

# PORTLAND UTILITY BOARD

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**Members:**

Alexis Rife

Bob Sallinger

Christopher Richard

Heather Day-Melgar

Julia DeGraw

Karen Williams, Co-Chair

Lorraine Wilson

Robin Castro

Theresa Huang

Tom Liptan

**Ex-officio Members:**

Joe Spada

Sarah Messier

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To: Mayor Ted Wheeler

Commissioner Mingus Mapps

Commissioner Carmen Rubio

Commissioner Dan Ryan

Commissioner Jo Ann Hardesty

Dawn Uchiyama, Bureau of Environmental Services

Gabriel Solmer, Portland Water Bureau

Re: Portland Utility Board FY 2021-22 Annual Report and Work Plan

Date: September 29, 2022

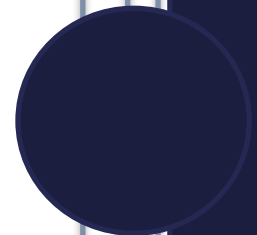
The Portland Utility Board (PUB) serves as a community advisory board for the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB). Per Chapter 3.123 of Portland City Code that governs the PUB, please find attached the PUB's annual report for Fiscal Year 2021-22 and a preliminary workplan for the current year. The Board looks forward to your input and engaging with Council and the bureaus in the coming year.



# PORTLAND UTILITY BOARD

*FY 2021-22 Annual Report to Council*

*September 2022*



# Portland Utility Board Annual Report and Work Plan

## Executive Summary

The Portland Utility Board (PUB or Board) is a community-based advisory body tasked with advising City Council and bureau leadership on operational, budgetary and policy matters related to the two utility bureaus, the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB).

For the PUB, as for many, Fiscal Year 2021-22 was marked by pandemic fatigue and ongoing attention to evolving economic issues, issues of racial equity, and the unfolding climate crisis. These challenges are reflected in the work the Board prioritized this year, e.g., recommendations on billing, debt recovery practices, and financial assistance programs; analysis of workplace racial equity issues; initial recommendations related to the Lead Hazard Reduction Program; analysis and recommendations on the Advanced Metering Infrastructure (AMI) project; and engagement with issues related to the BES Rate Study and the Portland Harbor Superfund site. The Board utilized small PUB member teams to effectively move policy work forward and hopes to continue to expand on this model in ways that ensure positive outcomes and enhance collaboration between the Board and the bureaus. The Board appreciated the visit from Commissioner Mapps during the fall of 2021 and subsequent increased communication with the Commissioner's office. The Board looks forward to strengthening the relationship and finding opportunities for collaboration on shared priorities.

For FY 2022-23 the Board will continue to use the frames of racial equity; the climate crisis and climate justice; innovation and efficiency; and inter-agency and cross-sector collaboration to guide its work. In addition to continuing the policy work begun in the previous fiscal year, the Board looks forward to providing input on important ongoing projects, e.g., capital work at the Columbia Boulevard Wastewater Treatment Plant and the continued development and fine-tuning of the financial assistance programs. With six new Board members joining on July 1, 2022, the Board also looks forward to integration of new Board members in ways that strengthen the working relationships between the Board, the bureaus, and the Commissioner-in-Charge's office. Working together, the Board believes we can find equitable solutions to the many issues facing clean drinking water, sanitation, and stormwater management services—fundamental necessities for human life and the planet.

## Introduction

The Portland Utility Board (PUB) began its service to the City on September 1, 2015. It provides budgetary and policy oversight of Portland's utility bureaus – the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB). Throughout the year there were many

opportunities for the PUB to give recommendations and feedback to Council and bureau leadership that informed decision-making and actions taken.

## Issues Considered

The Board has increasingly focused on issues of racial equity, inclusion, and social justice; the difficult work of balancing rates with the need for modern, resilient infrastructure and the complicated issue of how equity informs this balancing act; a reconsideration of affordability through the lens of equity; and the policy and programmatic decisions that inform the budget numbers. The Board believes these are the areas where the input of a community-based advising body can be most impactful. Table 1 lists the key issues the PUB focused on during FY 2020-21. Many other topics not listed were also considered and discussed.

**Table 1: Key Issues the PUB Considered in FY 2021-22**

Topic	Budget	Policy
Annual Budget Review and Recommendations	X	X
Advanced Metering Infrastructure	X	
Community Engagement Strategies		X
Comprehensive Rate Study (BES)	X	X
Financial Assistance Programs, Billing, and Debt Recovery	X	X
Hiring, Retention, and Promotion of BIPOC staff		X
Honorariums for Advisory Bodies		X
Intersections of Bureaus' Work and Houselessness and the Housing Crisis	X	X
Lead Hazard Reduction Program Funding & Potential Expansions	X	X
Portland Harbor Superfund Site		X
Portland Harbor Community Grants	X	X
PUB Governing Documents Updates		X
PUB Recruitment		X
Tree Program Updates		X

*Note: The check marks are meant to indicate areas emphasized. For most topics both budgetary and policy ramifications were considered. Equity was a lens applied to every topic.*

## Accomplishments and Impact

The Board's accomplishments reflect its continued focus on process, equity, inclusion, and upstream policy work. While the ongoing constraints of the pandemic, e.g., the limitations of a virtual meeting environment and general pandemic fatigue impacted the Board's work, the Board, nonetheless, accomplished significant work.

**Policy Analysis Project Teams** — This year the Board utilized a model, whereby small teams of 1 or 2 PUB members worked in-depth on a policy area outside of full board meetings. The project team then brought back synthesized research, findings, and initial suggestions for next

steps and/or recommendations to a board meeting for the full Board’s discussion, decision, and should the Board decide to act, subsequent action. While this approach required significant outside-of-meeting time for the project team members, initial results suggest it is an effective way for the Board to move forward critical policy items within the Board’s governance structure. It also fostered deeper connections between project team members. By delegating initial work, it also increased intra-Board trust and a sense of egalitarianism whereby PUB members can step in to contribute where they have interest and expertise. The Board hopes to continue and expand on this methodology in the coming year.

In alphabetic order, highlights of the Board’s accomplishments include:

- Billing, Debt Recovery, and Financial Assistance** — Building on the groundwork of previous fiscal years, the PUB developed a robust set of recommendations around billing, debt recovery practices, and the financial assistance programs. The Board continued to encourage the bureaus to create policies and practices that center the needs of those most impacted by structural inequities. For example, by both expanding support to renters and working to address the inequities in the current assistance available to renters; and by *actively* providing and offering translation and interpretation in all communications. The Board supported the bureaus’ requests for American Rescue Plan Act (ARPA) funds to increase financial assistance offerings and recommended the bureaus offer another round of Small Business Program for Utility Relief (SPUR) credits. The Board also advised on bigger picture policy issues, e.g., exploring alternative funding sources and models for providing basic water, sewer, and stormwater services. See Appendix A for a full summary of the PUB’s recommendations to-date around billing, debt recovery, and financial assistance. **City Response:** PWB accepted the PUB’s recommendations, has continued to engage with the PUB on these topics and will report back on progress in FY 2022-23.
- Budget Analysis and Recommendations** - BES staff report they have found the PUB’s approach to budget analysis to be efficient. Compared to prior approaches, it results in Board feedback they find more actionable. This approach, piloted in FY 2019-20 and continued in FY 2020-21, focuses on deeper analysis of programs selected for alignment with the PUB’s priorities. The Board will continue to fine-tune this approach in collaboration with the bureaus. The PUB provided

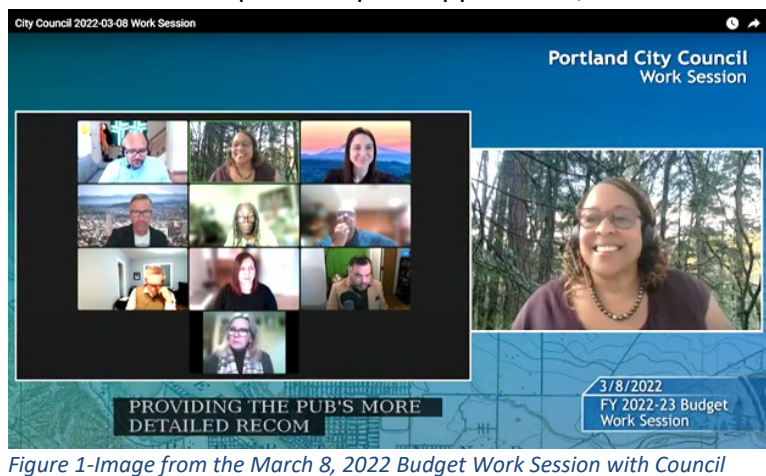


Figure 1-Image from the March 8, 2022 Budget Work Session with Council



an early recommendation letter with the bureaus' Requested Budgets, provided testimony to Council at the budget work session regarding the Board's identified budget priorities and concerns, and a final budget recommendation letter (see Appendix D for the letters or [view testimony video online](#)). **City Response:** City Council accepted the PUB's testimony and budget letters but did not accept all of the recommendations (e.g. AMI was included in the FY 2022-23 Budget).

- **Demographic Data Collection in Employee Surveys** — At its October 5, 2021 meeting the PUB made an early recommendation that in planning for return to office the bureaus collect qualitative, demographic, and other relevant data in order to assess the impacts, in particular the potential disparate impacts on Black, Indigenous, People of Color (BIPOC) employees. This recommendation was made because initial research suggested that very few jurisdictions were considering racial equity in their pandemic-related workplace planning. The Board successfully added its voice to the many others that were calling on the City to pay attention to these racial equity issues. **Related City Actions:** In June of 2022 the City conducted a City-wide workplace survey of all employees whether working on-site, remote, or hybrid, which included demographic data and analysis. The City has formed a stakeholder group, including representatives from Diverse and Empowered Employees of Portland (DEEP), Equity Managers and Office of Equity and Human Rights, to collaborate and develop recommendations for City Council on next steps using this data and feedback.
- **Equity-focused Code and Bylaws Changes** — The Board successfully brought code changes to Council which increased equity, e.g., by replacing 'citizen' with 'people' and changing reference from 'Chair' to 'Co-Chairs', which more accurately reflects the PUB's current practices and the egalitarian principles it strives to embody. After changing code, the Board made analogous changes to its bylaws. To help ensure the previously adopted *Beliefs, Values, and Anti-Racist Principles* remain living and acted upon, the PUB also included explicit reference to them and the need for annual review in the bylaws. Finally, the Board greatly expanded the non-discrimination clauses in both its bylaws and its *Beliefs, Values, and Anti-Racist Principles*. The PUB's governing documents can be found here: <https://www.portland.gov/pub/governing-documents>.
- **Honorariums** — The PUB rolled out a successful pilot of honorariums with the spring recruitment for new Board members. The pilot included a simple request form; low-barrier disbursement methods; the ability of the recipient to choose method of payment; and simple internal accounting processes. The PUB looks forward to sharing these procedures with others interested in implementing honorariums. A goal for the coming year is to work with internal City business partners to find ways to expedite the disbursement processes.

- **Lead Hazard Reduction Program Recommendations** — Using the policy project team model, voting member, Julia DeGraw, developed initial policy recommendations and ex

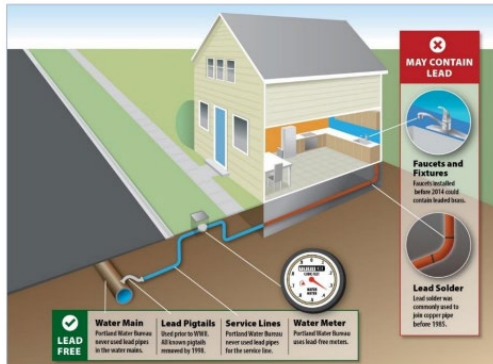


Figure 2- Image pulled from PWB LHRP Powerpoint presentation materials used in 2019 and 2022.

officio member Sarah Messier provided technical assistance, e.g., fact checking and additional contextual details about the current Lead Hazard Reduction Program (LHRP). These draft recommendations were discussed by the Board with amended recommendations adopted at the PUB's May 19, 2022 meeting. The Board looks forward to conversation and future exploration with the Commissioner-in-Charge and Council about securing ongoing funding for the LHRP and potential expansions. See Appendix B for the initial memo from Julia DeGraw to the Board and the adopted recommendations.

- **LHRP Recommendations Development: A Model for Collaborative work** — The Portland Water Bureau appreciates the Board's deep dive into the facts and opportunities around the Lead Hazard Reduction Program and associated programs and the Board's initial progress to move forward actionable recommendations. PWB believes the Board-bureau program partnership utilized to develop these initial recommendations is a model for future work.
- **Portland Harbor Community Grant Program** — In response to a request from the Portland Harbor Grant Committee, the PUB provided written input and oral testimony to Council in support of increased funding for the grant program. The Board completely agreed with the community-based grant committee's analysis that the current funding was insufficient and continued City practices of underfunding impacted communities for the expertise and work that only they can deliver. **City Response:** Council ultimately decided to increase funding to the Portland Harbor Community Grant Program. The PUB was delighted at the opportunity to act in partnership and solidarity with the grant committee and looks forward to other such future opportunities. See Appendix D for the Board's memo to Council.
- **PUB Recruitment** — BES staff report that they appreciated the opportunity to participate in the PUB recruitment process and interview team. They felt it was a good process with good outcomes. They particularly valued the opportunity to work side-by-side with PUB members on the project. This afforded an opportunity to build relationships and develop better understanding of each other's goals, working constraints, and values. They look forward to additional opportunities to work together in bureau staff-PUB member project teams on appropriately scaled projects.

- **Tree Program Changes Feedback** — In response to changes in the City’s tree programs, the PUB provided substantive feedback to BES, and through BES also to Portland Parks and Recreation, that focused on the community’s experience of the tree program changes as well as the need for continued inter-bureau conversations, collaboration, ongoing evaluation, and information sharing. **City Response:** This feedback was helpful in BES’ decision to find ways to ensure that community participation continued to be a part of any program the BES Tree Team built out and serves as a useful perspective and touchpoint as the City’s tree programs continue to evolve.
- **Workplace Racial Equity Mid-Pandemic Report** — Voting members, Karen Y. Spencer and Theresa Huang, acting as a PUB policy project team, produced an extensive preliminary report on workplace racial equity issues. While the report was not intended to be exhaustive, with acumen it shone a light on many areas worthy of further exploration and action. The five thematic areas covered by the report include: the need to disaggregate data by race and ethnicity, analyze it, and act on it; the need to collect and use qualitative data and incorporate community knowledge as data; the need to apply an equity lens to the temporary employee experience and act on findings; the need to analyze and address racial disparities in career trajectories; and the need to use return to office to level set culture and workforce environment expectations. **City Response:** The final report was received by the bureaus and bureau leadership are engaging with the PUB on next steps. A hope for the coming fiscal year is that the bureaus, the Commissioner-in Charge’s office, and the PUB might collaborate to identify specific areas for FY 2022-23 focus and perhaps form a bureau-PUB project team to build on both the initial work of the PUB’s project team and the ongoing efforts of the bureaus.

## Fiscal Year 2022-23 Work Plan Frames

The frames the PUB developed for FY 2021-22 continue to be key frames in the coming year. They include racial equity; the climate crisis and the climate justice; innovation and efficiency; and inter-agency and cross-sector collaboration. These frames function as over-arching themes the Board applies to all topics and issues it considers. Bureau leadership and City Council can expect them to be reflected in the questions the Board raises during meeting presentations as well as in the policy recommendations and advice the Board provides.

### Racial Equity

The Board will continue to center racial equity in all its decision-making. Black, Indigenous, and People of Color (BIPOC) communities bear an inequitable burden due to the impacts of past and current policies and practices rooted in systemic racism, e.g., policies around urban development or workforce development. For example, a BIPOC low-income family experiences deeper disparities and additional barriers compared to a white low-income family. Moreover, systems of inequities interlock and create increased and unique disadvantages for those with



intersectional identities. The PUB will strive to understand and address the impacts of intersectionality as they relate to the work of the Board. For example, the PUB will request disaggregated demographic and geographic data in order to examine service disparities as well as the distribution of benefits and burdens/harms. In developing recommendations, the Board will not only analyze the current distribution of burdens and benefits, but also consider reparative actions that address harm done by inequitable policies, actions, and practices.

