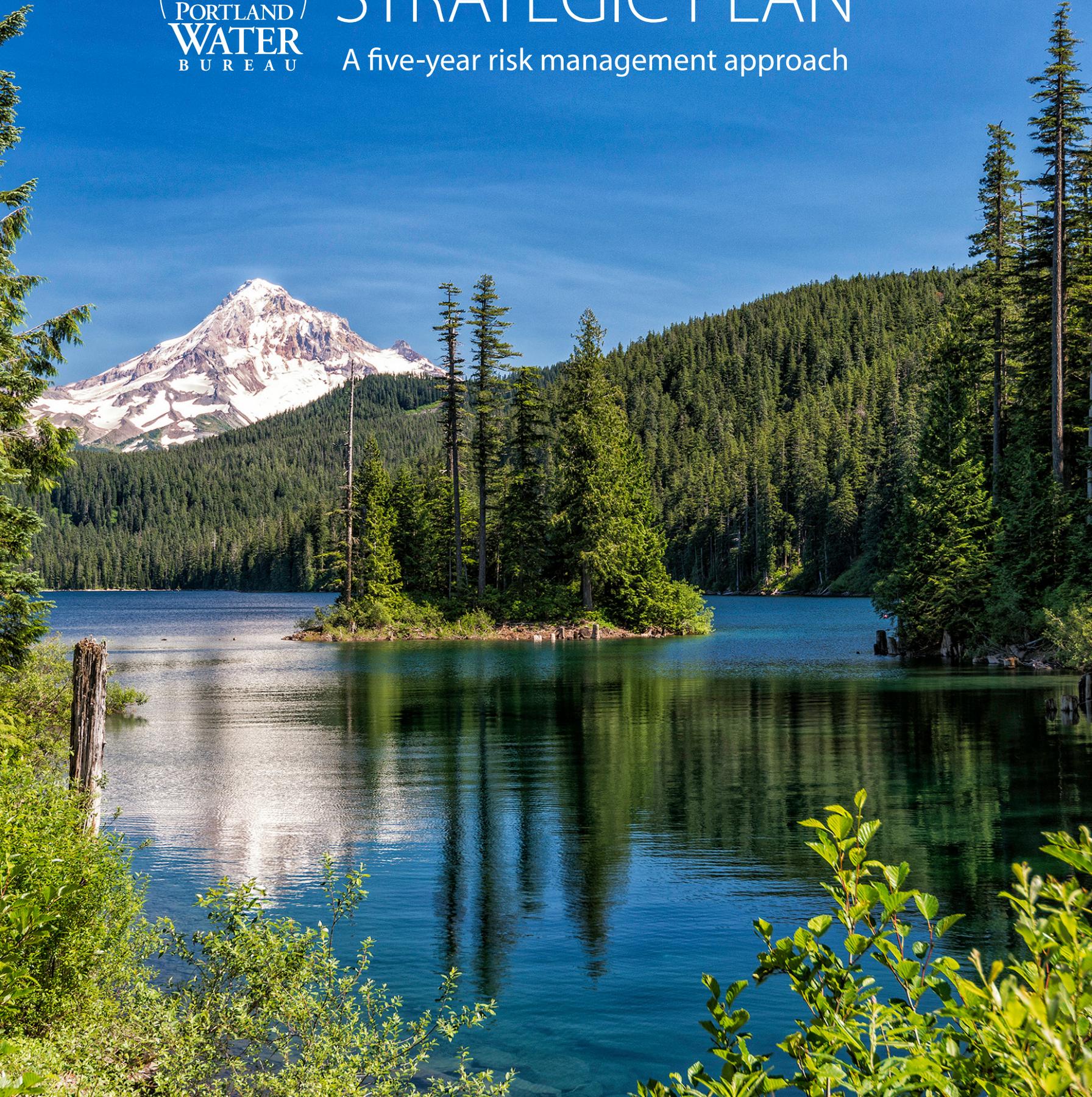




Portland Water Bureau

STRATEGIC PLAN

A five-year risk management approach



Our commitment

A strategic plan is many things. It's a reflection of the values and expertise of an organization, a frame for what's possible, and a snapshot of what the future holds.

