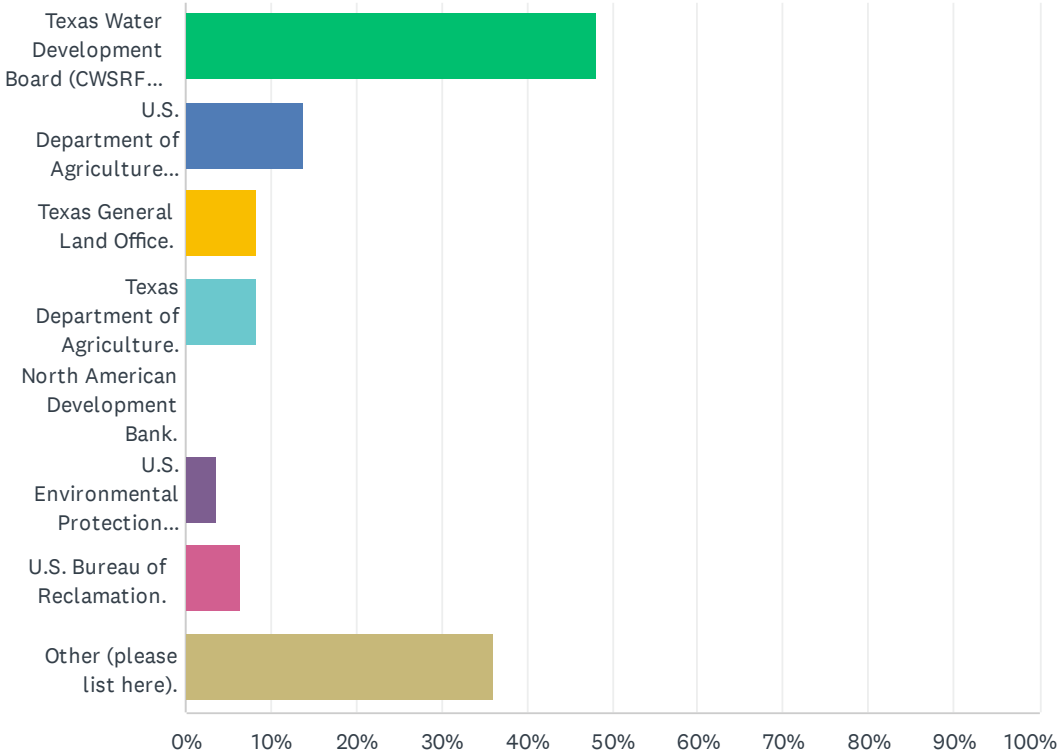
Answered: 132 Skipped: 117



ANSWER CHOICES	RESPONSES	
Texas Water Development Board (CWSRF, DWSRF, DFUND, EDAP, FIF, LSLR, Participation, SWIFT, etc.).	68.18%	90
U.S. Department of Agriculture (including the Rural Development or Natural Resources Conservation Service).	13.64%	18
Texas General Land Office.	6.82%	9
Texas Department of Agriculture.	9.09%	12
North American Development Bank.	0.76%	1
U.S. Environmental Protection Agency (WIFIA, Emerging Contaminants, other).	8.33%	11
U.S. Bureau of Reclamation.	12.12%	16
Other (please list here).	26.52%	35
Total Respondents: 132		

Q22 Has your utility received funding from any of the following state or federal agencies in the past 5-year period? (Please select all that apply.)

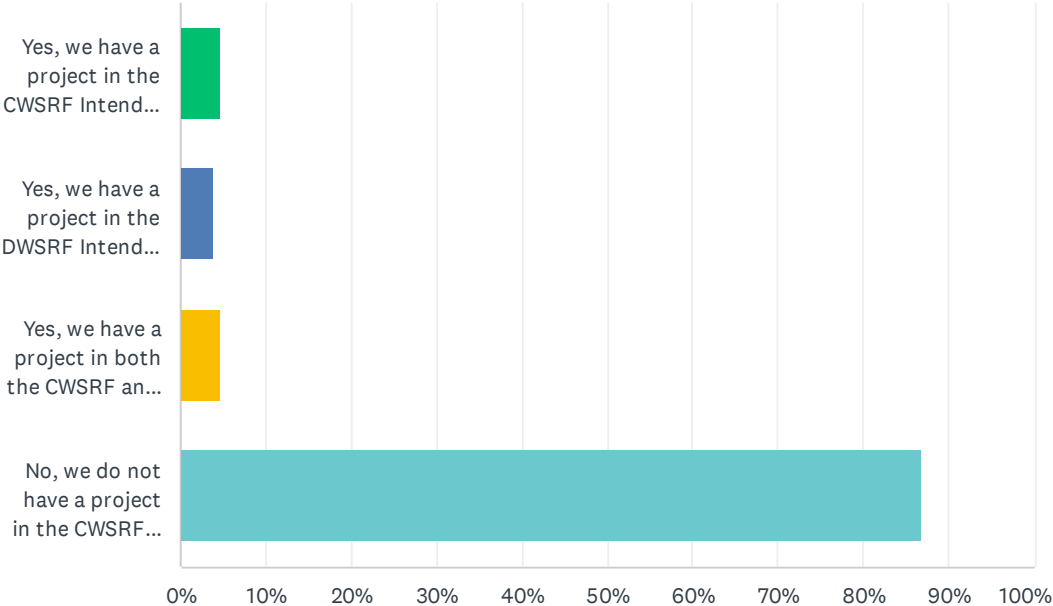
Answered: 108 Skipped: 141



ANSWER CHOICES	RESPONSES	
Texas Water Development Board (CWSRF, DWSRF, DFUND, EDAP, FIF, LSLR, Participation, SWIFT, etc.).	48.15%	52
U.S. Department of Agriculture (including the Rural Development or Natural Resources Conservation Service).	13.89%	15
Texas General Land Office.	8.33%	9
Texas Department of Agriculture.	8.33%	9
North American Development Bank.	0.00%	0
U.S. Environmental Protection Agency (WIFIA, Emerging Contaminants, other).	3.70%	4
U.S. Bureau of Reclamation.	6.48%	7
Other (please list here).	36.11%	39
Total Respondents: 108		

Q23 Does your utility presently have project(s) currently in the FY 2024 Clean Water State Revolving Fund (CWSRF) Intended Use Plan or the Drinking Water State Revolving Fund (DWSRF) Intended Use Plan?