### ***The Climate Crisis and Climate Justice***

Earlier and longer wildfire seasons, increased frequency of extreme flooding, extended drought, unseasonable snowstorms, increasing summer heat; we are experiencing the effects of a rapidly changing climate. There are no areas of life that will remain untouched, and the bureaus' work will be central to addressing the impacts of climate change on the community. Recognizing marginalized communities are disproportionately impacted by climate change while contributing less to it and, all too often, benefit less from climate adaptation policies, the Board takes a climate justice approach to addressing the climate crisis. The Board will work to ensure that marginalized communities are included in the decision-making process and that bureau policies equitably distribute the benefits and burdens of climate policy. The Board will encourage the bureaus to amplify efforts to reduce their contributions to climate change, build in resiliency, and implement climate adaptation strategies that address long-standing harms faced by marginalized communities.

### ***Innovation and Efficiency***

The Board will ask questions of innovation and efficiency in analyzing bureau policies, operations, and plans. The Board will look for innovations that result in increased equity, efficiency, cost reductions, and improvements in asset management, policy, engineering and design, maintenance, and operational strategies. The Board will pay special attention to ensuring that innovations and efficiencies advance equity and do not happen at the expense of marginalized communities.

### ***Inter-Agency and Cross-Sector Collaboration***

Many issues are inter-bureau and inter-agency in nature because they are complex and span the work of multiple organizations, e.g., financial assistance programs aimed at providing relief to those most impacted by Portland's skyrocketing cost of living. The Board encourages maintaining a focus on homelessness, understanding the intersection with bureau operations and other agencies, and ensuring policies to address impacts are humanitarian for the community that is most vulnerable. The Board will look for opportunities for collaboration, cooperation, and sharing of resources such as staff expertise and equipment in ways that advance equity and enhance services.



*Figure 3-PUB member asking BES staff about STEP construction map during a tour of CBWTP, July 2022*

## Fiscal Year 2022-23 Work Plan

The PUB prioritizes those issues where there is opportunity to influence City Council and bureau decisions or otherwise impact bureau operations, policies, and budget. Purely informational topics will be secondary in terms of time allotted. The Board's work plan forecasts where there will likely be active critical decision points; where the Board's input will be valuable; and policy areas of high interest to the Board. The work plan is also responsive to shifting needs and input from Board members, Council, bureau leadership, and community. As such it is a high-level work plan meant to be revisited and nimbly adjusted as issues emerge.

**Table 2: Fiscal Year 2022-23 Work Plan Priorities**

High priority items the Board is currently actively engaging in	
<ul style="list-style-type: none"> <li>• Billing, Debt Recovery, and Financial Assistance Programs</li> <li>• <b>Budget Development, Monitoring and Trend Analysis</b></li> <li>• Comprehensive Rate Review Study (BES)</li> <li>• Hiring, Retention, and Promotion of BIPOC staff and ongoing work related to the Board-developed, <i>Workplace Racial Equity Mid-Pandemic Report</i> (See Appendix C)</li> </ul>	<ul style="list-style-type: none"> <li>• Input on Hiring of BES Director</li> <li>• Lead Hazard Reduction Program funding and exploration of potential expansion</li> <li>• Process Coordination, Communication, Accountability and Mutual Trust Building</li> </ul>
Bureau projects and programs of high priority to the PUB — Actively engaged with when opportunities for input and impact arise. Otherwise, the Board receives very brief or written updates.	
<ul style="list-style-type: none"> <li>• Capital Projects               <ul style="list-style-type: none"> <li>○ Advanced Metering Infrastructure (AMI) next steps</li> <li>○ Filtration Projects</li> <li>○ Secondary Treatment Expansion Program- (STEP)</li> <li>○ Tryon Creek Facility</li> <li>○ Other large projects with critical decision points</li> </ul> </li> <li>• Climate Action and Adaptation Strategies               <ul style="list-style-type: none"> <li>○ Green Infrastructure</li> <li>○ Tree Program (next steps)</li> <li>○ Urban Heat</li> </ul> </li> </ul>	<ul style="list-style-type: none"> <li>• Endangered Species Protection Recovery</li> <li>• Organization &amp; Operations               <ul style="list-style-type: none"> <li>○ BES Transition</li> <li>○ Bureau Strategic Plans</li> <li>○ Bureau equity plan updates</li> </ul> </li> <li>• Portland Harbor Superfund</li> <li>• Resilience and Emergency Planning</li> <li>• Procurement and Contracting – equity emphasis</li> <li>• Urban Flood and Safety District</li> <li>• Wholesale Agreements</li> <li>• Other emerging issues</li> </ul>
PUB specific work	
<ul style="list-style-type: none"> <li>• <b>Annual Report and Work Plan</b></li> <li>• Board Development – onboarding and integration/inclusion of new members</li> </ul>	<ul style="list-style-type: none"> <li>• Board Process and Continuous Improvement – for example public responsiveness.</li> <li>• <b>Board Recruitment Related Work</b></li> </ul>

**Bold** is a required topic.

**Process Coordination, Communication, and Mutual Trust Building** — In the FY 2021-22 work plan the Board identified a goal of collaborating with the bureaus to increase transparency in bureau communications with the Board and improve input-gathering processes. The PUB identified the need to be apprised of emerging issues and asked for input when input will have impact on the program or decision-point at hand. When timing is off, opportunities for improvements based on the PUB's feedback are lost and the Board's expertise is under-utilized. Both the bureaus and the Board recognize the complexity of identifying the right time to bring an idea, issue, or project to the PUB for review and have continued to puzzle through these timing issues. Despite effort from both sides this year, timing, coordination, and communication seemed to continue to impact the ability to effectively get work done together, e.g., around workplace racial equity, developing a labor statement, and the Advanced Metering Infrastructure project (AMI), and demonstrates an apparent lack of trust.

A prerequisite to working together to resolve complicated communication and coordination issues is that there be mutual trust, relationship, and respect. Trust and respect are necessary in order to have honest conversations, freely share information and ideas, and come to agreement about potential next steps and what success would look like. Trust and respect also ensure more effective oversight, a more satisfying experience for all, and better outcomes for the communities the bureaus' serve. The fact that the issues of coordination and communication have been perennial concerns identified by all sides, suggests that a step back and a fresh look at mutual trust building might be a productive approach.

There are successes from FY 2021-22 to build on: This year's use of project policy teams as an effective way to get work done and build deeper relations on the team as well as the ongoing practice of creating a bureau-PUB-Commissioner's office recruitment/interview team for open Board positions. The Board offers as a possible next step, identifying a project or two of relatively small scope that would be appropriate for a bureau-PUB project team to work



*Figure 4-Image from the CBWTP facility tour in subsequent fiscal year - July 2022, reported informally as a positive learning and relationship building opportunity for those able to attend.*

together on in a more collaborative way than has been done in the past. The desired outcomes would be a good project **and** increased mutual trust, relationship, and understanding. The Board is excited to hear from the bureaus what ideas they have for increasing trust and improving communication and coordination. The Board looks forward to working with all stakeholders on these issues in the coming year.

## PUB Operations

As noted below, the pandemic continued to impact the Board's operations.

### Member Terms

The Board is composed of eleven voting members who serve three-year terms and three ex officio non-voting members from the bureaus who serve one-year terms. One voting member seat is reserved for an employee of BES or PWB in a represented bargaining unit.

The Board thanks the departing PUB members — Alex Lopez, Gabriela Saldaña-López, Jasmine Varela, Kaliska Day, Karen Y. Spencer, Amy Chomowicz, and Arielle Bradford for lending their expertise, time, leadership, and enthusiasm to the PUB's work. Advancements in the Board's effectiveness and work are due in no small part to their contributions.

**Table 3: PUB member terms for Board members serving in FY 2021-22**

	<b>PUB Member</b>	<b>June 30, 2022</b>	<b>June 30, 2023</b>	<b>June 30, 2024</b>
<b>Voting</b>	Alex Lopez, <i>early resignation</i>	X		
	Cayle Tern			X
	Gabriela Saldaña-López	X		
	Jasmine Varela, <i>early resignation</i>	X		
	Julia DeGraw		X	
	Kaliska Day	X		
	Karen Y. Spencer	X		
	Karen Williams (reappointed to 2025)	X		
	Robin Castro		X	
	Theresa Huang		X	
	Tom Liptan		X	
<b>Ex-Officio</b>	Amy Chomowicz	X		
	Arielle Bradford	X		
	Sarah Messier (reappointed to 2023)	X		

### Recruitment

Recruitment ran in the spring of 2022 with new members joining on July 1, 2022. Two voting Board members, Alex Lopez and Jasmine Varela, whose terms ran from July 1, 2021 through June 30, 2024 resigned due to increased time constraints in their schedules. Thus, the Board had 6 voting member seats to fill. The voting member appointees from the spring 2022 recruitment with terms beginning July 1, 2022 and ending June 30, 2025 include Alexis Rife, Bob Sallinger, Christopher Richard (represented/labor voting member), Heather Day-Melgar, Karen Williams (re-appointed for a second term), and Lorraine Wilson.

The ex officio appointments for the term beginning July 1, 2022 and ending June 30, 2023 include, Sarah Messier (reappointed) and Joe Spada, both from PWB. At the time of this report, BES was in the process of identifying their ex officio appointment.

### **Recruitment Process**

The recruitment process varies depending on the type of vacancy.

**Community Voting Seats** — Relatively unique to City advisory bodies, the team tasked with reviewing the recruitment process, applications, and conducting interviews for the community voting seats includes current Board members, utility bureau staff, and a representative from the Commissioner-in-Charge's office. The goal is to ensure that all stakeholders have a voice in the process and are engaged in the outcomes. The explicit inclusion of Board members helps maintain a level of independence from City Council and City staff. This spring the team experienced several challenges, including complicated and restricted scheduling as well as perhaps simply pandemic related fatigue within the team and applicants. Despite the challenges of the year, recruitment was successful with extremely qualified applicants. The number of applicants was approximately the same as in the last two previous cycles. The team's appointment recommendations were passed to the full Board for review and the Board's subsequent recommendations were sent to the Commissioner-in-Charge and the Mayor for their review and to bring to Council for official appointment.

The team identified a goal of creating additional time to discuss vision, goals, and desired outcomes for next year's recruitment. Two members from this year's team also met for an in-depth debrief to identify additional potential process improvements.

**Represented Voting Seat** — There are five unions with members in at least one of the bureaus: AFSCME 189, IBEW 48, Operating Engineers 701, PROTEC 17, and LiUNA 483. Since Jasmine Varela gave early notice of her need to vacate the represented seat, Rob Martineau, President of the District Council of Trade Unions (DCTU) and President of AFSCME Local 189, in consultation with the unions, reached out to members who had shown interest during the recent recruitment. The unions nominated Christopher Richard to fill the seat and he was appointed by Council.

**Ex officio Seats** — Bureau leadership identify their recommendations for ex officio non-voting member seats based on the Board's needs, staff availability, and, per code, balancing the one voting represented seat and the three ex officio seats between the bureaus for represented and non-represented employees. Since ex officio members serve one-year terms, this is an annual process.

### **Co-Chair Appointment**

Though Co-Chair terms are typically staggered, the pandemic threw a wrinkle into the process and both Co-Chair terms ended on June 30, 2022. Re-appointed, Karen Williams graciously agreed to extend her Co-Chair term through December 31, 2022 to provide stability to the



Board during the transition. The Co-Chair's intention is to step-aside if and at such time as there are two other Board members wishing to serve as Co-Chairs.

### **Member Experience and Interests**

The ordinance governing the PUB identifies a broad range of skills and experiences that serve the Board well, from environmental science to equity to group process to capital projects. The Board continues to puzzle through the complicated nuances of what experiences and interests are needed for the PUB's work. Where has dominant culture over-emphasized one skill set and/or over-looked or not recognized a skill set essential to moving the work of the PUB, the bureaus, and Council forward? How is the nature and scope of the Board's work structured to ensure participation from folks with a wide variety of knowledge, skills, and lived experience? This year's recruitment/interview team identified a goal to revisit these questions and dig a little deeper during the coming year.

### **Member Service**

The Board contributes significant time, expertise, and value in its service to the City.

***PUB Meetings*** — As a public body, the Board's decision-making work is done within a public meeting setting. To accomplish this work, in FY 2021-22, the PUB held 31 Board meetings, including 24 full Board meetings, 5 subcommittee meetings, and 2 onboardings for new PUB members. As described previously, the Board also developed a project-based team model to conduct research and synthesize findings and suggestions to bring to the full Board for review, discussion, and decision-making. These policy project teams spent significant time outside of meetings in order to develop their reports to the Board. In addition, all Board members spend time outside of meetings preparing for meeting discussions, conducting research, developing communications to Council, and following up on individual lines of inquiry.

***Public Comment*** — The Board's meetings are open to the public and dedicate time during agendas to receive comment from members of the public, both as general comments as well as just prior to any formal Board decisions. In FY 2021-22, there were 30 unique members of the public that engaged in the Board's meetings for a total of 72 meeting attendances and 13 public comments submitted formally during meetings. The primary issues raised related to lead in drinking water, the PUB filter program and water quality. Additional topics included affordability with connection to the human right to water and support for a Board action in May 2022 relating to the lead hazard reduction program funding recommendations. In addition to these comments, several members of the public attended meetings to participate and provide background to the PUB in the Board policy actions such as consideration of the Portland Harbor Grant proposal. The Board intends to receive and be responsive to public comment when appropriate, including continued improvement in this area in the work plan.

***Administrative Review Committee Hearings*** — Administrative Review Committee (ARC) hearings are opportunities for utility bureau customers to request a review of whether bureau

administrative rules were applied to their situation appropriately and fairly. In FY 2021-22 PUB members participated in ten ARC hearings for a total of approximately 30 hours, not counting prep time. This donated time and expertise contributes greatly to the City's work. The participating PUB member is the only non-bureau staff on the review committees. Because PUB members have a community perspective and are also familiar with the bureaus' constraints, they are uniquely positioned to ensure equitable outcomes in ARC proceedings, to see opportunities for ARC process improvement, and to make connections to larger policy issues. Past PUB ARC participants have identified the need for an in-depth equity analysis of the ARC process, e.g., demographic trends in who is accessing ARC and in ARC decisions, equity of long-term outcomes, and clearer understanding of the purpose and goals of the PUB's participation.

## Communications with City Council

In the fall the Board provided written and oral testimony in support of increased funding for the Portland Harbor Community Grant Program. In the winter and spring, the Board provided written input on the bureaus' requested budgets and participated in the budget work session. In deference to the Mayor and Commissioner-in-Charge's needs the annual discussion between the Board and Mayor related to the proposed budget was cancelled.

Typically, the Board has a fall work session with City Council. In consultation with the Mayor and the Commissioner-in-Charge, the Board opted to suspend the fall 2021 work session. Working with both offices, the Board is actively planning for a robust work session in the winter of 2022. The Board looks forward to the upcoming session with Council. The PUB is excited to bring to the discussion its FY 2021-22 policy work and looks forward to hearing from the Commissioner-in-Charge and Council about their priorities and potential opportunities for collaborative work.

## Conclusion

The Board expects this to be another busy year with continued focus on the policy work begun in FY 2021-22 as well as attention to the comprehensive rate study and large capital projects such as the Columbia Boulevard Wastewater Treatment Secondary Treatment Expansion Program— Capital Improvement Project (CBWTP STEP-CIP) and Tryon Creek Facility. With increased opportunity for gathering in-person the Board looks forward to conversation and relationship building in ways that spark collaboration between the Board, the bureaus, the Commissioner-in-Charge, and Council to address emerging challenges and improve programs, operations, and services in ways that equitably serve Portland communities

## Appendix A

### FY 2021-22 Recommendations on Billing, Debt Recovery, and Financial Assistance Programs

## **FY 2021-22 Recommendations on Billing, Debt Recovery, and Financial Assistance Programs**

The following recommendations were adopted by the PUB over a series of meetings from December 16, 2021 through May 19, 2022, including during the development of budget recommendations.

For additional context see the meeting minutes from December 16, 2021; April 21, 2022; May 3, 2022; and May 19, 2022.

### ***General values statements***

- Approach customers with compassion and thinking the best of them. Assume that if they aren't paying, it is because they are struggling financially.
- Design billing, collections, and financial assistance programs so those most vulnerable are centered, e.g., at each design decision point ask: How will this benefit or burden those who are made most vulnerable due to structural inequities?
- Provide information in multiple languages. Actively, not just passively, offer translation and interpretation support for all communications.
- Balance the values of writing off debt, of not increasing rates, of providing same/increased levels of service, and of continuing with planned capital improvements on schedule.
- Recognize that many BIPOC folks and others who have been marginalized by government have good reason not to trust government and may not ask for help or admit they can't pay a bill. Build this understanding into your approach in reaching out to customers. Take concrete, substantive actions to earn, build, and repair trust with BIPOC communities.
- Collaboration between BES, PWB, other City bureaus, agencies, and cross sector is a high priority for the Board.
- The Board supports increased FTE, as needed, to implement these recommendations.