When we—the Water Bureau workforce—began to plan our focus for 2020-2024, we hoped to create a plan that was adaptable, durable, and more than another document on a shelf. After a two-year collaborative effort at all levels of the bureau and in consultation with community leaders, we've arrived on a clear set of priorities to guide our work.

In this plan, we propose solutions to a range of pressing issues, including water service affordability; the effects of climate change on our system; workforce and service equity; regional emergency preparedness and resilience; and a need for deeper community relationships.

Addressing risks

This plan tackles challenges. To create the plan, we identified strategic risks to the Water Bureau and asked community partners to do the same. We had honest conversations about the challenges we face and how we can address them.

Embedding equity

We considered equity in every part of this planning process, with the goal of creating a plan that reduces systemic inequality and its impacts on our employees and the people we serve. We collected equity-specific risks, scored risk consequences based on equity, identified strategies that would lead to equitable outcomes, and redefined our organization's commitment to equity.

Directing focus

This plan doesn't describe all the work the Water Bureau does and will continue to do. The plan addresses the risks we identified and focuses us on specific areas that have room for improvement. We will still do the daily work of a water utility, including testing the water, replacing hydrants, building new pipelines, and answering customer calls.

Looking ahead

As we put the plan into action, we will:

- Continue to work across our organization and with stakeholders.
- Regularly revisit and reevaluate strategic risks.
- Consider equity impacts in all of our work.
- Measure outcomes.
- Communicate with our employees, our community, and our partners about progress, decisions, and lessons learned.

We're proud to present this commitment to the people who enjoy the excellent water we deliver every minute of every day.

Onward,

The Portland Water Bureau

August 2019

Portland city skyline. Cover: The Bull Run Watershed is the primary drinking water supply for the City of Portland and its wholesale customers.

What we do

The Portland Water Bureau's 600 employees work together to serve almost a million people in the Portland area.



We manage and protect Portland's water sources.

We focus on the people we serve. We work with our community through customer service, communications, water efficiency, and education programs.



We test and treat the water to make sure it's safe to drink.

We install and maintain infrastructure, from 2-inch water mains to 108-inch water conduits. We maintain dams, reservoirs, tanks, pump stations, valves, and hydrants.



We plan ahead so that we'll always have excellent water quality, ample supply, reliable infrastructure, top-line customer service, and strong environmental stewardship. We plan so that we'll have a water system that will continue to work in the face of challenges.



We contribute to a well-run organization. This means managing everything from money—bonds, budgets, and accounting—to properties, work sites, and contracts.



We collect customer payments to fund water services and programs, and we offer financial help to income-qualified customers.



We strive to create an adaptable Water Bureau, supporting each other with organizational change and equity work.

Our new guiding statements

Mission We serve excellent water every minute of every day.

Vision The water our community loves is safe and abundant for generations to come.

Equity We work to uproot systemic inequities and their impacts on our employees and the people we serve. We commit to the difficult—and essential—work of transforming Water Bureau policies, practices, and culture to better serve historically and currently oppressed communities.

Values **Honor our responsibility.** We take part in a long legacy of careful stewardship of natural resources, infrastructure, and public trust. We never forget that water is essential.

Serve our community. We know people depend on us. We are dedicated to listening, communicating, and acting with compassion.

Work well. Our strength lies in the skills, expertise, and creativity our employees bring to work every day. We work hard, we work safely, and we adapt.

Use money wisely. We work to control costs while maintaining high standards. We invest to make our water system stronger, more flexible, and better prepared for challenges ahead.

Build relationships. We recognize the power of collaboration—with customers, coworkers, and partner organizations. Our relationships guide our work.

Our strategic planning approach

The process of developing a strategic plan can be as valuable as the document itself. To develop this plan, we collaborated across the bureau and with key partners, assessed and prioritized strategic risks, and focused on equity.