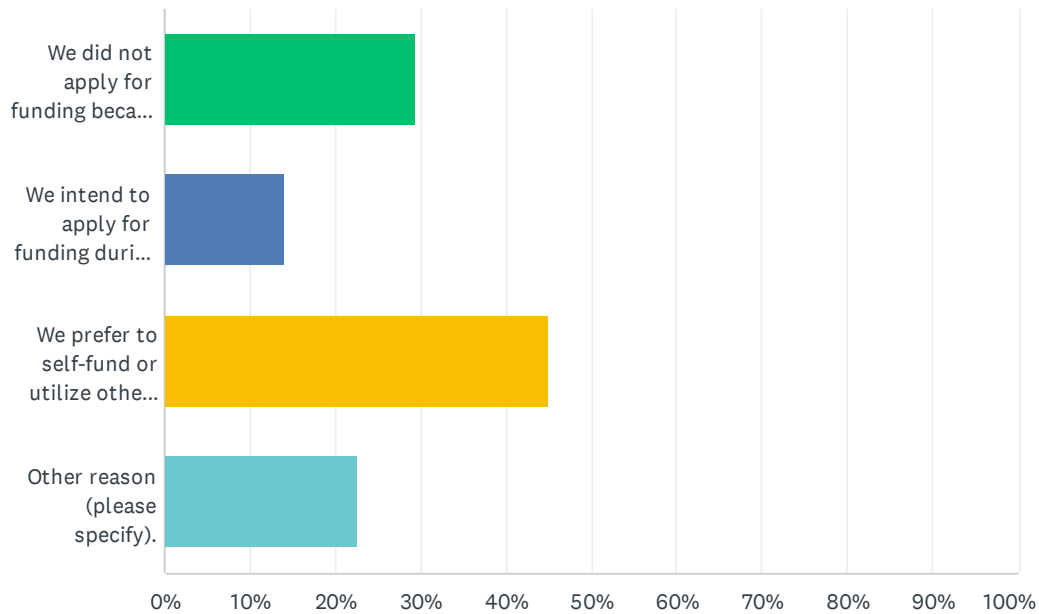
Answered: 234 Skipped: 15



ANSWER CHOICES	RESPONSES	
Yes, we have a project in the CWSRF Intended Use Plan.	4.70%	11
Yes, we have a project in the DWSRF Intended Use Plan.	3.85%	9
Yes, we have a project in both the CWSRF and the DWSRF Intended Use Plans.	4.70%	11
No, we do not have a project in the CWSRF or in the DWSRF Intended Use Plans.	86.75%	203
TOTAL		234

Q24 If you answered “No” to question 23, please select all that apply.

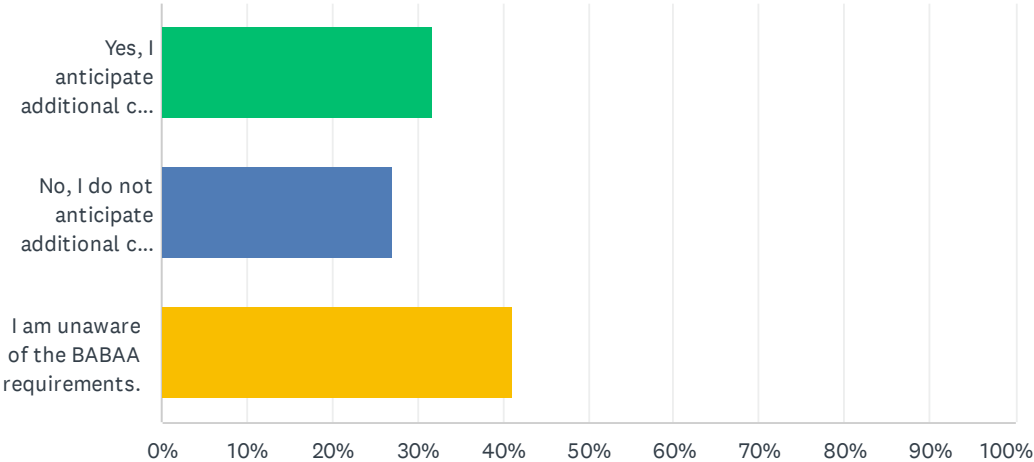
Answered: 200 Skipped: 49



ANSWER CHOICES	RESPONSES	
We did not apply for funding because the application process and administrative requirements are too cumbersome.	29.50%	59
We intend to apply for funding during the FY 2025 cycle.	14.00%	28
We prefer to self-fund or utilize other funding programs.	45.00%	90
Other reason (please specify).	22.50%	45
Total Respondents: 200		

Q25 If you answered “Yes” to question 23, are you concerned about compliance with the recently expanded Build America Buy America Act (BABAA) requirements applicable to some state-administered EPA SRF funds?

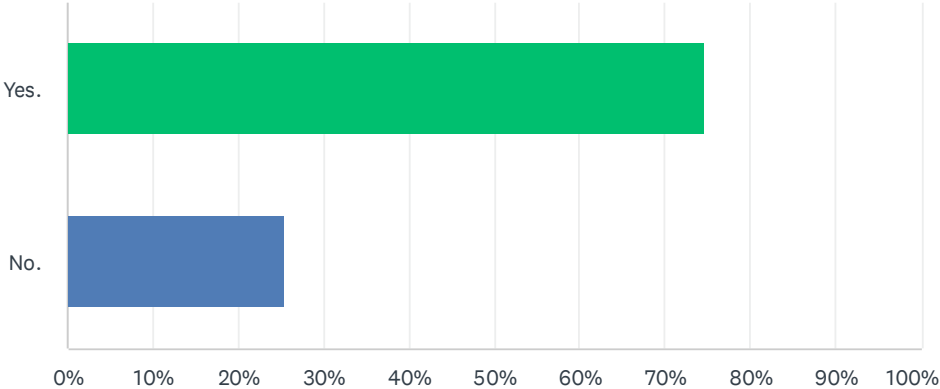
Answered: 107 Skipped: 142



ANSWER CHOICES	RESPONSES	
Yes, I anticipate additional cost and potential delays as a result of BABAA.	31.78%	34
No, I do not anticipate additional cost and potential delays as a result of BABAA.	27.10%	29
I am unaware of the BABAA requirements.	41.12%	44
TOTAL		107

Q26 Are you interested in pursuing funding from the new Texas Water Fund, or the new Texas Water Supply Funds passed by voters in Proposition 6 once these programs become available?