### ***Big Picture/Innovation***

- Explore alternative funding sources and models for providing basic water, sewer, and stormwater services.
- Explore the possibility of a tiered rate system, beyond an opt-in financial assistance program.

### ***Initial steps***

- BES should become an active and visible partner to PWB in making debt recovery decisions. Financial teams from both bureaus should concurrently provide information on financial impacts and limitations to the debt collections process.
- Both bureaus should develop forecasting/basic scenario modeling regarding potential impacts to rates, services, and capital projects, e.g., if x% of the customer debt is not

recovered. The modeling might include examples of if the rates absorbed all debt or if there was a balance between rates, services, and capital projects absorbing the debt. This modeling/forecasting will provide concrete context to help decision-makers, e.g., Council and the PUB, better understand the situation and the options as well as assist in making recommendations.

### ***Billing and Collections (Debt Recovery)***

#### **Billing and Reminder Notices**

- Word and design reminder notices so they feel as little punitive as possible while still getting the information across.
- Explore additional marketing around the monthly billing option, especially culturally responsive marketing and marketing in additional languages.
- Explore the possibility of allowing customers to make an optional donation with their bill that could go to those who cannot pay, much as private utilities do.
- Explore ways to remove, reduce, and/or more equitably distribute late and penalty fees, centering those most impacted by structural inequities. For example, sliding scale fees; equity-based re-evaluation of public versus private collection processes; and ensuring that moving to monthly billing will not increase the late fees.
- Continue to allow for an extended period during which customers can pay their past due bill. Continue to authorize frontline staff to extend the payment period for up to a year and for there to be an accessible and equitable process by which a customer can be granted an even longer payback period.

#### **Collections**

- Take a whole person approach. Collection activities should not cause people who cannot pay to lose their housing. When individuals and families lose housing, it comes at immense costs to them and communities overall. Long-term costs may/often outweigh short-term revenue gain.
- Collection efforts should be focused on those who can pay.
- Ensure collections processes are not harming small businesses.

#### **Debt Forgiveness**

- Given that the pandemic and economic situation is unique and created for many people a situation-specific crisis, explore with City attorneys and City debt managers the possibility of offering debt forgiveness and relief within the current covenant restrictions beyond what is currently available through the “safety net program”, ARC, and/or financial assistance.
- Take lessons learned from this experience when working with lenders to develop future bond covenants in order to build in additional flexibility where possible.



## **Water shut-off for non-payment**

The topic of shutting off water for non-payment generated much Board discussion. Please see the May 19, 2022 minutes for the full richness of the Board's discussion and the multiple facets considered.

**Note:** At the time this recommendation was developed shut-offs for business customers were in the process of being reinstated and there was still a moratorium on residential customer shut-offs. Thus, shut-offs for business customers was a primary focus of discussion. As things continue to evolve, it is the issue of water shut-offs for nonpayment may be a topic the Board returns to.

The Board agrees with the Bureau's policy of using water shut-off, if used at all, as an absolute last resort for bill non-payment. In moving away from using water shut-offs the Board recommends:

- The threshold for water shut-off for commercial accounts be responsive to the needs of small businesses and be set to incentivize payment while not overburdening the business with increasing, excessive debt;
- A continued focus on communications with increased support for more languages, consideration of when a non-written communication format might be most effective, and consideration of issues of frequency, accessibility, and cultural responsiveness in communications;
- The processes and procedures remain focused on assisting people in paying their bills.

## ***Financial Assistance Programs***

### **General**

- The PUB supports PWB's plans to review the residential bill discount program and crisis vouchers to align with equity goals during FY 2022-23.
- Shift to see opportunity instead of challenge in financial assistance. Some FY 2020-21 BES financial forecast documents frame the expansion of the low-income assistance programs as a "medium risk" to the forecast for the potential future impact on rates. While that is reasonable for financial planning, the PUB encourages both bureaus to also look at the need for increased low-income assistance as an opportunity. For example, a goal to expand financial assistance could promote exploration of more equitable funding models, pursuit of state and federal grants, and investments in culturally responsive outreach and engagement.

### **Expand financial assistance offered to renters**

- Estimate the scope of the issue: Assess how many renters are paying their utility bill indirectly through rent and, if not but for that fact, i.e., if they were paying directly, they would qualify for financial assistance.

- Continue and improve the existing innovative Home Forward-STRA partnership for providing assistance to those who pay their utilities indirectly through rent. In addition, explore options beyond the Home Forward-STRA partnership that address the acknowledged limitations of tying financial assistance to case management.
- Strategies for offering assistance to renters who pay their utility bills indirectly through rent should strive to avoid creating or replicating inequities, e.g., currently a renter in the Home Forward-STRA program must be at risk of eviction to qualify for the financial assistance but a residential homeowner does not have to be at that same threshold.
- The Board is supportive of Commissioner Mapps' office's interest and efforts to expand assistance to renters and welcomes collaboration with the bureaus, the Commissioner-in-Charge of utilities, and Council in these efforts.

#### **Outreach for financial assistance programs**

- Expand the number of languages information is available in and expand the way information is provided, e.g., use of video in addition to written formats.
- Explore the possibility of including more extensive information on financial assistance programs, not just in the newsletter but also in bills, bill reminders, and other venues.
- Focus on building trust and relationship. Work with trusted community partners, e.g., the CEL program or community-based organizations, to get the word out about financial assistance programs.

#### **Funding support for financial assistance programs**

- The Board encourages the exploration of alternative means to fund low-income assistance besides rate increases, such as federal and state assistance and grants.
- The PUB supported the requests for ARPA grant funds by the utilities, including the \$2.6 million support already received for bill credits for low-income customers with accounts in arrears in the first round of relief. (See FY 2021-22 budget recommendation letter in Appendix D.)
- The Board also recommended another round of the Small Business Program for Utility Relief (SPUR). (See FY 2021-22 budget recommendation letter in Appendix D.)
- The Board supports more funding for the AFLOAT and Match programs along with additional targeted outreach so it is more widely known they exist.

## Appendix B

### FY 2021-22 Lead Hazard Reduction Program Recommendations

Following is the memo sent to the PUB from Board member Julia DeGraw with initial Lead Hazard Reduction Program recommendations. It was discussed at the PUB's May 19, 2022 meeting. Following the memo are the amended recommendations the Board adopted at the May 19, 2022 meeting.

## **Memo discussed by the Board at their May 19, 2022 meeting**

From: Julia DeGraw

DATE: updated May 11, 2022

Re: Recommendations regarding lead from Board member Julia DeGraw for the PUB's consideration

### **Background**

First off, I want to affirm that there is no safe level of lead exposure, whether it's from water, paint dust, children's toys, or particulates from burning diesel. In Portland there is no significant level of lead in the public water system leading all the way to people's homes, as the City does not have lead in the infrastructure (the pipes, etc.) that bring water to our homes. Unfortunately, the exposure to lead in water in Portland comes from some 10% of buildings that still have lead soldering and copper pipes. Since Bull Run water is naturally highly corrosive (lots of minerals) this means that more lead is able to leach into drinking water as it stagnates in the pipes in people's homes. The Water Bureau has recommendations for what to do about this, including flushing pipes for two minutes before drinking or cooking, or investing in a water filter system and regularly changing the filters as needed. For more information see: Portland Water Bureau's [The facts about lead in drinking water in Portland](#)

All this information begs the question: what can Portland do to better address the lead issue both in drinking water and more broadly?

The below draft recommendations are offered as a way to jump-start PUB's conversation about how we can better address issues of lead. These recommendations are not ones that could be funded from rate payer dollars and might likely involve, as key partners, entities beyond the two utility bureaus. However, since one of PUB's general responsibilities is to make recommendations to Council on matters related to the work of the utility bureaus and issues of lead intersect, it seems appropriate to make such recommendations along the lines of what I offer below—that is, if we are interested as a Board in taking such action. With that, I look forward to discussing these issues and draft recommendations with the Board.

### **Recommendation – Secure ongoing funding for the Lead Hazard Reduction Program**

**The City should secure new (and possibly additional) funding for the Lead Hazard Reduction Program which is currently slated to end once the Improved Corrosion Control Treatment Project (ICCT) comes online.**

The [Lead Hazard Reduction Program](#) was put into place in 1997 to comply with the new federal standards for lead exposure in drinking water. Despite coming into existence to address the lead in drinking water issue, the program also addresses other sources of lead exposure. However, the program is anticipated to end on June 30, 2023, a year after the [Improved Corrosion Control Treatment Project](#) comes online in 2022.

Currently, the Lead Hazard Reduction Program receives \$395,000 annually from rate payer funds in order to enter into intergovernmental agreements and grants with community partners to educate Portland's many communities about the dangers of lead, and to help households with lead issues safely

address those issues. This program is administered through the Water Bureau even though it addresses lead from any source. Additionally, the Lead Hazard Reduction Program funding is used as matching funding for the Portland Housing Bureau's Lead Hazard Control Program, which receives about \$1 million per year from the federal government to remove lead paint hazards from low-income homes.

Given the fact that lead soldering still exists in approximately 10% of Portland homes, and that many in our communities are exposed to dangerous lead exposure from paint and potentially other sources, the PUB could recommend to the City of Portland to make this program permanent in the City's general funds budget until and if all sources of lead have been addressed, and increase its funding. The community grant program should continue to be funded at no lower than the current \$395,000 budget. If not funded, the Portland Housing Bureau is at risk of losing the annual \$1 million federal grant funds. Any loss of matching federal funding should be made up for.

The increased resources should be used in part to better reach out to and educate immigrant communities where English is not their primary language, about sources of lead in their environment and how to address any elevated levels of lead. Overall, the Water Bureau and the city need to make resources more available to communities of color and immigrant communities that are often disproportionately impacted by environmental hazards, like exposure to lead (from any source).

PUB can also recommend that the City of Portland continue partnering with Multnomah County to better fund and expand the program. This could set a standard for how the State of Oregon could better address lead issues. The County focuses on public health issues and on assisting/providing a safety net for those most vulnerable among us; and the County covers a broader geographic location than the City. Partnering with the County means offering these crucial services to more people and being able to tap into additional resources from the County; potentially leading to a more strategic and efficient way to address lead issues for the region.

### **Recommendation – assist low-income families in removing lead from their homes**

#### **The City should fund a program to assist low-income families in removing lead from their homes.**

The Water Bureau anticipates a significant reduction in lead levels with the new drinking water treatment. However, longer term, we should consider recommending to the City that it fund a program to help low-income families replace the plumbing in their home with a program similar to how Multnomah County and eventually the State helped address weatherization through low to no interest loans and public private partnerships. Considering that the main source of lead poisoning in the Portland Metro Region is from paint, the program could have lead paint remediation grants and loans as well. These are expensive problems for individual households to bear, and it should be the role of the public sector to help families access the resources they need to live in lead-free environments.

The City should ensure that renters also benefit from lead plumbing replacements and lead removal in ways that center renters, ensuring they benefit the most from and are protected from any potential or unintended harm from efforts made to encourage landlords to replace lead plumbing. In addition to addressing the lead in water issues for renters, the City needs to find better enforcement methods for landlords who are not adequately addressing lead paint as well. The PUB can recommend that the city explore working across bureaus, and partnering with Multnomah County and potentially other



jurisdictions, such as Metro, to address lead poisoning in a more systematic and holistic way—with a commitment to equity and justice, and to provide the needed resources necessary to finally address unhealthy exposure to lead in all of our communities.

### **Recommendation – Collaborate and Communicate with Commissioner Mapps' office**

**I recommend PUB regularly communicate and collaborate with Commissioner Mapps' office on issues related to lead, with a focus on plumbing, with the goal of strengthening our lead abatement programs.**

As I was working on this memo, I learned that Commissioner Mapps has also prioritized these issues. He and his office are trying to find innovative ways to address them. They are in the early stages of this work to address all sources of lead exposure and I recommend we stay in communication with them so we can work in concert to develop and advocate for equitable solutions. PUB's feedback, proposals for additional consideration, and advocacy where we agree upon objectives/approaches can amplify the efforts.

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#### **Amended recommendations adopted by the Board at the May 19, 2022 meeting**

- The City should secure new (and possibly additional) funding for the Lead Hazard Reduction Program which is currently slated to end once the Improved Corrosion Control Treatment Project (ICCT) comes fully online and is proven to be effective (approximately one year into the project).
- The City should fund a program to assist all households in removing lead from their homes. The program might include low/no interest loans with grant funding for low-income households.
  - As a first step, the City should resource a team to develop proposals for a public-private partnership program that includes (i) the funding needed, (ii) projections on the number of families (including the number of children) assisted; and (iii) options for no/low interest loans (for everyone) and potentially grants to the lowest income families. The program should address all sources of lead in homes and involve an aggressive timeline and aggressive reductions in lead levels.
- PUB should regularly communicate and collaborate with Commissioner Mapps' office on issues related to lead, with a focus on plumbing, with the goal of strengthening the lead abatement programs.

## Appendix C

# Workplace Racial Equity Mid-Pandemic Report

Following is the report compiled and presented by the PUB project team and discussed by the Board. The Board accepted and fully endorsed the report and recommendations at the June 7, 2022 meeting, and further discussing next steps at the June 16, 2022 meeting. Report is available online at:

<https://www.portland.gov/sites/default/files/2022/bespwbworkforceraciaequityreport2022-5-31-22-compiled-revc.pdf>

# **Workplace Racial Equity Mid-Pandemic:**

**Report focused on the Bureau of  
Environmental Services (BES) and  
the Portland Water Bureau (PWB)**

**A report to PUB submitted by  
Karen Y. Spencer and Theresa Huang**

**May 31, 2022**

*There is a door knob glowing like chance before you.  
Grab it, turn and pull, step through, back straight, chin up, eyes open, hearts loud.  
Walk through this with me.  
Walk through this with me.*

- Anis Mojgani, Oregon Poet Laureate, 'Come Closer'

## Introduction

The Portland Utility Board serves as an advisory body to City Council, on behalf of and for the benefit of the people of Portland concerning the Portland Water Bureau and the Bureau of Environmental Services. In addition to its financial oversight role, PUB is charged with identifying and reporting on important issues and challenges that these Bureaus face. Addressing the disparities Black, Indigenous, people of color (BIPOC) staff experience in hiring, retention, and promotion at the City is a high priority policy item for PUB and is explicitly discussed in [PUB's FY 2021-2022 annual report and work plan](#).

In the summer of 2021, one of the voting members of the Board, Karen Y. Spencer, sent a memo to the Board expressing an interest in taking on a particularly timely issue. In that memo she shared:



*PUB Members, as I talk to friends and colleagues of color in Oregon and around the globe, I cannot recall conversing with one person of color who wishes to return to the office as it was constructed before the pandemic. Most seem to be playing along with the idea though, rather than raising their legitimate concerns. Even more troubling, when I talk to leaders and managers, I don't hear an awareness of or an urgency to tackle this issue. While I have not spoken with any Bureau employees on this subject, I am concerned that this workplace concern may not percolate up to Bureau leadership.*

*Before remote workers return to their in-office environment, there is a golden opportunity to make real progress by hitting a reset button on office culture. If we don't think about it now before everyone is in the office, we will have missed a once in a lifetime opportunity to reduce the impact of racial trauma at a critical moment for our communities of color. I look forward to hearing more about these concerns from the Bureaus. I hope that efforts on tackling microaggressions will improve the work environment for both remote and on-site workers.*

*Looking beyond the immediate need to reduce potential trauma amid a traumatic pandemic, Oregon's workforce is going to change dramatically over the next ten years, becoming increasingly diverse. The new generation coming into the*



*workforce will not remain in Portland or this state, if they are not valued and respected and do not have a voice at the table in leadership roles. Taking a golden opportunity to get this right now is a worthwhile long-term investment.*

To jump-start this work two Board members, Theresa Huang and Karen Y. Spencer, formed a team to collect available information and summarize findings, remaining questions, and observations into a set of suggestions for the Board's consideration. Unsurprisingly, this work daylighted related workforce issues that impact the opportunities and experiences BIPOC staff have at the City. This is very much a starting-place summary of findings and suggestions. There is much more work to be done.

For purposes of this report, we adopt PWB's definition of Workforce equity from its *Plan to Advance Equity, Diversity and Inclusion*:

Workforce equity: Creating the conditions for all employees to have access to the resources and opportunities they need to thrive, so their identities do not predict their employment outcomes.