Ongoing work

The strategic risk management goals on the following pages show how the Water Bureau plans to change the way it works. While we implement the strategic plan, we remain deeply committed to continuing our work on:

Affordability

- Enroll income-qualified customers in our **financial assistance** program.
- Improve how we offer financial assistance to people in all types of residences.

Stewardship

- Combine engineering, economics, and business best practices to identify the most cost-effective and efficient ways to **manage assets**.
- Prioritize infrastructure repair and replacement based on data.
- Protect the natural conditions and ecosystems essential to Portland's **water sources**.

Seismic resilience

- Implement the bureau's seismic resilience plan.
- Finish building a new seismically sound reservoir at **Washington Park**.
- Start building a **seismically sound pipeline** deep underneath the Willamette River.

Water quality

- Monitor **water quality**—with over 10,000 tests each year—for both Bull Run and Columbia South Shore Well Field water.
- Install improved **corrosion control treatment**.
- Plan and start building a **Bull Run filtration facility**.

Our capital improvement projects support a growing city and strengthen our system against disasters like earthquakes. New infrastructure like this underground reservoir at Powell Butte uses a seismically resilient approach.



“We focused on strategic risks because they pose the greatest threat to fulfilling our mission. By collaborating across the bureau and with stakeholders, we uncovered the biggest risks and crafted thoughtful strategies.”

— Management Team member

Strategic risk management goals

As part of the strategic risk planning approach, bureau staff characterized and grouped risks, brainstormed strategies to address these risks, and evaluated the strategies. These strategies revealed five strategic risk management goals that need particular focus:

- System reliability
- Community relationships
- Workforce & culture
- Organizational processes
- Accountability & leadership

Each of the five strategic risk management goals includes a set of objectives and a preliminary list of strategies.

Strategic risk management goal

OBJECTIVES	STRATEGIES	EQUITY IMPACT	TIMING	SPONSORS
<p>Objectives are further refinement of the goal and describe the intent of a group of strategies.</p>	<p>Strategies are specific actions that will mitigate specific risks and create change. Some strategies, by their nature, are more defined than others. The Sponsors and Transition Teams will determine the scope and performance measures of each strategy as the first step in implementation.</p>	<p>Equity impact</p> <p>E indicates strategies that have a high potential to advance equity. These strategies focus on underserved and underrepresented people and places.</p>	<p>Timing shows when the bureau will start to focus on the strategy.</p> <p>2 indicates strategies the bureau will start to address in the first two years, and</p> <p>5 indicates strategies the bureau will start to address within the five-year plan.</p>	<p>Sponsors are the bureau leaders responsible for leading and communicating the implementation of the strategy. Each strategy has a Lead Sponsor (large font) and Co-Sponsors (smaller font).</p>

System reliability

OBJECTIVES	STRATEGIES	EQUITY IMPACT	TIMING	SPONSORS
A. Groundwater system Invest in infrastructure and staffing to ensure reliable performance and annual availability of the City's potable groundwater system as a seasonal supplemental source and emergency backup.	1. Make sure the Groundwater Steering Committee is composed of the appropriate level of decision makers in order to better coordinate groundwater management and planning.		2	Director of Operations Chief Engineer Director of Resource Protection
	2. Improve communication of groundwater planning and operational status across bureau groups (for example, in regular Management Team updates).		2	
	3. Support the Groundwater Steering Committee to review current groundwater staffing levels and asset needs and recommend appropriate investments in groundwater resources and infrastructure.		2	
	4. When maintaining or replacing equipment, prioritize work that will make the system more reliable.		2	
B. Emergency management Continue to prepare for regionwide emergencies.	1. Update, finalize, and share emergency plans. Continue to create an employee culture of personal and professional preparedness.		2	Chief Engineer Director of Maintenance and Construction Director of Operations
	2. Work with local, regional, and national partners to plan for equitable emergency water distribution during systemwide emergencies.	E	5	
	3. Establish equipment storage points and staffing processes for fixing infrastructure after a major disaster. Consider equity when planning for post-disaster system repair.	E	2	
C. Climate change response Bring climate change work into organization-wide planning, communications, and operations.	1. Help outdoor work crews prepare for extreme weather and wildfire smoke.	E	2	Director of Resource Protection Director of Maintenance and Construction
	2. Communicate more—internally and externally—about climate planning, including through a report summarizing climate change work.		2	
	3. Continue to work with other agencies and scientists to plan for climate-related changes in supply and demand.		2	
	4. Continue to reduce carbon emissions of bureau facilities and fleet.	E	2	
D. Technology expertise & capacity Make sure the technology the bureau uses is secure and effective.	1. Hire a Water Bureau Technology Manager to coordinate technology systems within the bureau, and to work with other City employees to meet the organization's unique technology needs.		2	Director of Customer Service Director of Operations
	2. Develop a technology plan to improve data security and incident response, and to prioritize investment in data systems.		2	