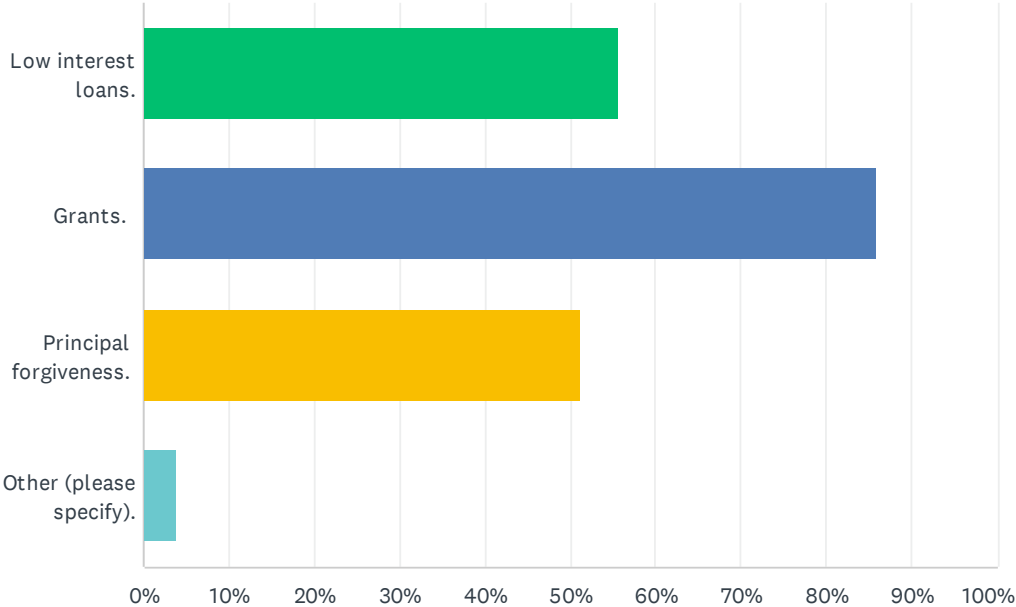
Answered: 233 Skipped: 16



ANSWER CHOICES	RESPONSES
Yes.	74.68% 174
No.	25.32% 59
TOTAL	233

Q27 If you answered “Yes” to question 26, what type of financial assistance would you prefer? (Please select all that apply.)

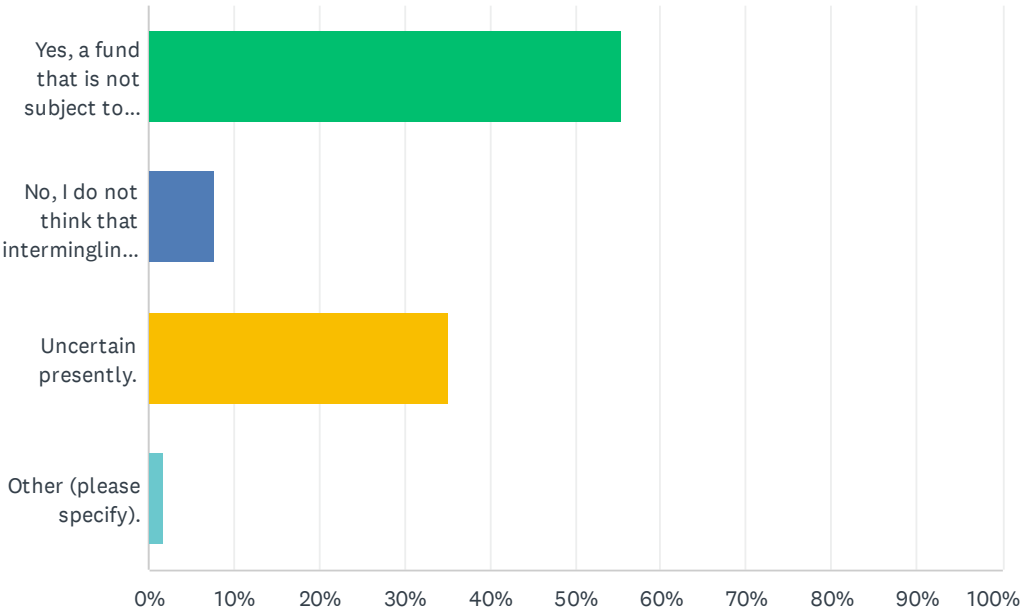
Answered: 178 Skipped: 71



ANSWER CHOICES	RESPONSES	
Low interest loans.	55.62%	99
Grants.	85.96%	153
Principal forgiveness.	51.12%	91
Other (please specify).	3.93%	7
Total Respondents: 178		

Q28 Do you support using funding from the Texas Water Fund as a “state only” fund, such as the Rural Water Assistance Fund, SWIFT etc., to avoid additional federal requirements such as American Iron & Steel (AIS), BABAA or NEPA (federal environmental reviews)?

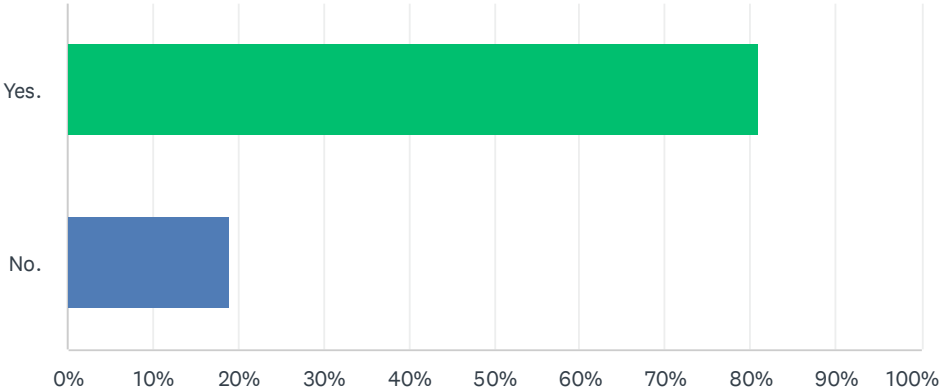
Answered: 236 Skipped: 13



ANSWER CHOICES	RESPONSES	
Yes, a fund that is not subject to Federal requirements is our preference.	55.51%	131
No, I do not think that intermingling State and Federal funding presents a significant cost increase or regulatory burden.	7.63%	18
Uncertain presently.	35.17%	83
Other (please specify).	1.69%	4
TOTAL		236

Q29 Do you support the State dedicating a portion of annual tax revenues or fees similar to the way highways are funded in Texas to ensure a consistent reliable revenue stream to assist with funding future water infrastructure projects?