"The very serious function of racism is distraction. It keeps you from doing your work. It keeps you explaining, over and over again, your reason for being." - Toni Morrison

This report is written in the context of being in our third year of the coronavirus pandemic with over 1,000,000 deaths nationwide, which will have incalculable and lasting reverberations.<sup>1</sup> The pandemic has not impacted all populations equally. Cumulative data shows disparities in cases and deaths for people of color nationally<sup>2</sup> and statewide.<sup>3</sup> This report is also written against the backdrop that two years after the murder of George Floyd,<sup>4</sup> our communities of

<sup>1</sup> *What One Million COVID Dead Mean for the U.S.'s Future*,  
<https://www.scientificamerican.com/article/what-one-million-covid-dead-mean-for-the-u-s-s-future/>

<sup>2</sup> *COVID-19 Cases and Deaths by Race/Ethnicity: Current Data and Changes Over Time*,  
<https://www.kff.org/racial-equity-and-health-policy/issue-brief/covid-19-cases-and-deaths-by-race-ethnicity-current-data-and-changes-over-time/>

<sup>3</sup> *Oregon COVID-19 Case Demographics and Disease Severity Statewide* (Oregon Health Authority),  
<https://public.tableau.com/app/profile/oregon.health.authority.covid.19/viz/OregonCOVID-19CaseDemographicsandDiseaseSeverityStatewide/SeverityTrendsDeath>

<sup>4</sup> *Two Years After George Floyd's Murder, Minneapolis Is Still Struggling to Redefine Policing*,  
<https://time.com/6180605/minneapolis-police-reform-george-floyd-murder/>

color are facing the mainstreaming of racist rhetoric<sup>5</sup> and a marked rise in hate crimes,<sup>6</sup> including domestic terrorism.<sup>7</sup>

Pretending this backdrop does not exist without any change in City policies, procedures, or Bureau organizational cultures asks BIPOC employees to be equally productive with their peers in their work for the Bureaus, while carrying the extra burdens of racialized trauma. Both generalized racial trauma and individual experiences with racism thus produces an unlevel competitive field in the workplace. While we cannot immediately level the playing field, acknowledging pain and suffering goes a long way toward identifying the issues and building solutions. Acknowledging pain or suffering in others is humanizing and makes employees feel that they are seen, heard, and valued. Employees that feel valued are more engaged and more productive with their work.<sup>8</sup> Failing to acknowledge pain or suffering is dehumanizing and renders them invisible.<sup>9</sup> With a goal of ensuring that BIPOC employees are seen, heard, and valued, we have written this report keeping the PUB's *Beliefs, Values and Anti-Racist Principles* in mind, especially the belief that "A failure to address policies that continue to drive racial inequities is a form of racism."<sup>10</sup>

## **Sources**

A variety of resources were consulted in developing this report. The PUB team reached out to neighboring jurisdictions, e.g., City of Seattle, King County, Multnomah County, Washington County, Clackamas County, and Metro. The team reviewed workforce surveys and reports conducted by the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB) as well as some City-wide work in progress and reports related to the workforce and workplace environment. The team also had conversations with City staff, including staff who had been involved in City-wide workforce racial equity efforts convened by the Office of Equity and Human Rights (OEHR) and the Bureau of Human Resources (BHR); BHR staff; and Equity

<sup>5</sup> *The 'great replacement' conspiracy theory isn't fringe anymore, it's mainstream*, <https://www.npr.org/2022/05/17/1099233034/the-great-replacement-conspiracy-theory-isnt-fringe-anymore-its-mainstream>

<sup>6</sup> *Report: Hate crimes rose 44% last year in study of major cities*, <https://www.ny1.com/nyc/all-boroughs/news/2022/02/14/hate-crime-increase-2021-asian-american->

<sup>7</sup> *Biden calls Buffalo shooting 'domestic terrorism'*, <https://www.wjbf.com/news/u-s-world-news/biden-to-meet-with-buffalo-mass-shooting-victims-families/>

<sup>8</sup> Portland Water Bureau, *Engagement Profile*, July 2010 (page 24).

<sup>9</sup> "I am invisible, simply because people refuse to see me." Ralph Ellison, *Invisible Man* (1952).

<sup>10</sup> *Portland Utility Board Beliefs, Values and Anti-Racist Principles*, <https://www.portland.gov/sites/default/files/2022/pub-values-adopted-2-1-22.pdf>

Managers from BES, PWB, and the Office of Management and Finance (OMF). A list of written resources consulted can be found at the end of the report.

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## *Themes*

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While the issues intertwine in complex ways, for ease of review, the findings have been organized into the following thematic areas:

- [Disaggregate data by race and ethnicity, analyze, and act on it](#)
- [Collect and use qualitative data; Incorporate community knowledge as data](#)
- [Apply an equity lens to the temporary employee experience and act on findings](#)
- [Analyze and address racial disparities in career trajectory](#)
- [Use return to office to level set culture and workforce environment expectations](#)

To navigate, click the links and theme titles to toggle between themes.

As you review this report, we ask you to keep in mind these questions:

- Are our BIPOC employees seen, heard, and valued, especially during times of change or transition?
- Can I add my voice as an amplifier for the needs of our BIPOC employees?
- Is there a suggestion I would add to this list?
- What projects should be appropriately funded to promote workforce racial equity?

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## *Disaggregate data by race and ethnicity, analyze, and act on it*

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### **Findings**

For both Bureaus there was an overwhelming lack of available data disaggregated by race and ethnicity.

**BES** — The formal reports shared by BES with the PUB team, e.g., the BES employee engagement surveys, exit interviews, and pandemic related surveys, did not include information disaggregated by race and ethnicity. For example, in the BES exit interview summaries (February 2017 to January 2022)<sup>11</sup> Eighty-seven of the 122 survey respondents (71.31%) identified as white (pg. 1), four respondents chose not to answer this question. Thus,

<sup>11</sup> Likewise, while PWB does offer optional confidential exit surveys, the data is also not disaggregated by race and ethnicity.

at most 25.40% to 28.69% were BIPOC staff. Without data disaggregation, the experiences of exiting BIPOC staffs are overshadowed and we cannot grasp what the true experience is working at the Bureau as a BIPOC staff. We have no idea *who* left to advance their career, *who* left because they feel inequitable treatment from their supervisor, *who* would return to work at BES, or *who* was satisfied or dissatisfied with the work environment and in what ways. Importantly, while a particular response to a question may be a small percentage of the overall responses to that question, that small percentage, if representing largely BIPOC staff, may nonetheless be quite significant. For example, 8% of respondents said they would not recommend employment with BES to a friend or family member with 18% undecided as compared to 75% saying they would. Depending on *who* makes up that 8% and 18% this could be quite significant in terms of illuminating the experience of BIPOC staff in the workplace. (exit interviews pg. 5)

The BES “workforce development and culture” survey shared with the PUB team also did not disaggregate by race and ethnicity the responses to individual questions. As shared with the PUB team, the two BES surveys conducted regarding the pandemic did not include any demographic information about the respondents. It seems the opportunity to identify and address racial disparities in the workplace environment and work experiences, was entirely missed.

Notably, in the recent Columbia Boulevard Wastewater Treatment Plant (CBWTP) Needs Assessment, Stantec identified that “staff believe there is a lack of attentiveness to equity issues and concerns.” One of the short-term calls to action was to “Create process that tracks an issue when it is raised.”<sup>12</sup> (pg. 8)

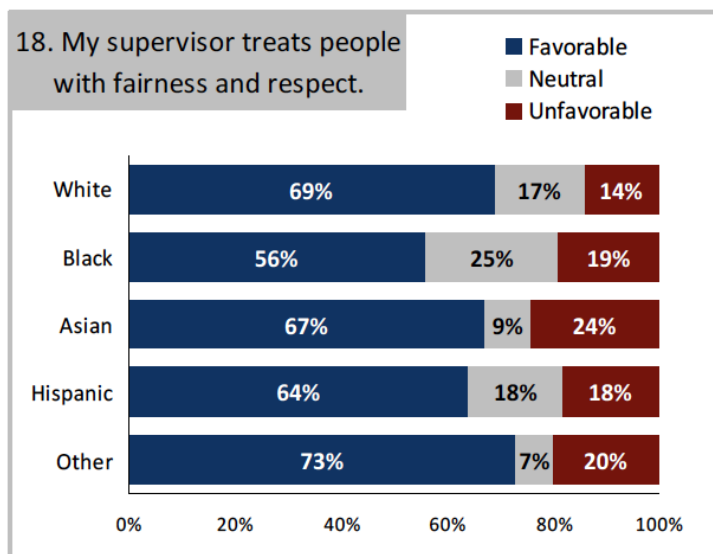


Figure 1 - Engagement Profile, Portland Water Bureau, July 2010  
(Page 13)

**PWB** — PWB survey data was similarly largely not disaggregated by race and ethnicity. Only one engagement survey provided data that was disaggregated by race, the Engagement Profile, July 2010. That study, for instance, showed that the black population gave significantly lower scores in the ‘Supervisor’ dimension (Figure 1).

<sup>12</sup> While outside of the scope of this report, we note our alarm and dismay that one of the first Calls to Action for Equity was to “secure the women's changing rooms/showering facilities.”

Additionally, the smallest minority groups represented by the Hispanic and “Other” populations felt they were not given the necessary level of authority to do their best work. (Figure 2).

Follow-on surveys did not disaggregate the data. So, there is no way of knowing whether these dynamics have been properly addressed over time, and/or whether new issues have cropped up.

A survey was conducted in 2021, but we were not made privy to the complete results. We were provided with these pieces of information:

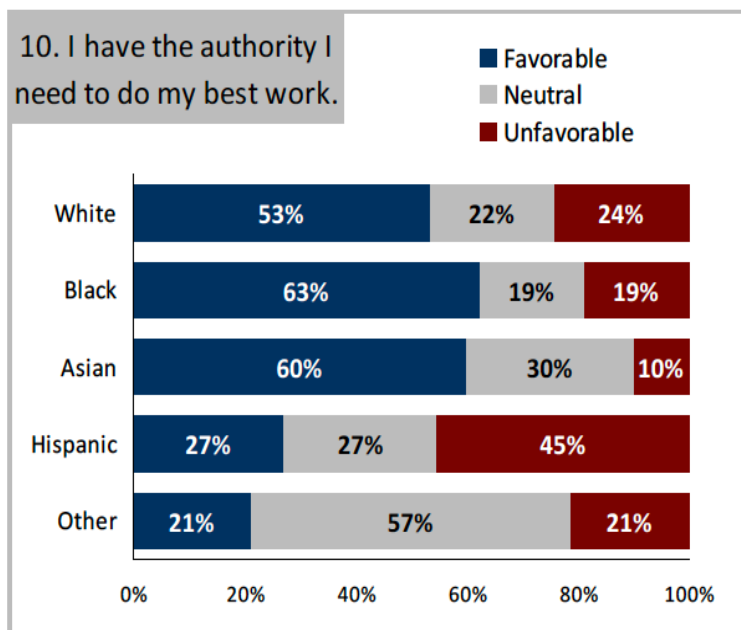


Figure 2- Engagement Profile, Portland Water Bureau, July 2010  
(Page 13)

- Seventy-three percent of employees, regardless of race, gender, ability and sexual orientation, said they were satisfied with and engaged with their jobs. The disaggregated details are:

	All	White	BIPOC	Women	Sexual Orientation	TNGC	Ability Status
Overall, I am satisfied with my job	73%	75%	72%	70%	60%	80%	61%

- 80% BIPOC feel work is engaging, but 56% say it isn't valued.
- 73% employees say their work is engaging to them most of the time, and 73% of workforce is satisfied with their job.
- 36% of employees with disabilities are satisfied with their jobs.<sup>13</sup>

*56% of BIPOC employees feeling that their work is undervalued is a shocking data point. It would be helpful to understand whether this is felt by all racial group populations or concentrated among certain populations. Nonetheless, it does signal the need for action on workplace culture.*

<sup>13</sup> While outside of the scope of this report, we do wish to acknowledge the extremely low satisfaction rate for employees with disabilities which should be investigated and addressed by PWB.

**Summary, both Bureaus** — This data raises more questions than it resolves. The lack of disaggregated racial and ethnic data made it impossible for the PUB team to analyze survey results through a lens of racial equity. If that disaggregation and analysis has happened within the Bureaus, the PUB team was not made aware of it. When data is lumped together, it can make the experiences of certain populations invisible. This invisibility has impacts. For leaders, it creates blind spots and prevents them from addressing the needs and opportunities of those populations. Employees may not feel seen or heard, especially those whose day-to-day work experience significantly differs from the norm or average of all employees. It may also send a signal that the organization does not care about that employee population, leading to disengagement and potential difficulties in recruitment and retention.

Collection and analysis of workforce survey data disaggregated by race and ethnicity must happen. This allows the Bureaus to directly incorporate the experiences and expertise of BIPOC staff into efforts to improve workforce culture and career opportunities for BIPOC staff. Finally, by failing to disaggregate racial and ethnic data and report on it, these survey summaries replicate the all-too-common lived experience of BIPOC people — being made invisible by the white experience, thereby, continuing the harm of erasure.

“I don’t study to know more, but to ignore less.”

– Juana Inés de la Cruz

### **Suggestions**

- **Need for Creativity.** The PUB team understands the need to protect individuals’ identities and that, given the overall small percentage of BIPOC staff, disaggregating the data by race and ethnicity in workforce surveys and exit interviews can run the risk of individuals becoming identifiable. There are also legitimate concerns about the data being used to harm BIPOC communities and care should be taken to avoid this harm.<sup>14</sup> Nonetheless, there is a need to creatively think about ways to disaggregate the data and publicly report on it. Otherwise, one runs the risk of refusing to ask the hard racial equity questions by hiding behind one of the key issues workforce racial equity is meant to address: the too small numbers of BIPOC staff in the Bureaus’ workforce. This suggestion is consistent with PWB’s recognition that “achieving equity requires

<sup>14</sup> Harm can be done in any number of ways, e.g., by using the data to blame a population for the systemic issues they experience (pathologizing the population) or by generalizing on the basis of imperfect data. Addition of this point credited to personal communications with Equity Managers. See also *Weaponized data: How the obsessions with data has been hurting marginalized communities*, by Vu Le. <https://nonprofitaf.com/2015/05/weaponized-data-how-the-obsession-with-data-has-been-hurting-marginalized-communities/>

intentionally examining policies and practices as well as reallocating resources.” (PWB Plan to Advance Equity, Diversity, and Inclusion, pg. 12)

- **Put racial equity front and center** in the decision-making and design of all workforce related surveys and data collection. For example, ask questions specific to BIPOC staff, e.g., As a BIPOC staff, what would make you want to stay at the Bureau? Or, as a BIPOC staff, what is a dealbreaker for you?
- **Disaggregate data by race and ethnicity in all workforce surveys**, for example, employee engagement, exit interviews, and any surveys responding to emerging needs, e.g., the surveys related to the pandemic and workforce safety needs, re-entry needs, etc.
- **Consider multi-layer analysis, factoring in demographic identities as well as job classification and department/service area.** Given the historical and continuing occupational segregation in the USA and the fact that often occupations with a higher percentage of BIPOC workers are deemed by society as less valuable and thus paid less, resourced less, and offered less opportunity for career change or advancement, a multi-layer analysis in future surveys may be illuminating of deeper organizational-level structural inequities. As an example, the CBWTP Needs Assessment, recommends that BES “[o]ffer operator-in-training path for disadvantaged persons and underprivileged communities.” (pg. 8)
- **City-wide consistent exit and stay surveys.** As suggested by the Subgroup #2: Retention, led by Dr. Koffi Dessou + Aly’ce Brannon-Reid, “Develop consistent Exit and Stay surveys. Focus on BIPOC staff. Share exit/stay interview data across Bureaus so we can all benefit from the information and develop a process for using this data to inform recruitment and retention.”
- **Include the overlay of racial and ethnic demographic data in the final reports shared with staff, Council, PUB, and the public.** Do so in visual ways that are easy for the reader to understand.
- **Use proxy information when disaggregated data specific to the Bureaus is not available.** A lack of disaggregated data should never be viewed as a stumbling block. When disaggregated data cannot be obtained, the Bureaus should be mindful of including proxy data such as information through their affinity networks and surveys and benchmarks based on regional, national, or comparable city data. So that BIPOC staff feel seen, this proxy data should be referenced or acknowledged in reports that contain only aggregated data.
- **Act on the results.** Where the disaggregated data shows issues, develop plans to address and then take swift action to address the issues. When survey results highlight a significant disparity in perception among a discrete population of the employee base, it should be treated as a business issue by Bureau leadership.