E High potential to advance equity **2** Implementation starts within 2 years **5** Implementation starts within 5 years



Above: Meter shop staff regularly test water meters for accuracy. Below: We play an important role in fighting fires. Our crews maintain about 16,000 hydrants in the City of Portland.



“Climate change resilience affects the entire bureau. I’m excited that we are taking seriously these issues and organizational challenges!”

— Risk management strategy team member

Community relationships

OBJECTIVES	STRATEGIES	EQUITY IMPACT	TIMING	SPONSORS
A. Community connections Modernize communications, prioritizing strong community connections. Build relationships to better engage underserved and underrepresented communities.	1. Develop and implement an external strategic communications plan that prioritizes cultural responsiveness and public trust.	E	2	Communications Manager Director of Resource Protection Equity Manager
	2. Enable employees to represent the bureau at community events by clarifying time and pay policies and by creating a Community Ambassador Program.	E	2	
	3. Create more ways for people from underrepresented communities to meaningfully inform bureau policies, programs, and projects.	E	2	
	4. Create more and deeper partnerships with community organizations and people from underrepresented communities. Track community engagement and offer services where they may be missing.	E	5	
	5. Extend the reach of the current education program, focusing on underserved and underrepresented communities.	E	5	
	6. Support and train employees to implement the Racial Equity Plan's community-oriented strategies.	E	2	
B. Equitable access Provide equitable access to water service and programs.	1. Research how smart meter technology could affect the bureau and the communities we serve, focusing on equity impacts of smart meter implementation.	E	2	Director of Customer Service Equity Manager Director of Finance
	2. Study rate structures that prioritize affordability, including rates that incorporate a very inexpensive lifeline (or essential) water use amount.	E	5	
	3. Hire more multilingual employees and research ways to compensate employees who bring and use multiple language skills.	E	5	
C. City partnerships Serve our community better by strengthening collaboration across city government.	1. Develop a clearer and more collaborative process for creating procedures that will affect other bureaus.		2	Director of Finance Chief Engineer Deputy Director
	2. Explore how to develop service level agreements for the work bureaus do for each other.		2	
	3. Encourage and support employees to build relationships with staff in other bureaus. Encourage bureau leaders to develop relationships with staff in elected offices.		2	

E High potential to advance equity **2** Implementation starts within 2 years **5** Implementation starts within 5 years



Above: Our staff attend community events throughout the year to share information and listen to our community. Below: Come find us! Our portable water station can be found at bureau-sponsored events throughout town.



“We are hoping to set up and establish more routine, standing ways of communicating, not just on urgent issues. We don’t want to meet each other over the broken pipes.”