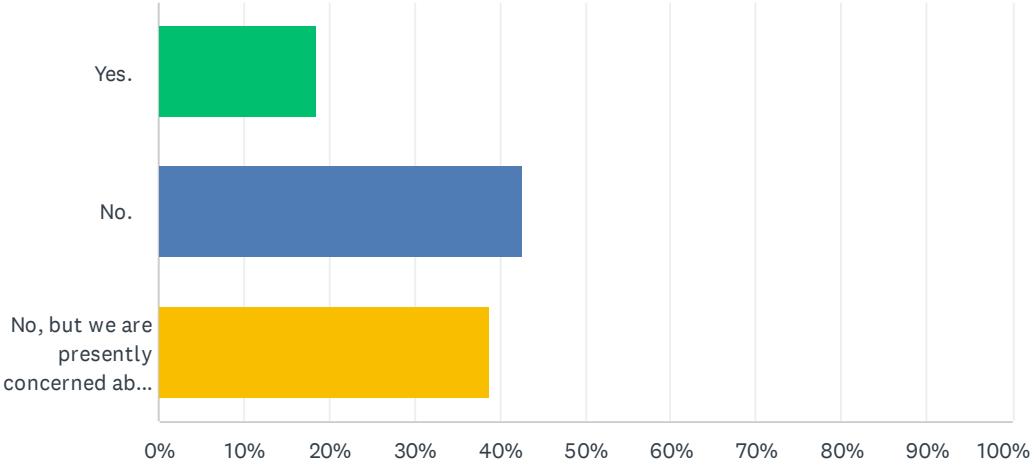
Answered: 238 Skipped: 11



ANSWER CHOICES	RESPONSES
Yes.	81.09% 193
No.	18.91% 45
TOTAL	238

Q30 Have current inflationary/economic issues impacted or impaired your ability to access affordable financing, bonds, or commercial paper from private sector providers?

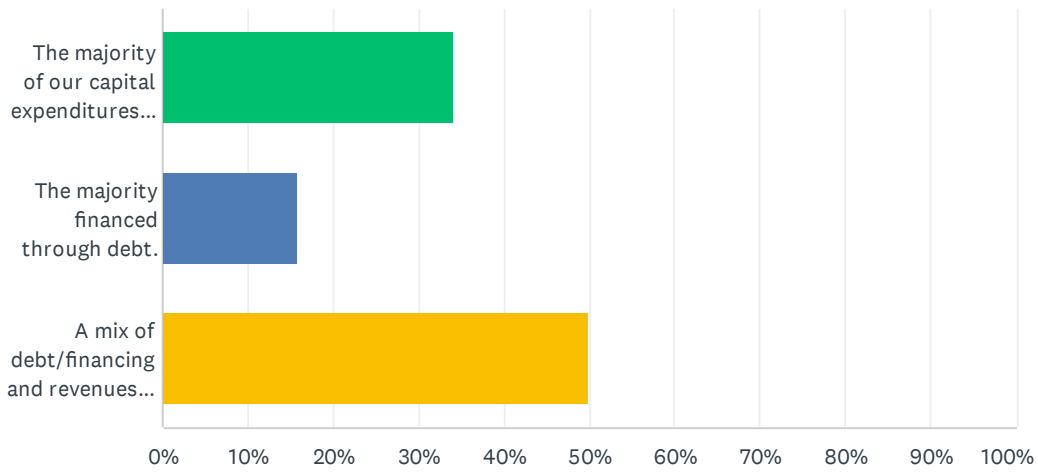
Answered: 237 Skipped: 12



ANSWER CHOICES	RESPONSES	
Yes.	18.57%	44
No.	42.62%	101
No, but we are presently concerned about the cost of financing, and/or our ability to access affordable debt financing in the future.	38.82%	92
TOTAL		237

Q31 How do you prefer to fund your capital programs?

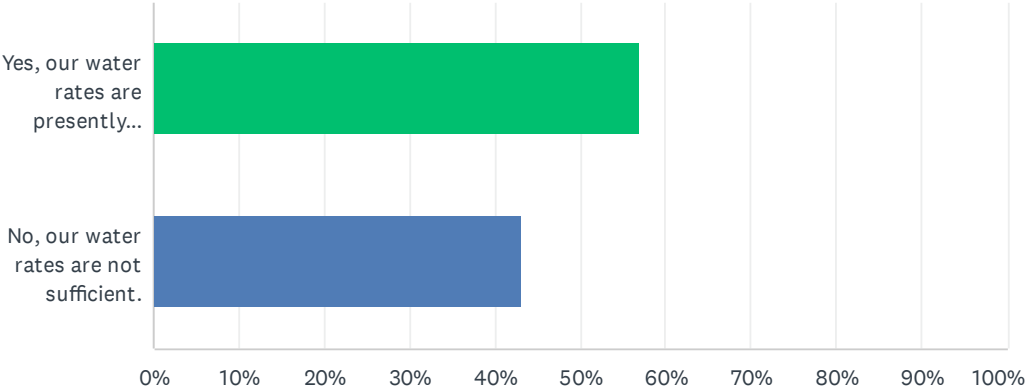
Answered: 240 Skipped: 9



ANSWER CHOICES	RESPONSES	
The majority of our capital expenditures are paid for by water user fees and reserves.	34.17%	82
The majority financed through debt.	15.83%	38
A mix of debt/financing and revenues charged to customers.	50.00%	120
TOTAL		240

Q32 Are your water rates sufficient to fund your current and future capital programs? (Please select all that apply.)

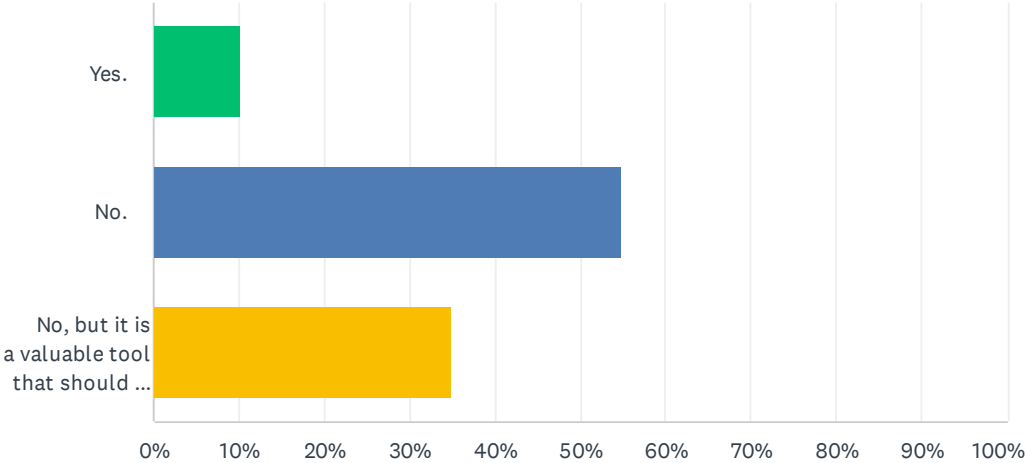
Answered: 239 Skipped: 10



ANSWER CHOICES	RESPONSES	
Yes, our water rates are presently sufficient.	56.90%	136
No, our water rates are not sufficient.	43.10%	103
TOTAL		239

Q33 Are you currently using, or do you plan to use, Certificates of Obligation?