## **Findings**

**BES** – Qualitative data appears to have been collected to some degree in the BES exit interviews, workforce development survey, and pandemic-related re-entry surveys, but it was largely not shared with the PUB team. We do not know if or how it was analyzed, incorporated, or acted upon.

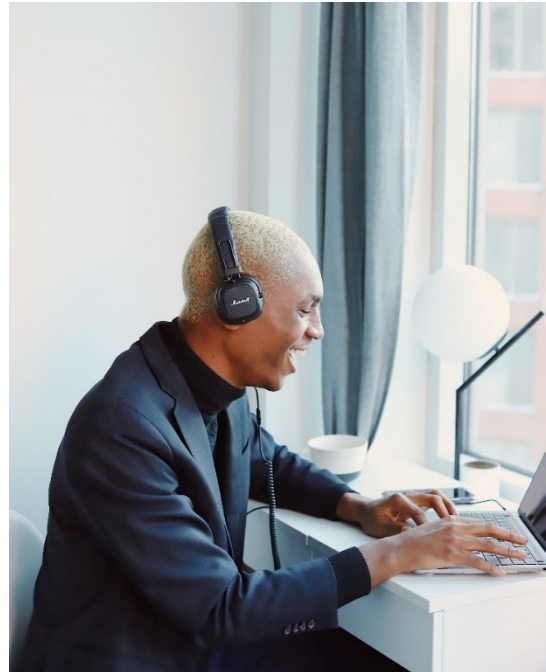
While numbers can tell a story or paint a picture of larger trends, e.g., who gets promoted, who leaves the Bureau for what check-the-box reason; it is most often the details behind the checkboxes and answers to open-ended qualitative questions that best illuminate the facets of complex equity issues. This information can daylight concerns and suggest solutions that may remain unseen until narratively investigated. For example, 13.16% of respondents to the BES exit interview question 14 chose the option

“fair and equitable treatment” by their direct manager/supervisor as a factor in their departure, which was significantly higher than the other options, and 10.53% reported being “extremely dissatisfied.” (pg. 14) Providing the space for people to explain why they selected these options, can shed light that checkboxes cannot.

43.81% of respondents checked “other” in answer to the question “Did any of these additional factors affect your departure?”. (BES exit surveys, pp. 22-23) Without the qualitative information behind “other”, all that can be known is that there is valuable information missing. As discussed earlier, this information must also be disaggregated by race and ethnicity.

**PWB** – We are informed that the Water Bureau offers optional exit surveys. The information remains confidential and is not aggregated. According to the Bureau, they are used in the context of work groups with points of information used locally. Surveys are screened by PWB Business Operations staff. Concerns are flagged and shared with the Director. Further action is at the Director’s discretion. By maintaining individual data points, the Bureau may miss trends or issues within discrete populations.

We’re presuming that the data collected for these exit interviews includes some qualitative questions. We were not informed of any other areas in which the Water Bureau collects qualitative information.



## **Suggestions**

- **Make more use of open-ended qualitative questions in workforce surveys.** Even where you provide a checkbox list to assist the respondent and/or to allow for numerical analysis, where appropriate, the survey should invite the participant to expand on their checkbox choice in their own words. Analyze, incorporate, and act on the qualitative data collected. While it may be more difficult to collect and work with, qualitative data is essential to moving racial equity in the workforce forward. Share qualitative information with all levels of Bureau staff, Council, PUB, and the public in meaningful ways that also protect individual identities.
- **Incorporate community knowledge as data.** Community knowledge is often dismissed as “merely anecdotal”. The American English word has origins in the ancient Greek word for the things not written down. In contemporary usage it often carries the connotation of being less valuable information than other forms of information. Interrogating the over-valuation of certain kinds of written information and the devaluation of other kinds of information is part of the work of dismantling white supremacist culture.<sup>15</sup>

BIPOC communities develop and share community-level knowledge identifying issues, opportunities, and wisdom on how to navigate hostile environments and systemic racism. This knowledge may be communicated via stories, humor, pithy sayings, poetry, song, etc. Sometimes it is written down, other times it remains oral. Nonetheless, it is a valuable source of data and should be utilized. It adds depth and nuance to forms of data more commonly recognized by bureaucracies. And, when bureaucratic forms of data are lacking, community knowledge is often present. With this in mind, leadership should never accept or give as an excuse, “We didn’t act, because we didn’t know.”

Indeed, the origins of this report lie in talking with BIPOC friends and colleagues about the relief from workplace microaggressions that teleworking afforded as well as the desire not to return to the status quo office. While the impetus for the report came from a volunteer member of PUB, this community knowledge about the workforce racial equity issues was just as accessible to City and Bureau leadership within the ranks of their own employees. The open questions are:

- Why did leadership not seek out this knowledge?
- Why did BIPOC staff not feel empowered to convey this information?
- And, if this knowledge was sought and/or conveyed, why was it not valued?

Sometimes, being a leader means walking beside someone on their journey long enough to discover their struggles.

<sup>15</sup> *Worship of the Written Word*, <https://www.whitesupremacyculture.info/worship-of-written-word.html>

- **Act on the results.** Where the disaggregated data shows issues — whether that data is quantitative or qualitative and whether the source is City/Bureau specific or proxy data from other sources or community knowledge — develop plans to address and then take action to address the issues.

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## ***Apply an Equity Lens to the Temporary Employee Experience and Act on Findings***

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### **Introduction**

In analyzing the workforce surveys, it was not clear how or if temporary employees, including interns and apprentices, were included in the surveys. The team was not given any data on the potential racial equity issues related to use of temporary employees in the workforce, e.g., the experience of temporary employees in the work environment, and the career trajectories of temporary employees, including apprentices and interns, at the Bureaus. In this report, the PUB team shares some initial observations and preliminary suggestions. The team recommends further conversation with the Bureaus and information gathering, analysis, and action to address any concerning patterns.

The City often uses casual and seasonal employee classifications for temporary employees, sometimes even for ongoing needs that may not be temporary or seasonal in nature. Employees in these classifications can only work up to 1400 hours in a year and have extremely limited benefits and job security, despite significant contributions to the City. These employees may accrue limited sick leave, but do not accrue vacation, service credit or status in their classification, and can be terminated at any time without appeal rights. Certain benefits such as holiday pay or federal medical coverage may be available in limited circumstances.<sup>16</sup>

### **Findings**

Currently, there is an opportunity gap between the temporary positions and the entry level positions, especially those that are ongoing. People who are advancing from the temporary positions are often those with more resources for them to pursue jobs without stable pay/benefits (spending years in a temp position just to wait for a chance to get a permanent job), and better connections, etc. while many BIPOC community members don't have equal access to this pathway.<sup>17</sup>

<sup>16</sup> See: BHR 3.03 Administrative Rule: *Types of Appointments*

<https://www.portland.gov/sites/default/files/2020-06/3.03-types-of-appointments.pdf>

<sup>17</sup> The racial wealth gap has substantial impacts on both the individual and the local economy. McKinsey & Company estimates that "the wealth gap between American whites and Blacks is projected to cost the US economy between \$1 trillion and \$1.5 trillion in lost consumption and investment between 2019 and 2028. This translates to a projected GDP penalty of 4 to 6 percent in 2028 (Noel and others 2019)."

Addressing systemic racism is a moral imperative; it can also make economies stronger

<https://www.imf.org/Publications/fandd/issues/2020/09/the-economic-cost-of-racism-losavio> citing

Many current front facing positions that require close communication and relationship building with our communities are temporary and seasonal positions that do not have access to benefits. However, these positions are also very vital positions that maintain the relationships between the Bureaus and the community. In addition, BIPOC staff in these roles are also the ones holding extensive community expertise and knowledge regarding communication and relationship building with the most vulnerable people we serve. It is necessary that we take a close look at the structures of how the Bureaus interact with our communities. How we treat employees who connect with BIPOC communities on a day-to-day basis reflects how much or little we value these communities.

### **Suggestions**

Again, the PUB team did not have time to fully investigate the Bureaus' use of temporary employees. The Bureaus may already be doing some of the items suggested below. In this case the PUB team encourages the Board to support the Bureaus in those efforts. Where the below suggestions are not already happening, the PUB team encourages the Board to recommend that the Bureaus undertake them.

- **Value temporary staff** whether interns, apprentices, or other temporary staff, as people, for their skills, and for the work they do.
- **Analyze current practices and procedures** that explicitly or implicitly treat temporary staff as less than, question why, and make change.
- **Provide support and mentorship** so temporary staff can navigate the application process for ongoing positions.
- **Create more career pathways to on-going, benefitted positions for interns, apprentices, and other temporary employees** through mentorship, opportunities for leadership, and better benefits for temporary employees to sustain basic living needs.
- **Explicitly include interns, apprentices, seasonal, and other temporary staff in all workforce and workforce culture surveys.**
- **Do not brownwash.** Placing BIPOC employees in lower valued and lower paid positions to advertise that the organization is diverse and inclusive, while upper-level management roles continue to be filled with primarily white ethnicities, is one of the common ways of tokenizing and brownwashing. Take steps to ensure the Bureaus are not brownwashing:

<https://www.mckinsey.com/industries/public-and-social-sector/our-insights/the-economic-impact-of-closing-the-racial-wealth-gap#>

In a back of the envelop calculation presuming a 1.8% annual GDP growth for the Portland Metro region, this GDP penalty just for the White-Black gap could translate to \$7.7 Billion to \$11.6 Billion impact. Racial and ethnic inequality has cost US economy \$51 trillion since 1990.

<https://www.weforum.org/agenda/2021/09/racial-and-ethnic-inequality-has-cost-us-economy-51-trillion-since-1990/>

- Conduct multi-layer analysis including appointment status, job classification, and racial and ethnic demographic data to determine concerning patterns, e.g., who moves from temporary positions to ongoing positions; who is doing work in job classification X as a casual appointment and who is doing this work in an ongoing position; etc. Take action to address any discovered concerning patterns.
- This analysis should be done for intern, apprentice, and general casual employees to ensure the Bureaus are not replicating long-standing inequities such as disparately hiring BIPOC staff into temporary positions or disparately requiring that BIPOC staff “prove” their skills by starting as interns in situations where a comparably situated white staff would simply be hired into an ongoing position from the start.
- **Analyze the extent to which the Bureaus rely on temporary/casual staff and what kind of work is generally done by those staff.** Examine the underlying valuation of that work through a lens of racial equity and, as concerning patterns and practices are found, plan and implement changes. For example, to what extent are the Bureaus relying on temporary positions to do some of the most important community facing work? Regardless of whether the use of temporary staff seems significant or not, consider reducing this use. If staff are good enough to employ, they are good enough to pay a living wage and benefits.

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## ***Analyze and Address Racial Disparities in Career Trajectory***

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### **Introduction**

In reviewing the workforce surveys and data, the PUB team did not have time to significantly investigate general issues related to career trajectory. Below are some preliminary findings and suggestions.

### **Findings**

**City Wide** — Bureau of Human Resources (BHR) and Office of Equity and Human Rights (OEHR) staff are in the process of enhancing the internal-facing workforce Equity Manager’s Dashboard as well as the public-facing human resources dashboard. The public-facing dashboard can be found here: <https://www.portlandoregon.gov/bhr/article/697805>.

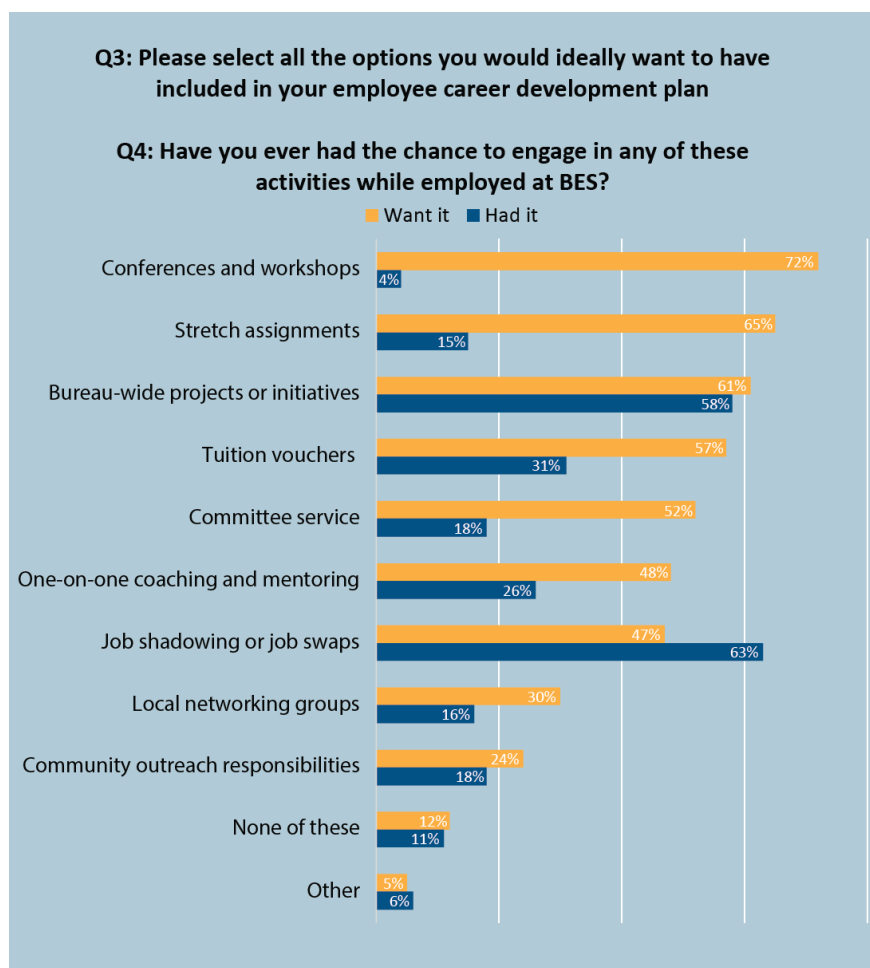
The PUB team met with BHR staff to review the internal Equity Manager’s dashboard. This dashboard primarily collects information related to the City’s affirmative action plan and reporting to the EEOC. It does not include qualitative data. There was not time for a comprehensive review, but the following dashboards were briefly viewed and discussed: promotion by race, average time to promotion by race, did not pass probation by race,

discipline rate by race, and discipline type by race. Data was available citywide, as well as by each utility bureau for the years from FY 2015-16 through FY 2020-21.

**BES** — In reviewing the BES “workforce development and culture” survey it seemed that staff felt there were a lack of opportunities and activities for career advancement. This can be easily identified in the difference in access to different types of staff support activities. For example, as shown in Figure 3 below:

- 65% of staff reported wanting stretch assignments with only 15% reporting having had a stretch assignment opportunity.
- 52% of staff reported interest in committee service with only 18% reporting having access to such an opportunity.
- And, while 48% of staff wanted a mentor, only 26% of them reporting having access.

*Figure 3 - BES Workforce Development and Culture Survey Results (Page 3)*



In general, it seemed staff reported having less access to career supports that offer more opportunity to advance in their career, e.g., stretch assignments, compared to supports that

represent less advancement opportunity, e.g., job shadowing (63% report access with 47% expressing interest).

We found that a significant portion of staff (73%) said they did not have plans to advance in the Bureau, with only about 1/3 of those staff having discussed their interests. (workforce survey, pg. 5) Due to lack of additional data, particularly qualitative data, we don't know why so many staff have no advancement plans. However, responses to questions from the BES exit survey suggest that this is partly attributed to the lack of upward mobility opportunities within the Bureau, in addition to dissatisfaction with the workplace culture.

In BES exit interview summaries, a significant percentage (38.10%) indicated job change/career advancement as a factor affecting their departure. This was second only to "other", which may contain related factors such as when temporary employees' jobs simply end (exit interviews, pp. 22-23). Similarly, "Opportunity for Advancement" (17.21%) and "Professional Development Opportunities" (9.73%) were the highest factors in departure noted in the development and recognition section of the survey (exit interviews, pp. 16-17). When asked about their direct manager or supervisor, while "Exhibit Leadership" received the most dissatisfaction ratings, "Fair and Equitable Treatment" and "Communication" received the most dissatisfaction that directly contributed as a factor to their departure (exit interviews, pg. 14).

As discussed earlier, without racially and ethnically disaggregated data we don't know *who* feels career advancement supports are unavailable, and *who* is leaving the job due to experiencing unfair and inequitable treatments. And, without the qualitative answers to *why* people responded to the survey the way they did, we lose illuminating nuance. We do know, however, that career advancement and development within the Bureau has become something unattainable, leaving many talented employees with no choice but to seek better work elsewhere.