— Community stakeholder

Workforce & culture

OBJECTIVES	STRATEGIES	EQUITY IMPACT	TIMING	SPONSORS
A. Workplace communication & collaboration Create and embed a more positive and collaborative workplace culture.	1. Reward cross-group collaboration in employee events, awards, and evaluations.		2	Communications Manager Equity Manager
	2. Establish clear expectations for how employees work across groups and how long internal bureau processes should take.		5	
	3. Create new ways to recognize the contributions and accomplishments of all work groups.	E	2	
	4. Provide consistent and more equitable access to cross-group learning opportunities like the SOAKED (Sharing our Assets and Knowledge for Employee Development) program.	E	2	
	5. Implement tools that enable more data sharing and collaboration across groups.	E	2	
	6. Develop an internal strategic communications plan for improving coworkers' relationships and understanding of each other's work.	E	2	
B. Recruitment & retention Create a more equitable, welcoming, flexible, and safe workplace for all employees.	1. Improve recruitment processes by strategically promoting the Water Bureau, writing clear position descriptions, and training managers on hiring best practices.	E	5	Equity Manager Director of Finance
	2. Identify and implement equitable hiring and retention practices.	E	2	
	3. Elevate the Racial Equity Plan within the bureau by increasing communication and training about the plan's tools and goals, and by connecting all employees work to the plan.	E	2	
	4. Explore offering flexible schedules and telecommuting opportunities to more employees.	E	2	
	5. Create clear processes for identifying and accommodating individual employee needs. People may need flexible or part-time schedules, accommodations for disabilities, or equitable access to paid time for professional development.	E	5	
	6. Develop leave standards that are consistent across groups and within City guidelines.	E	2	
	7. Build and maintain leadership development for current and rising leaders to make management more diverse. Embody an inclusive management philosophy to improve recruitment and retention of women and people of color.	E	2	
	8. Create a workplace culture in which all employees feel (and are) safe, regardless of identity. Implement procedures for reporting and responding to bigotry and hate directed at any bureau employee.	E	2	
C. Empowered employees Support employees to do their best work.	1. Encourage employee growth through mentorship programs, tuition assistance, and clearer pathways for promotion; focus on underrepresented groups.	E	5	Equity Manager Communications Manager Director of Customer Service
	2. Increase use of the job shadow program.	E	2	
	3. Institute processes for debriefing major events and identifying how we can do better next time.	E	2	
	4. Empower employees to identify safety challenges and uphold safety standards.		2	
	5. Create mechanisms for employees to recommend improvements to bureau work, and for managers to consider and potentially implement their recommendations.		5	



Above: Emergency dispatchers respond to 220 inquiries each day, dispatching services and helping customers after business hours. Below: Our Maintenance and Construction teams work around the city to maintain our water system—from underground pipes to above-ground hydrants.



“The Portland Water Bureau needs to be open to new ideas in attracting and retaining staff.”
 — Community stakeholder

E High potential to advance equity 2 Implementation starts within 2 years 5 Implementation starts within 5 years

Organizational processes

OBJECTIVES	STRATEGIES	EQUITY IMPACT	TIMING	SPONSORS
A. Project development and delivery Help major projects run smoothly.	1. Identify and assign individuals' roles and performance expectations for each project.		2	Director of Maintenance and Construction Chief Engineer Director of Operations
	2. Continue to review and improve E3 (Efficient and Effective Engineering) processes.		2	
	3. Improve and increase contracting and project management training for project managers.		2	
	4. Assign every major project a Management Team sponsor.		5	
	5. Monitor, communicate about, and coordinate project performance at all phases, including during transitions between groups and phases.		5	
B. Standards of practice Increase communication across the bureau to improve efficiency and collaboration, and to prevent the loss of institutional knowledge.	1. Standardize how we establish and update service levels.		2	Deputy Director Director of Resource Protection Chief Engineer
	2. Deepen our understanding of each other's work and how our work connects.		2	
	3. Build a bureau culture where we treat each other as partners and demonstrate respect for each other's work.	E	5	
	4. Identify areas of the bureau where loss of institutional knowledge is greatest and work to capture that knowledge.		5	
C. Financial management Manage budget programs to improve understanding and collaboration across work groups. (Budget programs are categories of bureau work that show how money is spent.)	1. Establish performance measures for each budget program.		2	Director of Finance Director of Maintenance and Construction
	2. Improve how groups work together to meet the goals of each budget program.		5	
	3. Explore how we can better manage budget programs.		2	
	4. Give managers more tools for managing budgets, particularly in the form of better training about how to use SAP (the City's financial planning and budgeting software).		2	