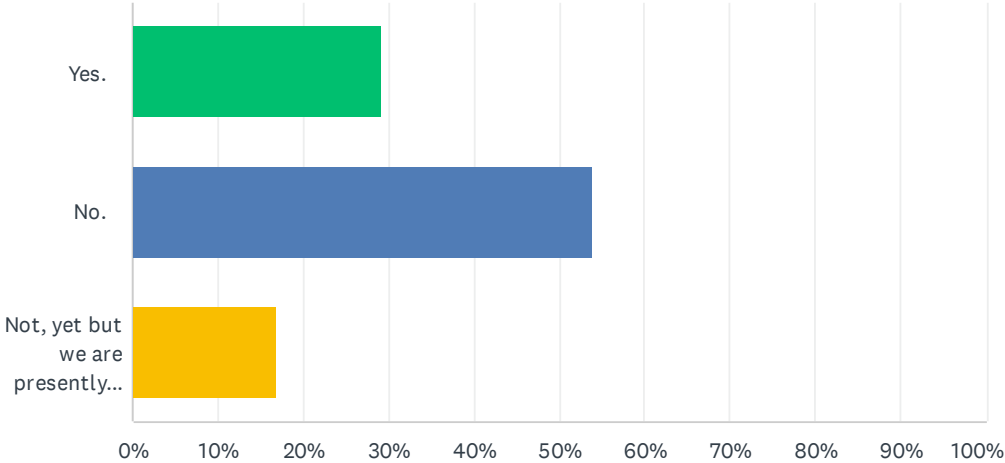
Answered: 234 Skipped: 15



ANSWER CHOICES	RESPONSES	
Yes.	10.26%	24
No.	54.70%	128
No, but it is a valuable tool that should be available as needed.	35.04%	82
TOTAL		234

Q34 Have you cancelled, delayed or re-bid capital projects over the last two years due to inflation, or cost escalation?

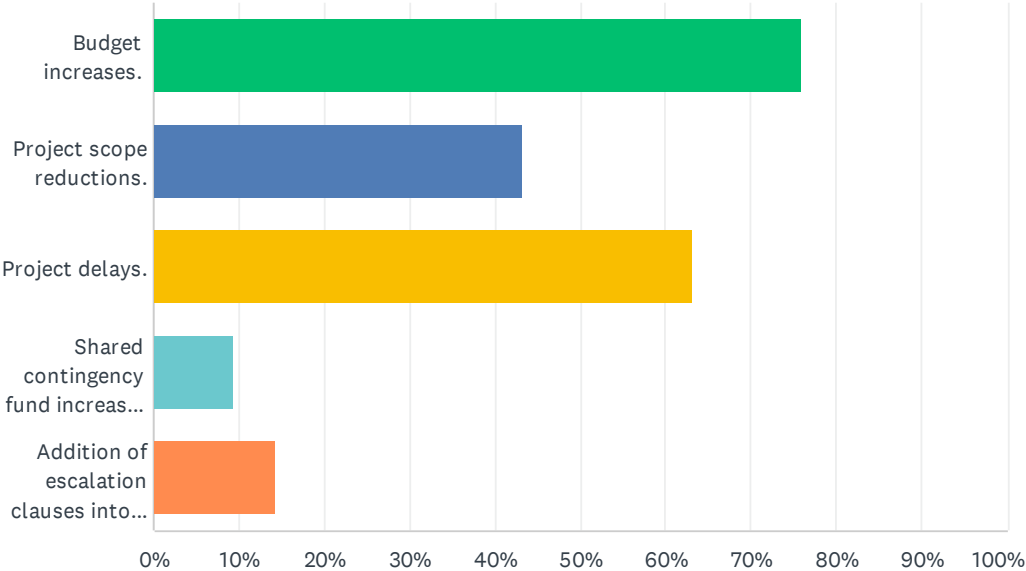
Answered: 237 Skipped: 12



ANSWER CHOICES	RESPONSES	
Yes.	29.11%	69
No.	54.01%	128
Not, yet but we are presently struggling with the issue.	16.88%	40
TOTAL		237

Q35 Have increased construction costs due to inflationary conditions and supply chain issues caused you to do any of the following? (Please select all that apply.)

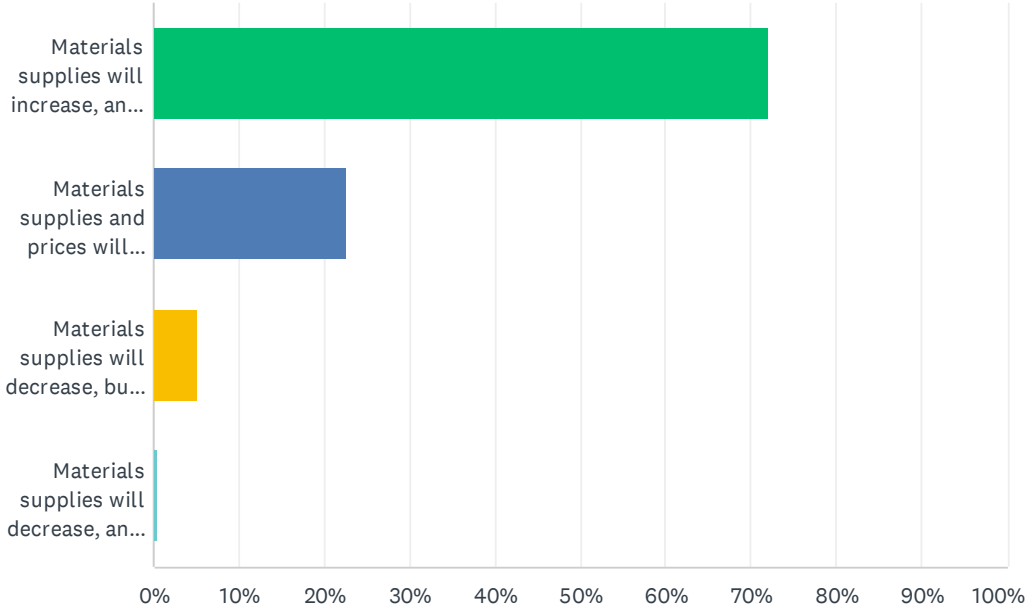
Answered: 203 Skipped: 46



ANSWER CHOICES	RESPONSES	
Budget increases.	75.86%	154
Project scope reductions.	43.35%	88
Project delays.	63.05%	128
Shared contingency fund increases to minimize risk.	9.36%	19
Addition of escalation clauses into contracts.	14.29%	29
Total Respondents: 203		

Q36 What are your expectations on current construction industry materials prices and shortage conditions through the end of 2024?