**PWB** –The Water Bureau has identified a substantial issue with the pass rate from probation of Black employees.

In terms of probation, 12% of female Employees of Color did not pass probation, compared to 4% for female White employees. 9% of male Employees of Color did not pass probation, compared to 5% for male White employees. The bureau must address the issue of People of Color not passing probation at higher rates than their White peers. (May 18, 2021, *Response to City African American Network letter*).

These results only heighten the need to review the new 2021 engagement survey results.



“Tradition is a cage.”

– Tommy Pico, IRL

### **Suggestions**

Because the PUB team did not have time to fully investigate career trajectory issues, the below list of suggestions are preliminary and incomplete. Review of PWB 2021 engagement survey results is crucial to fully developing these suggestions and the PUB team recommends that the Board request it be provided promptly.

- **Act on the recruitment and retention actions** outlined in the May 18, 2021, *Response to City African American Network letter*.
- **Resource the BHR internal Equity Manager’s Dashboard development and maintenance.** BHR has only produced one workforce data report for Equity Managers. BHR has not had the capacity to maintain this dashboard in the long term. City employees report this creates a barrier for Equity Managers across all Bureaus to inform workforce related equity issues. Sufficient funding and staffing is necessary to ensure the data collection and analysis is accurate and relevant.
- **Ensure the public-facing workforce dashboard is up to date.** The work of maintaining the public facing dashboard should also be fully resourced.
- **Implement 360 reviews for managers and supervisors with four or more direct reports.** Ensure both Bureaus meet this expectation to incorporate valuable feedback from employees, peers, and colleagues in performance reviews as part of the citywide implementation in Fiscal Year 2022-23.
- **Investigate challenges the Asian and Hispanic or Latinx PWB employees face and take action to address the situation.** This recommendation is based on BHR [online employee demographic data](#) which showed that Asian and Hispanic or Latinx employees are under-represented in the PWB employee base.
- **Review and revise HR administrative rules through a racial equity lens.** The PUB team is aware that various efforts to conduct a racial equity analysis of HR administrative rules which govern workplace personnel issues have, at various points, started and stopped, including in response to the CAAN report. This work should be resourced; BIPOC staff, including frontline staff, should be given ample paid time to participate as needed; and this work should continue without delay and avoid interruption.

### Findings

**Beyond the City** — The PUB team began by reaching out to contacts in sister jurisdictions to see if anyone knew of pandemic related surveys, conducted by their employers, that were disaggregated by race and ethnicity. Tantalizingly, the team heard that early in the pandemic the City of Seattle conducted a survey with responses disaggregated by race and ethnicity that revealed a distinct preference of BIPOC staff to remain remote as compared to white staff. The team reached out to Seattle’s HR department several times but did not hear back so could not corroborate.

The team’s contacts at other jurisdictions shared that they were unaware of any pandemic related surveys that included racial and ethnic disaggregation of data. While this does not mean that issues of racial equity were not being considered vis-à-vis remote work, re-entry to the office, or on-site work during the pandemic, it does suggest that racial equity was likely not centered in leadership-level discussions since data was not available. In general, our contacts expressed agreement of the importance of these issues and appreciation to the PUB for raising them.

Beyond the City this topic has been widely covered in the news. In a blog post, Future Forum also reports that: “...Only 3% of Black knowledge workers want to return to full-time co-located work (vs. 21% of white knowledge workers in the U.S.)”<sup>18</sup>

**BES** — In an April 2021 survey, over 90% of respondents chose “the ability to work remotely” in answer to “what pandemic-related adjustments would you want to continue after the pandemic is over?” This was true even for employees who were unable to work remotely during the pandemic. If given the choice, almost nobody



<sup>18</sup> A new era of workplace inclusion: moving from retrofit to redesign, <https://futureforum.com/2021/03/11/dismantling-the-office-moving-from-retrofit-to-redesign/>

See also: *Why many Black employees don’t want to return to the office*, <https://www.cbsnews.com/news/black-workers-return-to-office-future-forum-workplace/> and *Returning to the Office...While Black*, <https://www.wnycstudios.org/podcasts/tnyradiohour/segments/returning-office-while-black>

said they would want to work 100% of their work time in a BES/City facility. 34% wanted to work entirely remotely, and 35% wanted a hybrid schedule – nearly 50% of those said 1-2 days per week in the office was preferred, 20% chose 3-4 days (the remainder didn't answer or chose "other"). On a general note, it seemed staff were feeling that their hard work was not being recognized.

Again, what would have been extremely valuable would be to know how the survey responses broke down by race and ethnicity; by location, telework or onsite; and possibly other salient factors, e.g., department/service area, job classification. In the absence of Bureau specific data, we may fairly infer that only a tiny percentage of BIPOC staff are likely to wish to return to the office on a full-time basis.

I see no benefit for me, my family, or the City having me in the office. I am struggling to get help at home that allows me to be away all day. The care help I had before COVID is no longer available and I can't seem to replace that paid assistance which allowed me to be gone all day.

– City Employee, April 2022 <sup>19</sup>

19

**PWB** – PWB conducted a survey titled, "Re-envisioning the Workplace," where respondents overwhelmingly valued remote work. The survey included nearly all remote workers, plus 32 responses from individuals whose work cannot be remote. 85% of employees were hoping that remote work-related adjustments and flexibility would continue post pandemic. This survey did not break out responses demographically to discern whether certain populations valued different benefits of the ability to work remotely. This might have afforded the Bureau with an opportunity to understand the ways in which the pre-pandemic work environment was "created to accommodate the needs of white people, and specifically men."<sup>20</sup>

**City-wide** – The City has now moved into Hybrid Pilot Phase 1 of Workplace Reentry which is currently planned to run from April 18, 2022 through September 2, 2022. Disappointingly, racial equity considerations appear to have played little to no role in leadership's development of the Phase 1 policies and procedures.

<sup>19</sup> The City Employee quotes were provided in response to an anonymous survey in April 2022 with no way to determine the ethnic, racial, or gender identity of the respondents. The PUB team was unable to ask the respondents' permission to use the quotes but included them since they were relevant, provide no information that could be used to identify the individual(s), were responses to an employer survey and thus, the respondent(s) might naturally assume replies may be shared in some format. The hope is that including the quotes will elevate the issues and amplify the concerns shared by the employee(s).

<sup>20</sup> *Who Wants to Return to the Office?*, <https://fivethirtyeight.com/features/why-post-pandemic-offices-could-be-whiter-and-more-male/>

I do not feel great. Everyone seems so excited to get back in the office. Folks that are there more than required seem to be encouraging others to do the same. It feels pressuring, like I'm not a team player or something. Being in the office is not productive for me and I miss being able to get work done on the days I am now required to be in the office. I am less productive and that means I work weekends / eves to keep up.

– City Employee, April 2022 <sup>19</sup>

### **Suggestions**

- **Act now to address workforce environment issues faced by BIPOC staff.** Even though Phase 1 of Workplace Reentry has already begun, start now in taking actions to address workforce environment/culture issues faced by BIPOC staff.
- **Build racial equity considerations into the core of Phase 2 plans.** All policies and procedures related to Phase 2 should be run through a racial equity lens. Sometimes, racial equity is used as additional fodder in decision-making – like an object that can be picked up and dropped as needed depending on the exigencies of the situation.<sup>21</sup> In order to unleash the full potential of the workforce so that BIPOC employees can thrive, racial equity should be woven into the fabric of decision-making at all levels.
- **Limit/Eliminate top-down approaches.** Future Forum reports repeatedly noted the top-down approach and the disconnect between executives and everyone else. The Bureaus should consider methods for ensuring the perspectives of BIPOC staff become an integral part of organizational decision-making.
  - For instance, any taskforce or committee should include seats for frontline BIPOC staff and equity managers. This suggestion is consistent with PWB's Plan to Advance Equity, Diversity and Inclusion's 5-year objective on participatory decision-making: "Research and adopt models of effective shared governance, such as decision-making committees and participatory budgeting." (pg. 28)
  - Another suggestion would be to ensure that affinity groups are engaged in developing significant workforce policies. (See, Subgroup #2: Retention, led by Dr. Koffi Dessou + Aly'ce Brannon-Reid.)

<sup>21</sup> Dr. Tema Okun identifies a continued sense of urgency as one of the characteristics of white supremacy culture. The characteristics are "damaging because they are used as norms and standards without being proactively named or chosen by the group. They are damaging because they promote white supremacy thinking. Because we all live in a white supremacy culture, these characteristics show up in the attitudes and behaviors of all of us – people of color and white people." The sense of urgency "makes it difficult to take time to be inclusive, encourage democratic and/or thoughtful decision-making, to think long-term, to consider consequences." white supremacy culture by Tema Okun. dRworks. [www.dismantlingracism.org](http://www.dismantlingracism.org)

- **Develop and launch trauma informed approaches.** We are living and working through a traumatic period that has stressed individual financial and emotional resources and mental health. We encourage the Bureaus to integrate knowledge about this trauma and the impacts of microaggressions as it formulates its policies and practices.
- **Engage and include on-site workers.** The Bureaus should ensure they are fully engaging with and including the needs of employees who work on-site in workplace and organizational culture surveys as well as other efforts around workplace culture.
- **Monitor.** Conduct a survey, disaggregated by race and ethnicity, in 6 to 9 months after remote workers return to in-office or hybrid work schedules.
- **Disaggregate data by race and ethnicity.** Employee survey data on work environment and culture must be disaggregated by race and ethnicity if it is to be useful for racial equity work.
- **Use all sources of data: Bureau data, proxy data, and community knowledge in your decision making.** If data is lacking in one category, look to data from the other categories. Synthesizing and analyzing the available data from all categories will also provide deeper understanding of the complexities of the issues and assist in identifying concrete, innovative actions that can be taken.

From Future Forum's October 2021 Pulse report,  
*The great executive-employee disconnect.*

- Eighty-seven percent of Asian respondents and 81% of Black respondents want flexible or hybrid work, compared to 75% of white respondents. (pg. 4)
- In particular, since the broad adoption of remote-work policies, employee experience scores for Black knowledge workers have risen most sharply, with Black men making the biggest quarter-over-quarter gains in employee experience out of all demographic groups in the U.S. (pg. 4)
- Most executives (66%) report they are designing post-pandemic workforce policies with little to no direct input from employees. (pg. 3)
- While two-thirds of executives (66%) believe they're being "very transparent" regarding their "post-pandemic" policies, less than half of workers (42%) agree. (pg. 3)

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## ***Conclusion and Next Steps***

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In closing, our report has covered five central themes and provided a host of suggestions that we hope will invigorate the work ahead. As you absorb and contemplate this report, we ask you to answer these questions:

- Are our BIPOC employees seen, heard, and valued, especially during times of change or transition?
- Can I add my voice as an amplifier for the needs of our BIPOC employees?
- Is there a suggestion I would add to this list?
- What projects should be appropriately funded to promote workforce racial equity?

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## ***Acknowledgements***

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We acknowledge the many City staff who take great efforts, including career risks, to speak truth, advocate for change, and move workforce racial equity forward in whatever way they can from their perch within the City system. To them, both those known and unknown, your work is valued and will inure to the benefit of all Portlanders. We also thank the many folks who generously gave of their time over the course of the last 10 months in assisting the PUB team in developing this report. To preserve confidentiality, we cannot thank everyone by name. Be assured your passion and commitment was palpable—even through Zoom.

We wish to heap special praise on our indomitable PUB staff, Eliza Lindsay and Amy Archer-Masters, who kept this project on track and gave us the space for our thoughts to flourish.

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*“The power of visibility can never be underestimated.”*

*– Margaret Cho*

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## ***List of Primary Documents Consulted***

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This is a list of the primary documents consulted. [Brackets] indicate the filename and is included in cases where the document title may not immediately make clear which file contains the document.

The list does not include informal email or oral communications. Where a document is available online a URL has been provided.

### **Bureau of Environmental Services**

- *2021 PUB Workforce Data Request Response – BES (Final)*
- *BES 2016-2021 Discipline Summary Report*
- *BES April 2021 COVID-19 Re-entry Survey Summary* [BES ReEntry Survey Summary May 2021]
- *BES COVID-19 Survey #2 Summary Results*
- *BES Equity Plan 2016-2021*
- *BES Exit Interview Summary*, January 28, 2022
- *City of Portland Bureau of Environmental Services Columbia Boulevard Treatment Plant: Needs Assessment Review*, Stantec, January 25, 2022 [CBWTP-NeedsAssessmentJan2022]
- *O&M Needs Assessment Report and Next Steps*, February 28, 2022 [directorjordan-cbwtp-memo-2-28-22]
- *Workforce Development and Culture Survey Results*

### **City-wide**

- BHR 3.03 Administrative Rule: *Types of Appointments*  
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- *Continued Support for Black Employees* [CAAN Director Letter II]
- *City of Portland Black Workforce Report*, City African American Network.
- *Subgroup #2: Retention*, led by Dr. Koffi Dessou + Aly'ce Brannon-Reid [Subgroup 2 Top Activities for Director Presentation 2021-08-18]
- *Public Human Resources Analytics Dashboard*  
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- *COVID-19 Cases and Deaths by Race/Ethnicity: Current Data and Changes Over Time*, Latoya Hill and Samantha Artiga, February 22, 2022  
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- *Dismantling Racism Works Web Workbook* [www.dismantlingracism.org](http://www.dismantlingracism.org)  
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- *The 'great replacement' conspiracy theory isn't fringe anymore, it's mainstream*, Odette Yousef, May 17, 2022  
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- *Leveling the playing field in the hybrid work environment*, future forum, January 2022  
<https://futureforum.com/wp-content/uploads/2022/01/Future-Forum-Pulse-Report-January-2022.pdf>
- *A new era of workplace inclusion: moving from retrofit to redesign*, future forum, March 11, 2021  
<https://futureforum.com/2021/03/11/dismantling-the-office-moving-from-retrofit-to-redesign/>
- *Oregon COVID-19 Case Demographics and Disease Severity Statewide* (Oregon Health Authority dashboard),  
<https://public.tableau.com/app/profile/oregon.health.authority.covid.19/viz/OregonCOVID-19CaseDemographicsandDiseaseSeverityStatewide/SeverityTrendsDeath>
- *Racial and ethnic inequality has cost US economy \$51 trillion since 1990*, September 12, 2021  
<https://www.weforum.org/agenda/2021/09/racial-and-ethnic-inequality-has-cost-us-economy-51-trillion-since-1990/>
- *Report: Hate crimes rose 44% last year in study of major cities*, Rachel Tillman, February 15, 2022

<https://www.ny1.com/nyc/all-boroughs/news/2022/02/14/hate-crime-increase-2021-asian-american->

- *Report of San Francisco Independent Reviewer for Mayor London Breed*, William B. Gold IV, June 2021
- *Returning to the Office...while Black*, KalaLea, March 18, 2022 (podcast with transcript)  
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- *SFMTA Racial Equity Plan Action Plan: Phase I – Internal Programs and Policies*, December 2020
- *Two Years After George Floyd's Murder, Minneapolis Is Still Struggling to Redefine Policing*, Josiah Bates and Janell Ross, May 25, 2022  
<https://time.com/6180605/minneapolis-police-reform-george-floyd-murder/>
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- *What One Million COVID Dead Mean for the U.S.'s Future*, Melody Schreiber, March 29, 2022.  
<https://www.scientificamerican.com/article/what-one-million-covid-dead-mean-for-the-u-s-s-future/>
- *What Racism Costs Us All*, Joseph Losavio, September 2020  
<https://www.imf.org/Publications/fandd/issues/2020/09/the-economic-cost-of-racism-losavio>
- *Who Wants to Return to the Office*, Angelica Puzio, August 11, 2021  
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- *Why many Black employees don't want to return to the office*, Khristopher J. Brooks, October 26, 2021 <https://www.cbsnews.com/news/black-workers-return-to-office-future-forum-workplace/>

### **Portland Water Bureau**

- *Engagement Profile, 2010* [2010 PWB Employee Engagement Survey]
- *Engagement Profile, 2015* [2015 PWB Employee Engagement Survey]
- *Plan to Advance Equity, Diversity, and Inclusion* [PWB-EDI plan]
- *Re-Envisioning the Workplace: Employee Survey Analysis*, June 22, 2021
- *Response to City African American Network letter*, May 18, 2021 (memo)
- *Workplace Environment Data*, November 17, 2021 (memo)

# Appendix D

## FY 2021-2022 Portland Utility Board Communications to Council

### Contents

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April 7, 2022 .....	PUB Recommendations for the Bureau of Environmental Services and the Portland Water Bureau FY 2022-23 Requested Budgets

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City Budget Office  
1120 SW Fifth Avenue Ste 1010  
Portland, Oregon 97201

To: Mayor Ted Wheeler

Commissioner Mingus Mapps

Commissioner Carmen Rubio

Commissioner Dan Ryan

Commissioner Jo Ann Hardesty

Michael Jordan, Bureau of Environmental Services

Re: PUB support for increased funding for Portland Harbor  
Community Grants

Date: November 4, 2021

The Portland Utility Board (PUB) serves as a community advisory board for the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB). At our September 16, 2021 Board meeting, members of the Portland Harbor Grant Committee shared their experience reviewing this year's proposals, interviewing applicants and awarding funds. The Grant Committee members, themselves volunteers, recognized that the budgeted grant funds are insufficient to fund the high-quality proposals they received. They asked PUB to support a significant funding boost for the Portland Harbor Grant Program.