E High potential to advance equity **2** Implementation starts within 2 years **5** Implementation starts within 5 years

Timing our focus

We know we can't do everything at once. Bureau leaders used these questions to determine when to focus energy on each strategy:

- Are we already working on this strategy?
- What strategies can we start right away?
- Do some strategies depend on each other? Does one need to come first?
- Which strategies will have broad organizational impact?
- Is there a good balance of work between strategy sponsors?

The timing is a guideline, not a rule. We'll revisit and revise each strategy as we put the plan into place.

"The cross-group collaboration was important. Vital for relationship building, priority informing, and general knowledge.

— Risk management strategy team member

Accountability & leadership

OBJECTIVES	STRATEGIES	EQUITY IMPACT	TIMING	SPONSORS
A. Recognition of value Commit to a culture that values the work of all groups.	1. Identify new and effective ways to help staff engage in work and support the values of the bureau's guiding statements.	E	2	Director of the Portland Water Bureau
	2. Give employees clear performance expectations and an understanding of how their roles fit within the bureau as a whole.		2	
	3. Encourage and support decision making at the level of those closest to the information and need.		2	Director of Finance
	4. Set consistent guidelines for the format and content of performance evaluations.	E	5	
B. Leadership development Build leadership skills so that managers and supervisors can support employees in bringing their best to their work.	1. Train managers and supervisors to recruit and retain excellent employees, build strong teams, and encourage employee development.	E	2	Deputy Director
	2. Create cohort groups in which managers and supervisors can collaborate about shared challenges (such as goal setting, rewards, and management style).		2	Director of the Portland Water Bureau
	3. Require managers and supervisors to regularly evaluate (and set goals with) each of their employees. Provide support so that this is practical and effective.	E	2	
C. Decision making Embed effective decision-making processes throughout the organization.	1. Support teams in recognizing, discussing, and managing conflict.	E	2	Deputy Director
	2. Make opportunities for employees at all levels to participate in relevant decision making.	E	2	Director of the Portland Water Bureau
	3. Include many perspectives in decision making and be open with each other about the decisions we make.	E	5	

E High potential to advance equity
 2 Implementation starts within 2 years
 5 Implementation starts within 5 years



Above: Our emergency operations center is ready to activate 24/7 to respond to emergency events. Below: Development services staff review plans to ensure they meet code and safety requirements.



“As leaders, we’re always working to empower our teams with the resources and support they need to bring their whole selves to work. This plan gives us concrete ways to do that.”
 — Management Team member

To achieve our goals

We commit to supporting each other and collaborating.

Each of us has a role in making the Strategic Plan successful.

- The **Management Team**—as the senior leadership group of the bureau—leads, communicates, supports, and informs the implementation process. Each member **sponsors** specific objectives, holds fellow members accountable, and facilitates Transition Teams.
- **Transition Teams** are groups of employees from many work groups and organizational levels. These teams work with Sponsors to scope, plan, and implement objectives and strategies.
- The **Strategic Plan Program Team** supports the Management Team and Transition Teams with tools and resources.

“The collaboration and conversations with one another have been invaluable. That process has already initiated change on its own.”

— Risk management strategy team member

We commit to building and improving processes to connect, communicate, and measure our work.

- **Performance measures** help us develop, analyze, and report metrics to assess outcomes.
- The **Timeline** shows when we implement strategies. The timeline considers short- and long-term execution, how implementation might affect current systems, and the need for reasonable expectations.
- Instituting an annual **Strategic Summit** allows us to communicate and celebrate our progress, identify new risks, share ideas, and inform the annual bureau budget.



Together

we will keep the water our
community loves safe and abundant
for generations to come.

Want to know more about the Strategic Plan?

Visit portlandoregon.gov/water/strategicplan for information on the development process, plans for implementation, and updates.

Have questions?

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