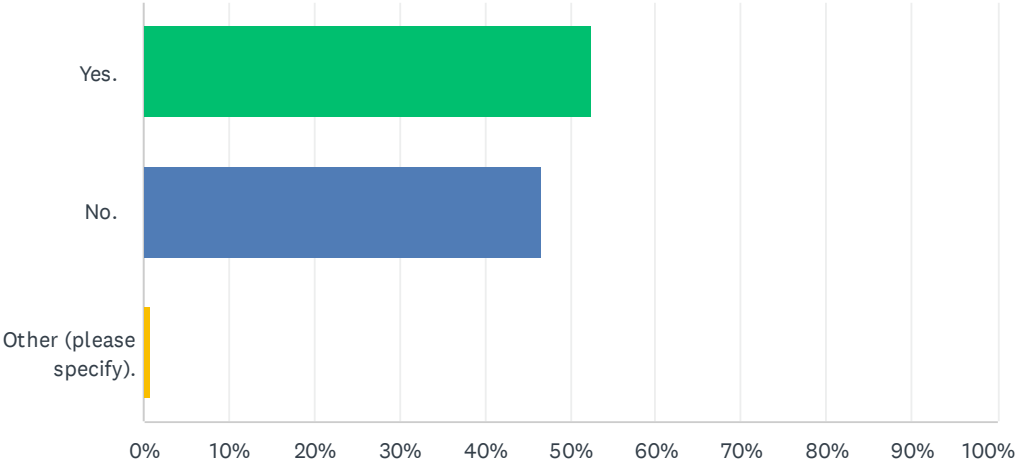
Answered: 239 Skipped: 10



ANSWER CHOICES	RESPONSES	
Materials supplies will increase, and prices will rise.	71.97%	172
Materials supplies and prices will stabilize at current levels.	22.59%	54
Materials supplies will decrease, but prices will stabilize at current levels.	5.02%	12
Materials supplies will decrease, and prices will fall.	0.42%	1
TOTAL		239

Q37 Are you concerned about having an adequate number of qualified bidders on your projects?

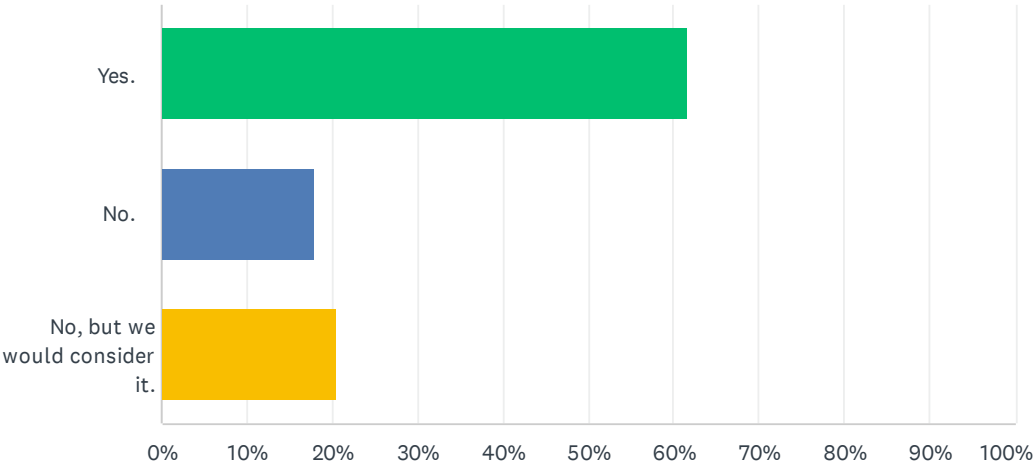
Answered: 242 Skipped: 7



ANSWER CHOICES	RESPONSES
Yes.	52.48% 127
No.	46.69% 113
Other (please specify).	0.83% 2
TOTAL	242

Q38 Do you prequalify contractors for your projects?

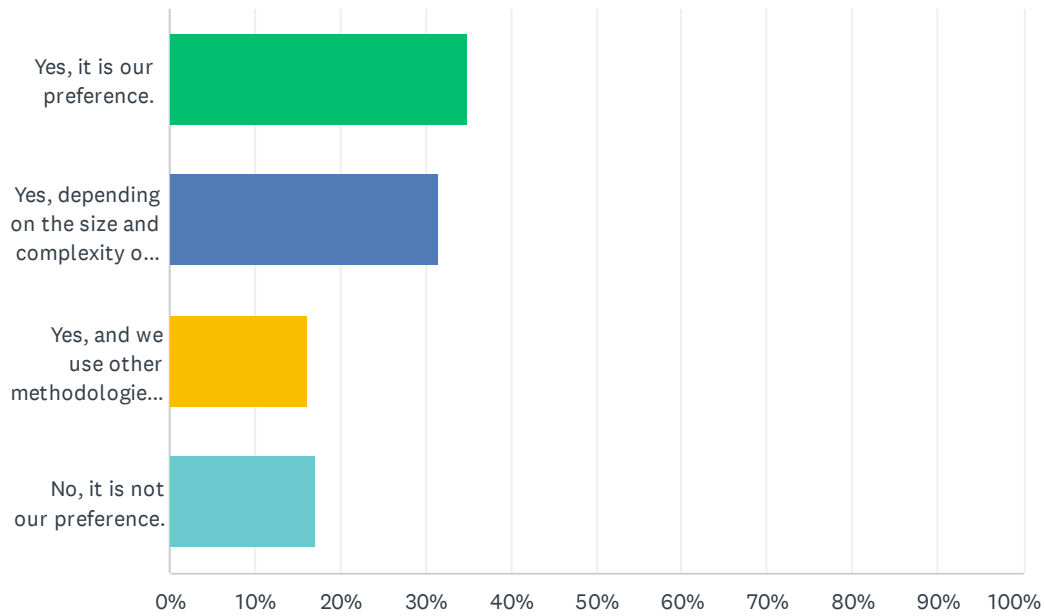
Answered: 240 Skipped: 9



ANSWER CHOICES	RESPONSES	
Yes.	61.67%	148
No.	17.92%	43
No, but we would consider it.	20.42%	49
TOTAL		240

Q39 Do you use traditional design-bid build to solicit and execute projects?