PUB wholeheartedly endorses the amendment to Ordinance No. 189696 that authorizes the Director of the Bureau of Environmental Services, or the Director's designee, to increase funding for the Portland Harbor public involvement program by \$1,500,000 for grants and other public involvement activities to support meaningful participation through the remedy design phase – likely FY 2024-2025 – and allows individual grants to exceed \$5,000, with inflation increases.

PUB believes the community engagement that the Portland Harbor Grant Program facilitates is a cornerstone of the harbor's ecosystem restoration. The program's goals also closely align with PUB values: clean and safe water, a healthy ecosystem, and a belief that those most affected by racial and economic inequalities should be afforded culturally appropriate opportunities to speak for themselves. The Harbor Grant Program has successfully demonstrated its ability to create these meaningful opportunities for community members most connected to the river. These communities bring lived experience and expertise that deserve fair compensation and PUB stands solidly with The Harbor Grant Program in their ask for more funding.

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1120 SW 5<sup>th</sup> Ave, Ste 1010

To: Mayor Ted Wheeler

Commissioner Mingus Mapps

Commissioner Carmen Rubio

Commissioner Dan Ryan

Commissioner Jo Ann Hardesty

Auditor Mary Hull Caballero

Re: Requested Budgets for FY 2022-23 for the Bureau of  
Environmental Services and the Portland Water Bureau

Date: January 26, 2022

The Portland Utility Board (PUB) serves as a community-based advisory board for the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB).

This initial budget letter, in compliance with City practice for budget advisory committees, is an early opportunity to share our preliminary planning and the considerations that will guide our next several months of budget work. This letter is the first of several of PUB's touch points with City Council throughout the annual budget and planning processes.

In reviewing the full budgets for both bureaus, the PUB will focus on those programs that affect four priority areas particularly important to us. This approach efficiently uses time, engages the PUB more effectively in the policy decisions that drive budget, and allows the PUB to provide more valuable and focused feedback to Council and the bureaus.

### **PUB's Priority Areas**

These priority areas come from our [FY2021-2022 Workplan](#) and apply to all our budget and policy work.

#### ***Racial Equity***

Consistent with the [PUB's Beliefs, Values and Anti-Racist Principles](#), the Board centers racial equity in all its decision-making. Black, Indigenous, and People of Color (BIPOC) communities bear an inequitable burden due to the impacts of past and current policies and practices rooted in systemic racism. In developing recommendations, the Board will not only analyze the distribution of burdens and benefits, but also consider

how to advance reparative actions that address harm done by past inequitable policies, actions, and practices.

### ***The Climate Crisis and Climate Justice***

We are in a state of climate emergency, as declared by the City of Portland<sup>1</sup>. The PUB recognizes that marginalized communities are disproportionately impacted by climate change while contribute least to the problem and often benefit least from climate resiliency strategies. The Board will work to ensure the bureaus are taking an active stance on reducing their carbon footprint and takes a climate justice approach to addressing the climate crisis. The Board will work to ensure that the most impacted communities are included in the decision-making processes and that bureau climate policies equitably distribute benefits and burdens.

### ***Innovation and Efficiency***

The Board will ask how programs will use new technology and make existing systems and operations more efficient to ensure that innovations and efficiencies benefit communities, advance equity and do not happen at the expense of marginalized communities.

### ***Inter-Agency and Cross-Sector Collaboration***

The Board will look for opportunities for inter-bureau and inter-agency collaboration, cooperation, and sharing of resources such as staff expertise and equipment in ways that advance equity and enhance services.

Detailed versions of these priority areas can be found in the Board's Annual Report and Work Plan found here: <https://www.portland.gov/sites/default/files/2021/pub-fy-2020-21-annual-report-workplan.pdf>

### **PUB's Focus on Affordability, Financial Assistance and Budget Guidance**

The Mayor's budget guidance directs the bureaus to build their budgets within rates approved in the bureaus' FY 2021-22 multi-year financial plans, for a combined rate increase of approximately 4.86%. The PUB will weigh in on the rate increase further in the budget process. The Board supports the additional guidance for the utility bureaus to prioritize rate stability and predictability and to prioritize outreach about current and new financial assistance programs, seeking new and creative ways to provide access to those in need. The PUB will also provide recommendations about ratepayer exposure to costs associated with the City of Portland liability in the Portland Harbor Superfund Cleanup site. We also support the Mayor's guidance to increase investment in equity and inclusion, meaningful climate action, houselessness, and health and safety of employees.

The PUB continues to prioritize affordable water, wastewater and stormwater service for all Portlanders, particularly for people that bear the brunt of structural inequities. We also intend to develop detailed recommendations for the bureaus on developing equitable debt collection and financial assistance practices. The PUB will continue to question how revenue shortfalls may affect rates, the cost of ongoing service and the need to maintain and improve aging

<sup>1</sup> [City of Portland Climate Emergency Resolution Number 37494, passed by Council June 30, 2020.](#)

infrastructure. In the interim, the Board provides the following recommendations regarding financial assistance programs, collections and debt recovery efforts.

**Center those most impacted** - The PUB recommends that collections, billing, and financial assistance programs center the needs of those most impacted by structural inequities and the cascading effects of the pandemic. At each design decision point ask: How will this benefit or burden those who are most vulnerable? Collection activities must not cause individuals and families who cannot pay their utility bill to lose their service or housing.

**Approach customers with compassion** – Approach customers with compassion. Assume first if a customer is not paying their bill, it is because they are struggling financially. The Board recommends that:

- Reminder notices be worded and designed so they do not feel punitive.
- Continue to offer extended payment plans. Continue to remind and authorize frontline staff to extend the payment period for up to a year and for there to be an accessible and equitable process by which a customer can be granted an even longer payback period.
- Explore additional debt forgiveness options within the current covenant restrictions with City Attorneys and Debt Managers beyond what is available through the “safety net program”, Administrative Review Committees and/or Financial Assistance Programs.

**Collaboration** – Pursue collaboration between BES, PWB, other City bureaus, agencies, and cross sector to increase efficiency, innovation, and equity in collections, billing/debt recovery, and financial assistance practices. Ensure that City debt collection efforts by various bureaus do not cause amplified and negative impacts on community. Continue to collaborate with peers nationwide in developing and improving financial assistance programs.

The PUB will strive to ensure that the bureaus are providing help to people in need.

### **Next steps**

Over the coming months the PUB anticipates more comprehensive review of the FY 2022-23 proposed operating budgets, program offers, and capital improvement plans. We look forward to analyzing and evaluating the bureau’s Requested Budgets and the City Budget Office (CBO) analysis and providing additional feedback to City Council. As the budget develops, the PUB will provide a letter with recommendations regarding the budgets, participate in the budget work sessions in March, the utility rate hearing in May, as well as discuss budget issues with the Mayor and City Council if requested.

The PUB is grateful for the significant support we receive from the bureaus’ directors, staff, ex-officio members; Council and their staff; the City Budget Office; and PUB staff. We welcome open communication with City Council and your feedback on our budget recommendations, our proposed approach or the values and frames that guide our work.



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To: Mayor Ted Wheeler

Commissioner Mingus Mapps

Commissioner Carmen Rubio

Commissioner Dan Ryan

Commissioner Jo Ann Hardesty

Auditor Mary Hull Caballero

Re: PUB Recommendations for the Bureau of Environmental Services and the Portland Water Bureau FY 2022-23 Requested Budgets

Date: April 7, 2022

The Portland Utility Board (PUB) serves as a community-based advisory board for the Bureau of Environmental Services (BES) and the Portland Water Bureau (PWB).

The PUB is grateful for the support we receive from the public, the bureaus' directors, staff, and ex-officio members as well as the Council, City Budget Office, and PUB staff. The PUB has held multiple board meetings over the last several months focused on gathering information needed to understand the complex budgets for both bureaus and developing feedback in line with PUB's values and priority areas. This second letter during the budget cycle summarizes our recommendations to Council on the bureaus' FY 2022-23 Requested Budgets and priorities.

**FY 2022-23 Requested Budgets**

The Bureau of Environmental Service's (BES) FY 2022-23 budget request includes \$439.2 million in operating and capital expenditures, with no change in positions. The total rate of increase for the typical single-family household to support the bureau's requested budget would be 3.15% or approximately \$2.52 month.

The Portland Water Bureau's (PWB) FY 2022-23 budget request includes \$286.1 million for operating and capital expenditures, with five new positions. The decision packages include a \$745,000 General Fund request to assess Reservoir 6 of the Mt Tabor Reservoirs. The total rate of increase for the typical single-family household to support the bureau's requested budget would be 7.7% or approximately \$3.73 month.

Both bureaus' Requested Budgets also include American Rescue Plan Act (ARPA) funding requests.

### ***Rates, Affordability, Financial Assistance, and Equitable Debt Recovery***

The PUB understands there is a delicate balance between affordability and the capital investments needed to maintain and improve infrastructure while striving for climate resilience. In the best of times this is a tough balancing act. As you are aware, it is even more difficult given the multi-year pandemic, rising costs of labor and materials, and the economic impacts of the war in Ukraine and Russian sanctions. The PUB considers issues of affordability through the lens of racial equity; centering those most impacted by structural inequities in its analysis and recommendations.

**Affordability of Rates** - The PUB appreciates that both bureaus met budget guidance with their budget requests but remains concerned about the affordability of utility rates. Combined, the rate increase for both PWB and BES would result in a monthly utility increase rate of 4.86%. A typical single-family residential bill would increase by \$6.25 from \$128.68 per month up to \$134.94 month. The PUB is concerned about the proposed rate increase during a period of increasing inflation when many are already struggling economically. The resulting bill increase from a 4.86% rate increase could prove unaffordable to many Portlanders with a likely disparate impact on black, indigenous, communities of color, low-income households and others who already bear the brunt of structural inequities.

Long-standing issues of affordability have been exacerbated by the pandemic. Thus, regardless of the eventual rate increase approved this year, issues of affordability will remain. The PUB prioritizes financial assistance and equitable debt recovery as tools to address racial equity and affordability. In previous communications to Council and the bureaus, the Board has provided specific recommendations around financial assistance and debt recovery such as the need to expand the financial assistance program, including to renters; increase outreach efforts; increase the number of languages information is available in; use of innovative outreach methods, e.g., videos or audio; and collaboration between BES and PWB as well as other bureaus City-wide on both financial assistance and debt recovery in ways that center those most impacted and take a whole person approach to ensure the bureaus' collections efforts are not worsening economic situations of those already struggling. In the coming months the Board expects to provide additional detailed recommendations on financial assistance and debt recovery.

**Shift to See Opportunity Instead of Challenge in Financial Assistance** — The BES financial forecast documents frame the expansion of the low-income assistance programs as a “medium risk” to the forecast for the potential future impact on rates. While that is reasonable for financial planning, the PUB encourages both bureaus to also look at the need for increased low-income assistance as an opportunity. For example, a goal to expand financial assistance could

promote exploration of more equitable funding models, pursuit of state and federal grants, and investments in culturally sensitive outreach and engagement.

**Support Alignment with Equity** - The PUB supports the PWB's plans in FY 2022-23 to review the residential bill discount program and crisis vouchers to align with equity goals, as well as advancing the BES rate study to address the inequitable rate structure for stormwater rates. The PUB appreciates the six shared performance goals related to affordability as an example of effective inter-bureau collaboration.

**Support for Alternative Funding Sources and Models** — The Board encourages the exploration of alternative means to fund low-income assistance besides rate increases, such as federal and state assistance and grants. The PUB is supportive of the requests for ARPA grant funds by the utilities, including important \$2.6 Million support already received for bill credits for low-income customers with accounts in arrears in the first round of relief. Since the first round, the bureaus estimate customers need an additional \$16.3 Million in support for bill credit. The Board is supportive of the additional funding sought to expand bill credits and protect ratepayers from the pandemic associated debt.

The PUB encourages the bureaus as part of the BES rate study and other efforts to examine and address affordability to consider and explore other models and funding structures for providing basic water, sewer, and stormwater services. The PUB looks forward to robust conversation with the bureaus and Commissioner Mapps in the coming months on the rates and affordability.

### ***Infrastructure Investments and Capital Projects***

The utilities manage over \$30 Billion in infrastructure that provide vital water, sewer, and stormwater services. The PUB recognizes a need for stewardship of aging infrastructure and generally supports the bureaus' prioritization of repairing the systems in poorest condition first to protect public health, maintain essential services and begin to address racial disparities in public investment. The PUB supports PWB's FY 2022-23 budget priority to apply equity impact assessments to capital project planning. The Board would like to see the equity impact assessment for the Advance Metering Infrastructure project.

**More Clearly Communicate Long-term and Resilience Planning** - The PUB encourages the bureaus to better explain how they manage assets to balance short-term needs with longer-term resiliency planning (e.g., land acquisition and watershed restoration for BES; Willamette Crossing and Bull Run habitat conservation for PWB). The PUB recognizes that the bureaus have multiple plans that attempt to balance near and long-term system needs, but that necessary balance is not clearly conveyed in budget documents. Clearly communicating about this balance is critical to the PUB's, as well as the public's, confidence that the bureaus are adequately planning for climate change adaption as well as mitigation for the city's most vulnerable communities.

**Need for City-wide View of Capital Improvement Planning** - It would be helpful for Council, PUB, other bureau advisory boards, and community members to know how the utility infrastructure needs fit in with other upcoming major citywide capital needs and decisions. Although the utility rates may be independent from other funding sources, Portlanders have limited resources and view the City as a single entity. Major capital investment decisions need to be balanced citywide to understand the collective impact on community members.

**Attention to Intergenerational Equity** – The Board wishes to ensure that both rates and the pace of investment in infrastructure are fair to current and future Portlanders. The Board is aware that if we don't make enough infrastructure investments now, future generations will have to pay more and may face immediate and catastrophic infrastructure failures. However, the Board is also concerned that this heavy shift of balance towards the current Portlanders with steep rate increases to fund long-term infrastructure projects may cause a catastrophic financial impact for families and individuals who are vulnerable to steep rate increases during a time where there are already layers of economic uncertainties. The PUB recommends attention to prioritizing capital improvements so that intergenerational equity is achieved.

**Conduct Further Cost-Benefit Analysis of AMI** – One of the largest increases to the Capital Improvement Plans for both bureaus was the addition of the joint \$90 million Advanced Metering Infrastructure (AMI) project planned over the next seven years. Although there may be value in providing smart meters, such as moving to actual meter reads for monthly billing, it was not clear to the PUB whether the benefits truly exceed the costs or whether the timing is right to proceed. Because the Board is concerned about the timing and viability, it encourages a more robust examination of how the financial and non-financial benefits of AMI more than "offset the cost" as the Diameter report states. The Board has also questioned the logic of an even cost split by the utility bureaus for the AMI implementation and encourages more justification of the division of costs.

It was not clear what the direct rate impact would be if this project was removed from the budget or delayed. During a time when people continue to struggle to pay their bills, every rate increase has impact. It is critical that infrastructure investments are timed appropriately and have a justifiable return on the investment.

**Mt Tabor Reservoir Dam Safety** - The PUB did not have much time to discuss the Mt Tabor Reservoir Dam Safety decision package request for General Fund dollars. However, the Board acknowledged the City Budget Office opposition to the funding due to the limited resources available, lack of safety threat, and unclear long-term costs of repairs and responsibilities. The PUB did not find that information provided in budget materials made a compelling case that this investment of General Fund dollars would address any of PUB's priority areas.

## ***Mayor's Housing and Houseless Service Priority Area***

The PUB encourages the bureaus to develop policies and practices that address the needs of those most impacted by structural inequities and has prioritized the intersections of the bureaus work and houselessness for several years.