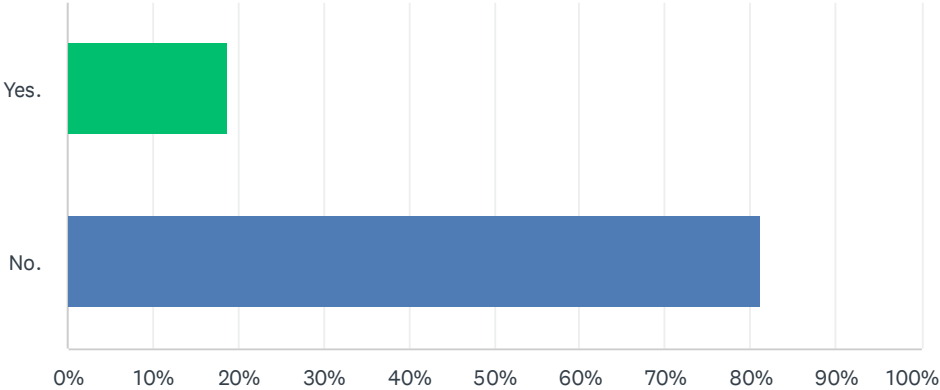
Answered: 234 Skipped: 15



ANSWER CHOICES	RESPONSES	
Yes, it is our preference.	35.04%	82
Yes, depending on the size and complexity of the project.	31.62%	74
Yes, and we use other methodologies as well.	16.24%	38
No, it is not our preference.	17.09%	40
TOTAL		234

Q40 Do you presently use or are you considering using Construction Manager-at-Risk for your capital programs?

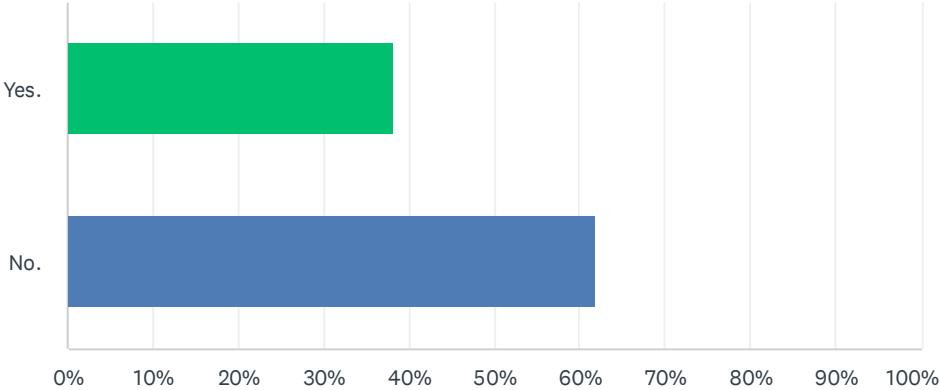
Answered: 235 Skipped: 14



ANSWER CHOICES	RESPONSES	
Yes.	18.72%	44
No.	81.28%	191
TOTAL		235

Q41 Do you presently use or are you considering using Design-Build for your capital programs?

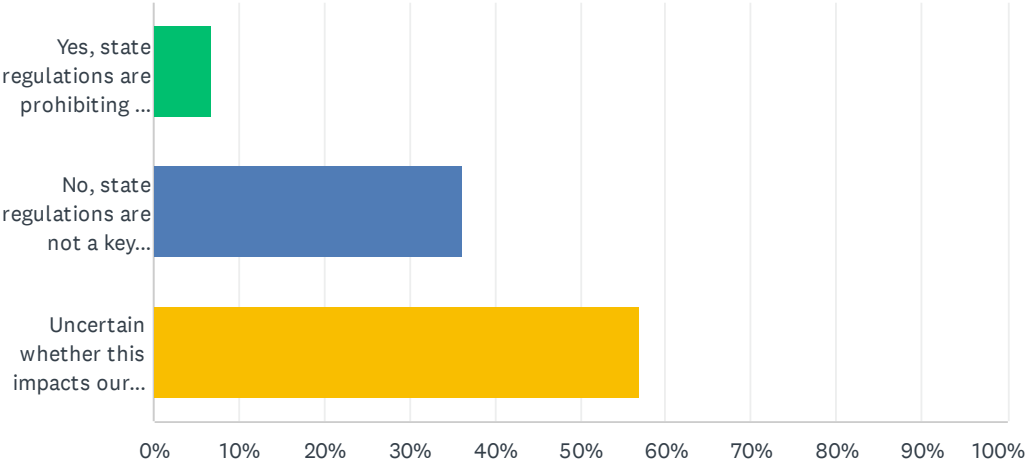
Answered: 233 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes.	38.20%	89
No.	61.80%	144
TOTAL		233

Q42 If you answered “No” to question 41, are state regulations restricting use of Civil Works Design-Build for service areas/populations of less than 100,000 prohibiting you from utilizing this method?

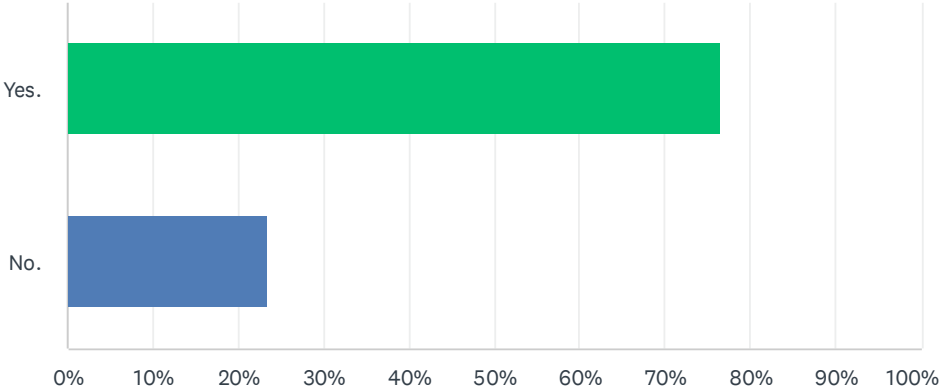
Answered: 160 Skipped: 89



ANSWER CHOICES	RESPONSES	
Yes, state regulations are prohibiting us from utilizing design-build for water infrastructure projects.	6.88%	11
No, state regulations are not a key factor in our choice not to utilize design-build for water infrastructure projects.	36.25%	58
Uncertain whether this impacts our ability to use design-build.	56.88%	91
TOTAL		160

Q43 Do you currently, or have you in the past used Competitive Sealed Proposals for your capital programs?