**Support for Staff Training and Safety** - The Board appreciates the memos the bureaus wrote addressing Mayor Wheeler's priority areas. In the Housing and Houseless Services Priority Area, the PUB would like to see the bureaus identify additional training for field staff including de-escalation and trauma informed care, equity and inclusion practices when working with the public, safety measures and other support bureau staff will receive to respond effectively to community members who may be experiencing a crisis, for example may be experiencing houselessness. In addition, we encourage the bureaus to provide materials on resources the City has available to staff that may be experiencing challenges related to this work.

**Support for Customers Impacted by Housing Crisis** - The Board recommends the bureaus continue exploring how they can be key partners in providing direct support to those impacted by the housing crisis. Financial Assistance programs should be reaching people before they are at the point of desperation and may be at risk of losing housing. Some recommendations have been referenced above, in prior letters and will also be forthcoming. In addition, debt recovery activities for basic utilities should not put customers at risk of losing housing. The PUB is also supportive of the following requests for ARPA grant funds that may support housing and career opportunities for Portland residents who are housing insecure or experiencing houselessness:

- brownfields remediation and land restoration to prepare for reuse as affordable housing and support for the shelter to housing continuum, and
- the Green Workforce Collaborative that would establish a paid career opportunities program that protects public health while expanding economic opportunities for the community.

## ***Support for Community Engagement Investments***

The PUB generally supports increased community engagement efforts, particularly in communities historically and currently excluded from public policy conversations (e.g., black indigenous, communities of color, immigrant communities, renters). The Board has expressed support for greater investment in this area in past budgets and supports new and readjusted budget items prioritizing community engagement in the FY 2022-2023 bureau budgets as well. The PUB was pleased to learn that two new part-time staff at PWB will focus on affordability outreach. The Board also supports BES resources such as Community Engagement Liaisons (CELs) in the Watershed Revegetation Program Stormwater Operations and the plan for liaisons to focus on communities speaking primary languages other than English. A second BES program PUB was pleased to see highlighted in the BES Equity report is the Community Watersheds Stewardship Program that coordinates with the City's New Portlander Program to outreach to immigrant and refugee communities.

The PUB believes that meaningful community engagement also depends on the bureaus' recognition that different communities experience bureau services and information in different ways. Accessible language and equity analysis in budget documents may help the public better understand how bureau services impact them and how they can affect bureau services. The PUB believes the bureaus' application of the Budget Equity Strategy Tool to their budget submissions and the comprehensive equity reports included with the budget submissions are important to transparency and public understanding. The PUB thanks the bureaus' Equity Managers for the budget equity training they provided to bureaus and for composing the equity reports.

### ***Racial Equity and Workforce Development***

The PUB adopted principles to actively work to maintain an inclusive board culture and for holding themselves and the bureaus accountable for identifying and addressing racism, systemic racism, and structural inequities ([PUB Beliefs, Values, and Anti-Racist Principles](#)). The Board's racial equity work this year has particularly focused on workforce related issues. The Board currently has a project team working on gathering and evaluating data and will be developing detailed recommendations in coming months.

**Sufficiently Staff Racial Equity Workforce Efforts** – Based on preliminary research from the PUB project team, the PUB recommends that the bureaus ensure sufficient and dedicated staffing are allocated to the hiring, retention, and promotion of a diverse workforce. The Board also recommends a dedicated effort to evaluate the career pathways within the bureaus so that employees have opportunities to advance in their careers. Initial analysis suggests current staffing levels are not sufficient to implement either of these recommendations, let alone both.

**Provide Data Disaggregated by Race** – The Board is interested in measurable data that can be disaggregated by demographics, particularly race. The PUB appreciates the City's development of the equity dashboard, which disaggregates personnel data by race and gender for equity managers. The Board supports the two new positions to implement the PWB Strategic plan, focusing on internal communication and employee engagement.

As the project team has gathered data, it has proven challenging since often demographic data has been unavailable. As an early step, the Board recommended that as the bureaus are planning for the return to office of remote workers that they collect qualitative, demographic, and other relevant data in order to assess the impacts, in particular the potential disparate impacts on BIPOC employees. The PUB recognized this as an opportunity to reduce racial trauma at a critical moment for our communities of color.

The Board will continue to collaborate with the bureaus on this high priority topic and share more detailed recommendations once they are available.

## ***Transparency, Coordination, and Communication***

The AMI project investment resurfaced a periodic concern for the PUB that hampers the board's ability to provide effective and timely guidance to City Council and the bureaus. The Board was not apprised of AMI in advance of the budget process. This made it extremely difficult to gather enough information to make informed recommendations during the tight budget timelines. When the PUB is engaged earlier, the board's expertise is more fully utilized, and it is better positioned to provide meaningful input on significant proposals. This results in more actionable feedback for Council and the bureaus and more authentic and rewarding experience for both the PUB and the bureaus.

In previous letters to Council, the PUB has highlighted the benefits of and need for timely, transparent communication with the board. In the PUB's most recent [2021 Annual Report](#) the board identified a priority focus area of improving transparency, coordination, and communication with the bureaus. During the work session Commissioner Mapps indicated interest in engaging with the PUB and the bureaus to resolve this issue and the PUB looks forward to working with leadership on this process improvement.

### **Next Steps**

In closing, the PUB appreciates the efforts the bureaus have made to work with the board, and we look forward to collaborating on the issues identified in this letter.

The PUB views this opportunity to comment on the bureaus' budget submissions as one of several touch points with City Council throughout the annual budget and planning processes. If you have any questions or suggestions, please reach out. The Board looks forward to continued conversations about the budget and utility services.



## Appendix E

### FY 2021-22 Portland Utility Board Members

## Biographies of Fiscal Year 2021-2022 Board Members

### ***FY 2021-22 Voting Members***

**Alexander Lopez III (Alex)** is a social worker and environmental geologist (registered in Oregon and Washington) working to center community perspectives in environmental remediation and policy. Utilizing his scientific background and social work education and experience, he strives to understand, call attention to, and mitigate the human impacts of environmental degradation, particularly on communities that have suffered historic and ongoing marginalization. Alex has over 15 years of experience performing environmental remediation work in Oregon and has worked on projects ranging in size from large superfund sites to small residential properties. He has experience with local, state, and federal environmental regulations and uses that experience while engaging with the public to help community members understand the legal and technical aspects of environmental cleanup work. He is particularly interested in brownfield redevelopment and superfund community engagement. Additionally, Alex has an interest in environmental policy, particularly as it relates to environmental justice issues. Alex holds bachelor's degrees in Geology (geophysics) and Mathematics from the University of Texas and will be graduating with a Master of Social Work in August 2021.

Term: July 1, 2021 – June 30, 2024; resigned effective July 1, 2022.

**Cayle Tern** earned a BS in Business Administration from California State University, Chico, and Master of Social Work from Portland State University. Cayle is a first-generation refugee from Laos, a leader in the in the Asian American and Pacific Islander Community. Cayle serves on the Pacific Islander and Asian Family Center Advisory Board, a Board Member of the East County Rising PAC, a Councilman Member of Service International Employee Union PAC (Oregon), and a recently elected Reynolds School Board Director. Cayle has 15 years' experience as a Human Services worker with the Oregon Department of Human Services. Social Justice and Equity is at the forefront of every conversation and the Portland Utility Board should be no exception.

Term: July 1, 2021 – June 30, 2024; resigned effective September 6, 2022.

**Gabriela Saldaña-López** is a community organizer in Portland. She was born and raised in Southeast and East Portland and has a double BA from the University of Oregon in Planning, Public Policy and Management, and International Studies with a concentration in nonprofit administration. She joined the PUB in 2019 and brings a unique perspective, connections, and experience through her community organizing and event coordination roles over the years and is passionate about advancing actions that can begin to address disparities in Portland.

Term: July 1, 2019 – June 30, 2022.

**Jasmine Varela** is an Operating Engineer at the Portland Water Bureau. A member of the PWB since 2006, her experience spans 3 divisions including Maintenance & Construction (Utility Worker), Customer Service (Water Meter Technician), and Operations (Operating Engineer),

additionally she has been involved with the bureau's safety committee for over 10 years. Jasmine's education includes a Bachelor of Science in Psychology, Oregon DHS certification as a Water Treatment Operator Level II and Water Distribution System Operator Level III. Outside of work, Jasmine is a Varsity Assistant Volleyball coach at Rex Putnam High School (GO KINGSMEN!!!) and has been involved in community coaching for 23 years. She has a deep passion for helping teens become leaders on and off the court and takes her teams to the Oregon Food Bank and the Ronald McDonald House to volunteer and set an example of service in our community.

Term: July 1, 2021 – June 30, 2024; resigned effective July 1, 2022.

**Julia DeGraw** is the Coalition Director for the Oregon League of Conservation Voters and has spent her entire career in the environmental nonprofit sector. She was born and raised in the Portland Metro region and has lived here her entire life except for four years of college in Wisconsin where she earned a BS in Environmental Studies and Sociology from Northland College. Much of her career has focused on water issues including her nine-year stint at Food & Water Watch as the Senior Northwest Organizer where she often advocated for Portland water issues. She is passionate about ensuring a clean environment for future generations, sanitation and clean affordable water for all, and dismantling systemic racism in Portland. Her experience interacting with thousands of residents from her campaigns for public office, alongside her professional experiences make her uniquely suited to serve the diverse interests of people of Portland on the PUB.

Term: January 1, 2021 - June 30, 2023.

**Kaliska Day (Co-Chair)** is a project manager with Wenaha Group and with over 16 years in construction management brings a unique perspective on how utilities impact practical installation. She has familiarity with a breadth of government agencies as well as experience serving several years on the Portland Bureau of Transportation Bureau Budget Advisory Committee. This provided a great opportunity to see the interconnectedness of government and it was rewarding to give input to the process as it would be on the Board. She volunteers with the Oregon Native American Chamber which provides opportunity not just to connect with native communities but also many other diverse communities of color. She joined the PUB in 2019 and brings a unique perspective and voice to the construction industry and the effects of government decisions on contractors as well as a voice to the native community and advocate for a severely under-served demographic.

Term: July 1, 2019 – June 30, 2022. Co-Chair Term: July 1, 2021 – June 30, 2022.

**Karen Y. Spencer** is the Chief Operating Officer and a founding team member for Firmcast dba [Searchfunder.com](https://www.searchfunder.com), an online community and technology platform for search funds. Karen is a member of the State Bars of California and Oregon, as well as the US Patent & Trademark Office. She has over 25 years of experience as in-house and external counsel with a focus on intellectual property, commercial agreements and the legal implications of business decisions. Karen has a wide range of interests, volunteer engagement and training, including the Oregon

Youth Development Council, Portland Parks Foundation, improvisational acting and managing an award-winning blues band. She joined the PUB in 2019 and brings a range of skills in strategic planning, legal analysis, leadership and teamwork to the Board.

Term: July 1, 2019 – June 30, 2022.

**Karen Williams (Co-Chair)** brings experience in hydrogeology, watershed planning, water quality and public administration to the PUB. After several years as an environmental geologist and project manager, she joined the Oregon Department of Environmental Quality and supported watershed councils, local governments and others working across Oregon to measure and improve stream quality. She's now a policy analyst at DEQ and helps to reduce air pollution from cars and trucks. Karen has enjoyed past service on boards for small nonprofit organizations, her union, neighborhood association, and community budget advisory committees.

Term: July 1, 2019 – June 30, 2022 (reappointed, additional term through June 30, 2025).

Co-Chair Term: January 1, 2021 – June 30, 2022, extended through December 31, 2022.

**Robin Castro** is a working class East Portland renter and Senior at Portland State University pursuing a Bachelor's Degree in Environmental Studies. She's an elected member of the student government at Portland State - representing over 26,000 university students and is a founding member & Treasurer of the only progressive student group on campus. She comes from a long line of working class men and women who have experienced economic hardship and hopes to merge her personal experience with poverty and her educational background to provide procedural and environmental justice for her community.

Term: January 1, 2021 - June 30, 2023.

**Theresa Huang** is a planner serving as Project Development Specialist at the Urban Greenspaces Institute. Spending her childhood in Taiwan and upbringing in Oregon, she brings her experience and perspectives that shaped her passion for environmental and social justice to help bring people and nature closer to each other. In addition, she also has a deep understanding of the barriers to engagement and communications that many underserved communities face, especially with the immigrant and refugee community. She completed her studies in environmental studies and urban planning at UO and PSU, and has experience in planning, environmental restoration, urban forestry, and community outreach through her work with Portland Bureau of Environmental Services, Johnson Creek Watershed Council, Friends of Trees, and other nonprofits based in Eugene. Theresa is also a board member of Depave, a local nonprofit that removes over-paved areas to transform it into greenspaces.

Term: January 1, 2021 - June 30, 2023.

**Tom Liptan, fasla** - As a landscape architect Tom worked with the City of Portland, Bureau of Environmental Service for 26 years. He was the catalyst behind research and development of vegetative systems (Green Infrastructure) for rain and stormwater management. He started at BES in Customer Service where he worked across all city neighborhoods and particularly on the eastside Mid-County Sewer Project. Then he was assigned as the team leader for the

preparation and implementation of Portland's first MS4 permit. He participated in the city's CSO compliance project and watershed planning. These projects required extensive interaction with other city bureaus including PBOT, Parks, Urban Forestry and Water Bureau. Since the 1990s he has documented the benefits of stormwater management using vegetated systems and the economic pay-back of such approaches. The first ecoroof in Portland was installed on his garage roof in 1996, over the next several years BES initiated the construction and monitoring of numerous green demonstration projects which all proved to be very successful. Before coming to Portland, he started his career as a parks, forestry and lake restoration planner with the city of Orlando FL. Designing his first "green" stormwater management project in 1978. In 1980 he, with his family, moved to Portland. He went into the private sector working on commercial and residential developments and the first light rail project in East Portland. He has been recognized for this green infrastructure work and has presented papers at more than 200 conferences in the USA and internationally. He volunteers with GRIT (greenroof advocacy), Urban Greenspaces Institute, 82<sup>nd</sup> Ave Coalition and he testifies at city council, PSC, Urban Forestry, and Design Review regarding green infrastructure. In his book, *Sustainable Stormwater Management*, (Timber Press 2017) he documents 40 years of green infrastructure. Today he continues to research the benefits of vegetative systems and provides pro-bono consultation to developers and municipalities.

Term: January 1, 2021 - June 30, 2023.

#### ***FY 2020-21 Ex officio Members***

**Amy Chomowicz** is a governance policy analyst for the newly-formed Project Management Office (PMO). During her 25-year tenure with BES, Amy has held several different positions which combined technical and policy work with program management. Amy started at BES as the grant manager for a \$10 million EPA grant for watershed restoration. She has managed several programs such as the Columbia Slough Watershed program, the city's Ecoroof Program and the Stormwater Stewards Tree Team. These programs were public-facing and focused on providing services to multiple types of populations in Portland using an equity lens. Amy has served on many bureau committees including the PEER program and the Committee for Equity and Diversity. Amy also has a background in energy conservation and electric utility experience. Outside of work, Amy volunteers with Friends of Trees, and she is on the board of the Green Roof information Think-tank, a small non-profit that provides education about sustainable stormwater management. Amy has a Bachelor of Science degree in environmental science from the University of New Hampshire, and a Masters in Urban Planning from the University of Washington.

Term: July 1, 2020 - June 30, 2022.

**Arielle Bradford** is currently an Environmental Technician II at the Bureau of Environmental Services. Her experience spans stormwater and wastewater service portfolios in step with real-world work, and she brings a broad range of experience in environmental science, water quality, and ecosystem restoration work. Arielle has a strong passion for equity, diversity, and

inclusion. Her knowledge and experience managing the intersection of community engagement, water quality, regulatory compliance, revenue, and operations and maintenance strategies will add value to topics presented at the PUB, and empower her to bring the PUB greater awareness of the needs and experiences of our employees and customers, particularly Black, Indigenous, and other communities of color.

Term: July 1, 2021 – June 30, 2022.

**Sarah Messier** is a Water Quality Information Program Coordinator at the Portland Water Bureau. Sarah has worked in the Water Quality Information group at PWB since 2014. Her work includes managing a lead hazard reduction grant program, conducting lead-in-water outreach, producing the annual Drinking Water Quality Report, preparing for emergency communication events, and increasing native language and disability access to water quality information. She has a strong interest in improving workplace culture and co-leads an equity discussion series for the Water Quality group to increase workplace inclusion and delivery of equitable outcomes. Sarah has a Bachelor of Science in Marine and Freshwater Biology from University of New Hampshire and a Masters of Science in Marine Resource Management from Oregon State University. Outside of work, you can find Sarah exploring nature with her family, baking with her two young kids, tending her houseplants, and reading as much as she can.

Term: July 1, 2021 - June 30, 2022. (Reappointed through June 30, 2023)