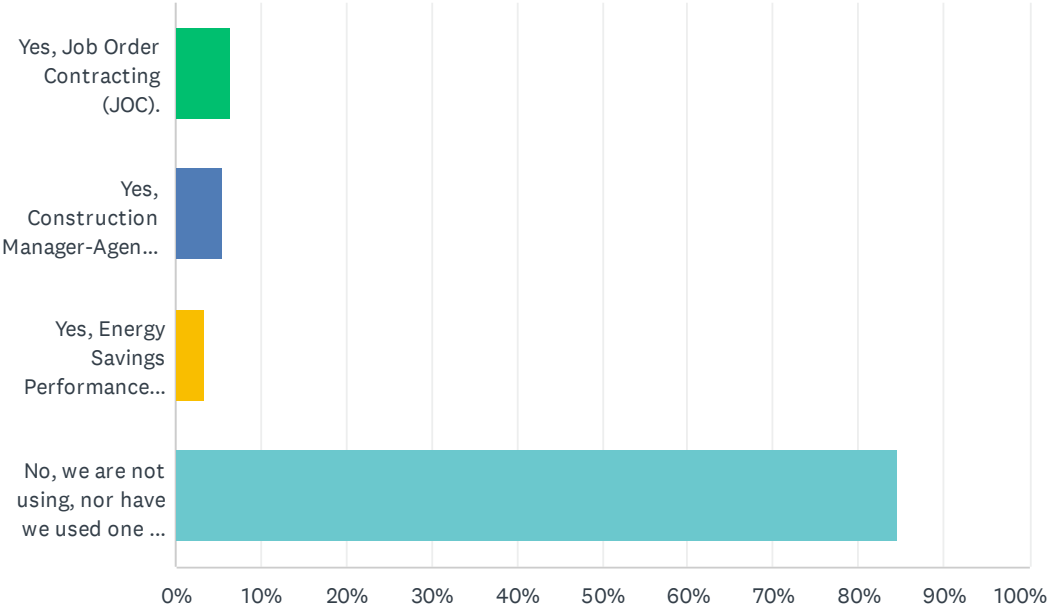
Answered: 239 Skipped: 10



ANSWER CHOICES	RESPONSES	
Yes.	76.57%	183
No.	23.43%	56
TOTAL		239

Q44 Do you currently, or have you in the past used Job Order Contracting (JOC), Construction Manager Agent, or Energy Savings Procurement Contracting (ESPC) methodologies for your capital programs.

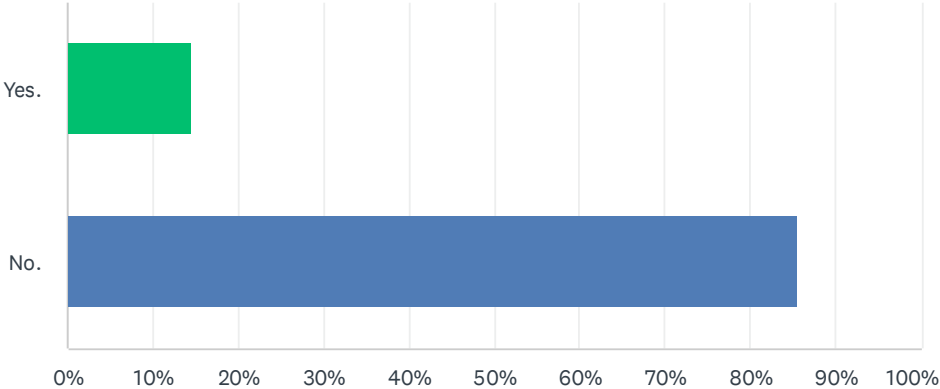
Answered: 233 Skipped: 16



ANSWER CHOICES	RESPONSES	
Yes, Job Order Contracting (JOC).	6.44%	15
Yes, Construction Manager-Agent (CMA).	5.58%	13
Yes, Energy Savings Performance Contracting (ESPC).	3.43%	8
No, we are not using, nor have we used one of these methodologies.	84.55%	197
TOTAL		233

Q45 Are you currently using, or have you in the past used Public Private Partnerships (PPP) or other alternative private financing options to build, maintain and operate facilities?

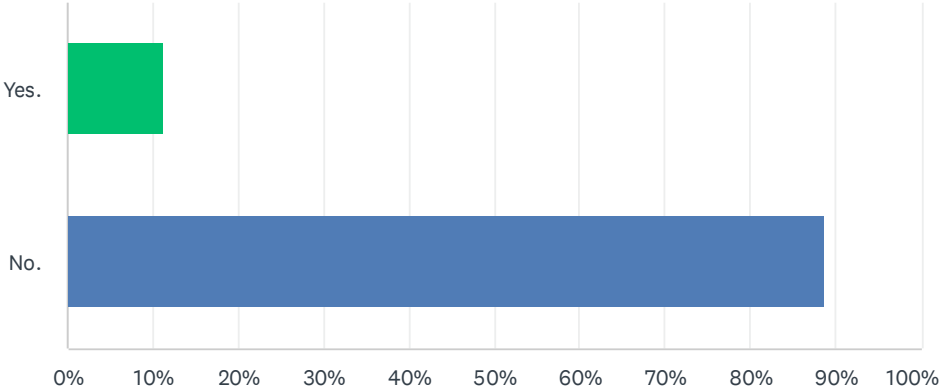
Answered: 234 Skipped: 15



ANSWER CHOICES	RESPONSES
Yes.	14.53% 34
No.	85.47% 200
TOTAL	234

Q46 Have you changed procurement approaches or project delivery methods to mitigate costs or schedule risk due to current market conditions?

Answered: 232 Skipped: 17



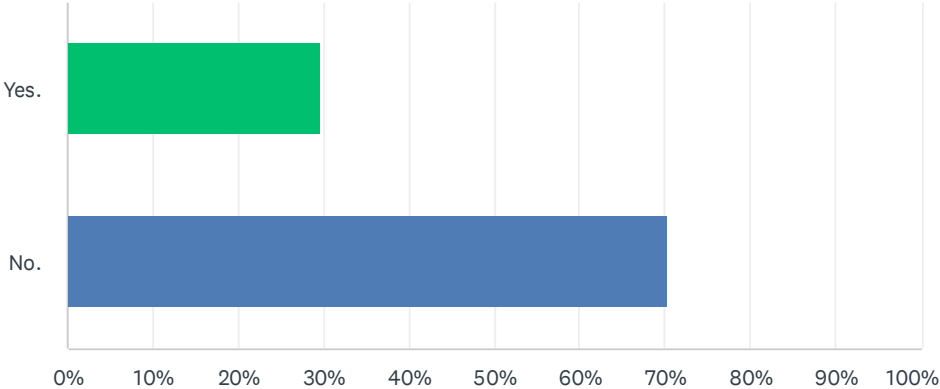
ANSWER CHOICES	RESPONSES	
Yes.	11.21%	26
No.	88.79%	206
TOTAL		232

Q47 If you answered "Yes" to question 46 please explain why you have elected to do so.

Answered: 22 Skipped: 227

Q48 Do you think the Texas Legislature has allocated sufficient resources and attention to address water policy and facilitate investment in Texas water infrastructure and water supplies?

Answered: 237 Skipped: 12



ANSWER CHOICES	RESPONSES	
Yes.	29.54%	70
No.	70.46%	167
TOTAL		237

Q49 If you are interested in sharing capital project forecasts and bid opportunities with TXWIN member companies please enter your email here.

Answered: 26 Skipped: 223

ANSWER CHOICES	RESPONSES	
Email address	100.00%	26

**Q50 Please enter the primary zip code of your corporate headquarters.
This will help with data quality assurance.**

Answered: 212 Skipped: 37